User Guide
ePHOENIX version 4.3

Summary

This document is a user guide for ePHOENIX.

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Table of contents

Table of figures

Figure 78: MADRAS versions settings 111

1 Introduction

1.1 Audience

The intended audience is people who need to know the structure of ePHOENIX.

1.2 Overview

This document has the following general structure:

- chapter 2 describes the main components of the ePHOENIX architectural environment
- chapter 3 describes the MADRAS and ePHOENIX concepts
- chapter 4 describes the MADRAS interface to the ePHOENIX tools
- chapter 5 describes the Mailbox
- chapter 6 describes the Team Manager
- chapter 7 describes the dossier functions
- chapter 8 describes the Image Viewer
- chapter 9 describes printing
- chapter 10 defines working with forms and annexes
- chapter 11 describes Document Controls.
- chapter 12 covers file inspections
- chapter 13 gives the MADRAS settings.

2 ePHOENIX architecture

The application architecture describes the main components of the ePHOENIX architectural environment

ePHOENIX is at the core of a system consisting of the following main components:

- epoScan system, which allows paper documents to be scanned into ePHOENIX.
- MADRAS GUI, which presents the users view of the system, integrating the ePHOENIX interface with other applications, including batch indexing of documents, emulators for mainframe systems, user configuration tools etc.
- web-based monitoring
- back-end systems, including legacy (procedural) servers and the databases for the dossier images and associated data.

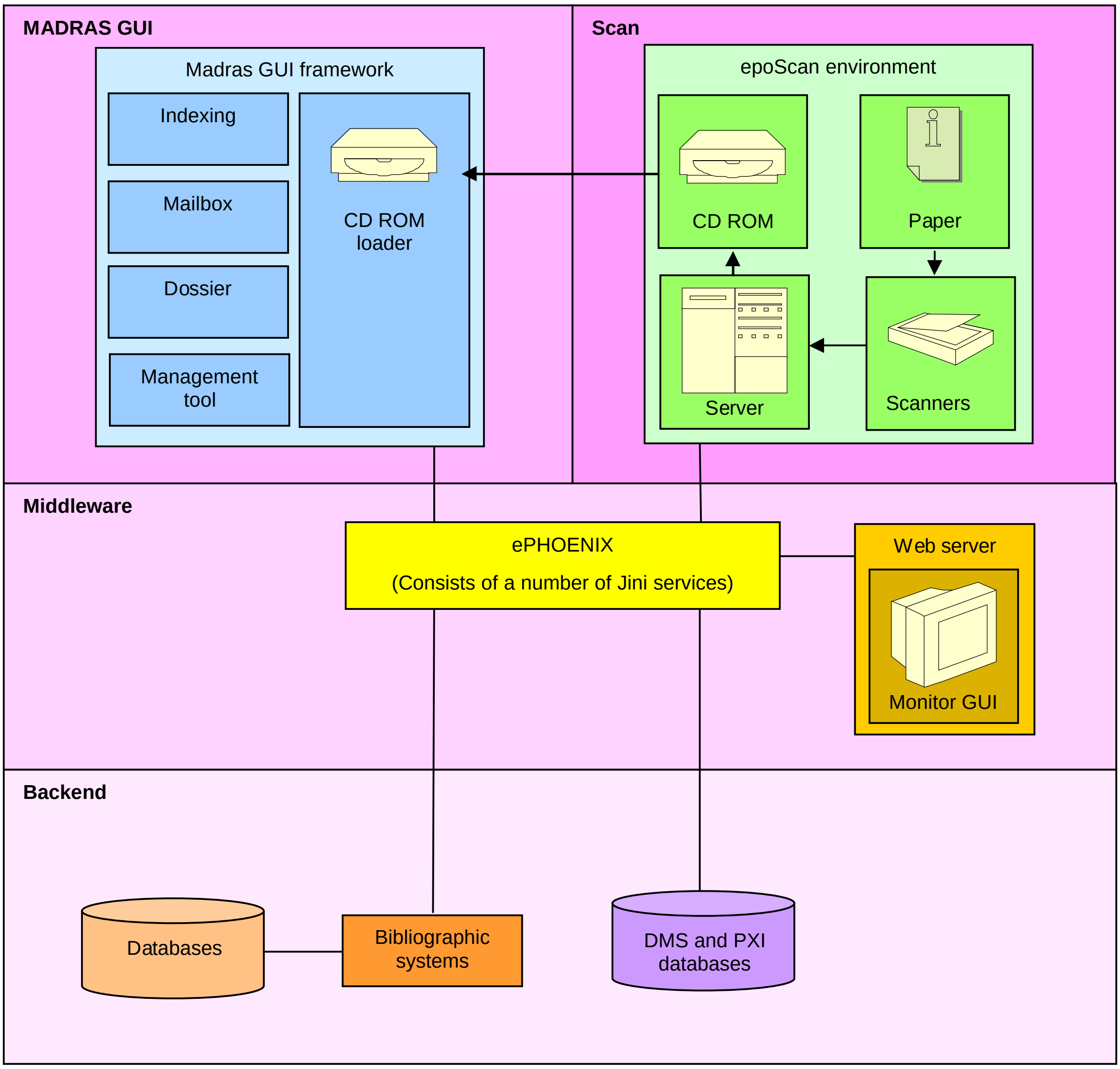


Figure 1: ePHOENIX architectural environment main components

3 MADRAS and ePHOENIX concepts

ePhoenix is built around the concept of the electronic dossier. A dossier is the collection of all the data and documents belonging to one patent application. The purpose of ePHOENIX is to store as much as possible of this documentation electronically, to avoid the disadvantages of handling and storing paper records. A dossier may include folders, which subdivide the dossier into groups of related documents.

In the course of scanning and indexing paper documents to be added to ePHOENIX, documents are assembled into packages, which consist of one or more documents of the same legal date relating to the same dossier. Packages are assembled into a batch, a set of packages scanned and indexed at the same time.

When a new document is created in ePHOENIX, a message may be generated. This is delivered to the team or user expected to deal with it. If a user receives a message, they can open the dossier from the message and take appropriate action on it.

Most of this is done automatically, based on the type of the document and the configuration set up by the local Administrator and the Team Manager. However, it is also possible to open dossiers and create messages ad hoc to deal with other situations, for example, phone calls.

3.1 ePHOENIX users

3.1.1 Team membership and Mailboxes

Each ePHOENIX user is member of one or more ePHOENIX teams. Examples of teams are the Receiving Office, Change of Rights department and groups of Examiners.

Each user has access to their own Mailbox. for each team they are a member of, as well as to the . Team Mailbox for each team. The Team Mailbox contains messages not assigned to any individual team Member.

ePHOENIX includes facilities for the team manager to configure who shall receive specific documents within the team. The user Administrator has another tool within MADRAS called the Management Tool (or Manager). This tool allows formatting such changes centrally.

3.1.2 User profiles.

For each team in which a user is a member, they have a user profile that determines what they can and cannot do in the system. This profile depends on their employment; for example, a Manager profile may have access to the Team Manager tool whilst an Examiner does not.

If a user`s profile does not allow access to a menu item, then it is either disabled on the screen , appearing in grey, or is not present at all.

After a user has logged into their system, using their personal user ID and password, they can use MADRAS and ePHOENIX.

Note:

If the system administrator has set up a special user ID . and password. for MADRAS, users must use this.

3.1.3 Member parameters

ePHOENIX stores information related to membership of each team. It determines how messages should be distributed to team members, taking account of the information held on members and also a fair distribution of the workload.

The information stored is:

- user profile
- team
- location of team
- working languages
- part-time, if appropriate
- absence
- expertise
- Doc Sets
- Dossier range, based on end numbers, applicant, class etc.

3.1.4 Preferences for MADRAS and ePHOENIX settings

Users can make changes to the layout and arrangement of the windows and dialogues, the sorting order of the Mailbox and many other settings in MADRAS. When users first open MADRAS, the system uses its default settings. Each user can choose to keep these settings or customize them to suit their preference.

3.2 Messages

Note:

It is important to remember that an ePHOENIX message is simply a reference or link to a dossier; it is not the dossier itself.

It is therefore possible for several messages to exist for the same dossier at the same time and, possibly, in different mailboxes, although there are measures designed to avoid this. Normally, messages are linked to new documents, for example:

- a newly filed document that has been scanned
- a document that has been created by another program (for example, printing system)
- an existing message that has been forwarded

Sometimes however, there are no images associated with the message, for example:

- a message created by an ePHOENIX user
- a trigger generated by a legacy system.

3.3 Distribution of messages

ePHOENIX distributes messages automatically either to individual or Team Mailboxes. For those messages sent to a Team Mailbox, manual redistribution must take place to individuals.

3.3.1 Bulk distribution

Depending on the preferences expressed by the various teams, bulk distribution can be carried out in various ways, called distribution algorithms

Distribution algorithms	
Algorithm	**Distribution**
Round Robin	Messages equally distributed amongst team members
Team	Distribution only as far as the Team Mailbox
Others	Available if set up at that Office

3.3.2 Redistribution of workload

Some messages in ePHOENIX are distributed to Team Mailboxes. From these mailboxes, messages can be redistributed or transferred by individual team members or managers.

- If a user is a Team Manager, they have access to the Team Manager tool. Here they can assign one or more messages to team members. Within the Team Mailbox, a user can sort the messages according to date, dossier number, code etc., and there is an overview of the number of messages currently in each team members mailbox. A user cannot view the contents of dossiers from the Team Mailbox.
- As a team member, a user has direct access to the Team Mailbox. Within the Team Mailbox, a user can transfer messages to their own mailbox.

  Note:
  A user can only assign messages to other people from their own mailbox by forwarding them after they have opened the dossier..

- If a team member is unexpectedly absent, the team manager can transfer messages back to the Team Mailbox. They can then be re-assigned to other team members if necessary.

3.4 Dossier ownership

Ownership of a document can be

- permanent
- temporary.

If a dossier is in either permanent or temporary ownership this overrides the normal distribution rules and the message is routed to the dossier owner. This measure is intended to prevent the same dossier being handled by two different people at the same time.

3.4.1 Permanent ownership

Permanent ownership is deliberately selected by an ePHOENIX user. It allows the user to become the owner of a dossier until that ownership is removed. It has precedence over temporary ownership. This enables, for example, a senior user to ensure that he or she is the only person to handle a sensitive patent application.

3.4.2 Temporary ownership

If a user has an unopened, forwarded, or pending message in their mailbox, they become the temporary owner of the dossier.

Some mailboxes, however, may not be allowed to become temporary owners of a patent application, for example, the Change of Rights team.

3.5 Single dossier concept

In the paper world, it is possible for several paper dossiers to be created for what is essentially a single patent application, for example, PCT Receiving Office, PCT Searching Authority, PCT Chapter II, Appeal etc.

ePHOENIX has therefore adopted a single dossier concept so that all documents for one logical patent application are stored in a single ePHOENIX dossier, comprising a number of folders. This dossier can be accessed through different dossier numbers.

Each user can specify their preferred folder

In practice, this means that an ePHOENIX user working in the PCT Chapter II procedure sees the PCT II folder by default, but can always choose to look at the PCT Receiving Office folder if it is useful to do so.

The documents themselves are placed into a particular folder by ePHOENIX based on information contained in the DocCode that is allocated during indexing. If an incorrect DocCode has been allocated, the document could be placed in the wrong folder. It is the responsibility of the person checking the document to ensure it is correctly identified.

4 The MADRAS interface to the ePHOENIX tools

4.1 Overview

All the ePHOENIX tools are available through the MADRAS interface, which the user must start before they can work with their mailbox and dossiers.

MADRAS contains a number of other tools, which are not covered in this manual.

4.2 Starting working with MADRAS and ePHOENIX

Click on the Windows Start button and locate MADRAS in the **Start** Menu, or, if there is one, double-click on the shortcut to MADRAS on the desktop.

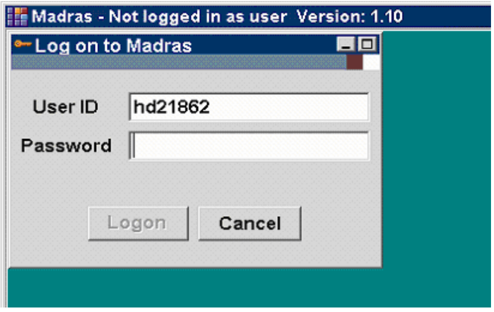


Figure 2: logging on to MADRAS

The system administrator may have configured M;ADRAS to automatically log a uswer on. If not a user may be prompted to enter the user`s user ID and password. In this case the user must type in their normal password. MADRAS normally fills in their user ID for them.

In order to move the cursor from the User ID to Password fields, use

- the mouse and click on the Password field
  or
- the Tab key.

but do not use the **Enter** or **Return** key or the empty Password field will be compared with the password and login will fail unless the password is an empty field.

To complete the logon process, click on the **Logon** button or press the **Enter** or **Return** key.

4.3 The MADRAS window

Note:

If a user is not logged in the selection of tools is very limited.

After a user has logged in to MADRAS, the selection includes all the tools to which their user profile and other settings grant access. Hence they may not see all the options described in this manual if they have not been granted access.

If the user has changed any of the user settings then the appearance of the window will differ from the windows shown here.

The MADRAS screen is maximized by default but can be made smaller. This allows the user to access the other programs on their desktop without moving the windows.

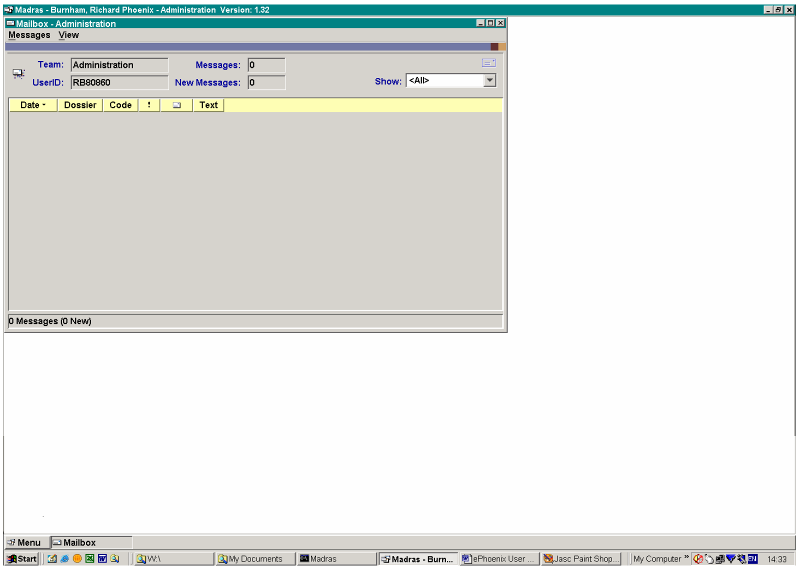


Figure 3: the MADRAS window

There are three main parts to the MADRAS window:

- At the top, there is the MADRAS title bar.
- Below that, there is an area where windows appear containing the various tools in the MADRAS set. When the user starts MADRAS, depending on their settings, a window may already be open in this area, as in the illustration above.
- At the bottom is the MADRAS taskbar. When a user has started working with the tools, various buttons appear here. If no windows are open, there is just the **Menu** button, which displays the MADRAS menu when the user clicks on it.

Below the MADRAS taskbar is the Windows taskbar, which is not part of the MADRAS window.

4.4 Using MADRAS

4.4.1 Menus

The MADRAS menu is normally on the taskbar. By default, this is at bottom left of the MADRAS screen, above the Windows Start button.

To choose a menu, click once with the left mouse button on the menu name. A pop-up list appears showing the available commands on that menu. To choose a command, click once with the left mouse button on the name.

When the user chooses a menu item in MADRAS, the system often presents them with a dialogue box in which they have to give further details of theirr request. For example, if they want to print a document, they are asked where they want to print it, how many copies etc. Select or type in the required details, then click on **OK**. If they do not want to proceed with the action, they can click on **Cancel**.

4.5 The MADRAS menu and tools

4.5.1 The menu

To access a tool in MADRAS:

- Click on the **Menu** button on the MADRAS Taskbar. The MADRAS menu pops up.
- Click on the required option in the menu.

The options shown in the menu depend both on the user profile and on the options available to the user.

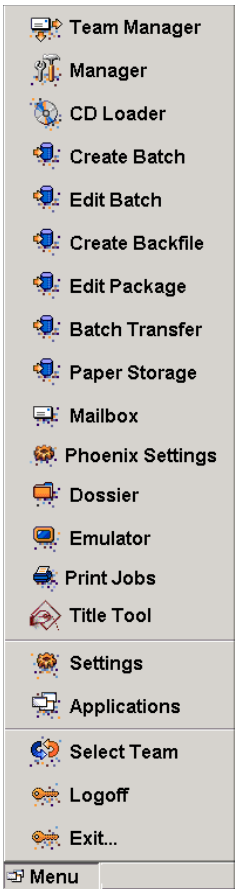


Figure 4: MADRAS menu

MADRAS menu	
An asterisk (*) denotes a function which is available only to users with relevant profiles or special privileges.	
Team Manager (*)	Enables the Team Manager to assign and re-assign messages to team members.
Manager (*)	The ePHOENIX Management Tool.
CD Loader (*)	
Create Batch (*)	
Edit Batch (*)	
Create Backfile (*)	
Edit Package (*)	
Batch Transfer (*)	
Paper Storage (*)	
Mailbox	Opens the Mailbox
Phoenix settings	Customises the user`s view of ePHOENIX tools.
Dossier	Enables the user to open a dossier and view its data and contents.
Emulator	Opens an emulator window to access mainframe programs within the MADRAS window. The user can open more than one emulator window at a time.
Print Jobs	Enables the user to check the status of print jobs sent to a network printer.
Other items	There may be other tools available that are not part of ePHOENIX.
Settings	Enables the user to, amongst other things, adjust the general appearance of the MADRAS window, including the font size for all tools and the positions of the MADRAS Taskbar and Toolbar.
Applications	Displays a Toolbar (menu) in a separate window that remains open until the user closes it.
Select Team	Enables the user to select the Team they want to work in.
Logon/Logoff	Log on to or log off from MADRAS (depends on whether or not the user is already logged in).
Exit…	Exit from MADRAS. The user is asked to confirm that they wish to do this.

Each of these tools is a separate program, running under MADRAS in its own window. In the case of the emulator, the user can have more than one of these programs active at the same time.

Each active window is represented by a button in the MADRAS taskbar. Click on the button to bring the associated window to the foreground.

4.5.2 Right-click menu

If the user right-clicks on an empty part of the Madras window, a menu pops up. This has several options:

MADRAS right-click menu	
Name(s) of active window(s)	Click on a name to bring that window on top. This does not work if the Always on Top option below has been selected.
Settings	Same as selecting Settings on the MADRAS menu.
Always on Top	Displays the name(s) of active window(s). Click on a name to keep that window on top of the others. Click again to cancel.
Exit…	Same as Exit on the MADRAS menu.

4.5.3 Keyboard equivalents

MADRAS keyboard equivalents	
Phoenix settings	Press **F12**
Open dossier	Press **F2**
Close dossier	Press **F3**
Select Team	Press **F11**

4.6 The applications toolbar

If the user clicks on the Applications option in the MADRAS menu a toolbar is displayed which is a menu of tools displayed in a separate window

The Toolbar has two tabs:

- Products, which enables the user to select tools
- System, which has an option to exit from Madras.

4.7 Closing tools in MADRAS

To close a MADRAS tool, click on the appropriate menu item, for example, **Exit** from a Mailbox or **Close** from a dossier. In some cases, the user may have to click on **OK**.

Often the user has a choice:

- to continue with an operation, for example by clicking **OK**
- not to continue, by clicking **Cancel**.

4.8 Logging off and exiting from MADRAS

There is a difference between logging off and exiting from MADRAS.

- Log off when the user may want to reopen MADRAS under a different User ID.
- Exit when the user has finished working for the day. This logs the user off and closes down the MADRAS session.

Before the user does either, they must make sure that they have closed all open windows in Madras. When a tool or window is open, a message may be displayed asking the user to close it first. The user will need to click **OK** on the message then close the window before proceeding.

4.8.1 To log off from MADRAS:

- choose **Logoff** from the MADRAS menu, then click on **Yes** to confirm.

4.8.2 To exit from MADRAS:

- choose **Exit** from the MADRAS menu
- or hold down the **Alt** button and press **F4**
- or click on the box with the cross (**X**) at the top right of the MADRAS window.

When the user exits MADRAS, they must click on **Yes** to confirm.

5 Mailbox

A MADRAS Mailbox is the electronic equivalent of the traditional in-tray. Each is a container for the user`s current work. The user can work with their Mailbox as they do with mail delivered by the messenger. The Mailbox displays the work for the day.

In ePHOENIX there are two types of mailbox:

- individual (Team member) mailboxes
- Team Mailboxes.

Every ePHOENIX user is a member of one or more Teams.

5.1 Opening the Mailbox

After a user has logged on to MADRAS, the first item they will normally wish to access is the Mailbox.

To open the Mailbox, click on **Mailbox** in the **MADRAS** Menu. The Mailbox opens for the user`s default Team, unless they have changed this preference.

They can change the setting so that the Mailbox opens when they start MADRAS.

5.2 Mailbox contents

The Mailbox contains messages representing activities that have to be performed on a specific dossier. These messages are normally distributed to users automatically by the ePHOENIX messaging system, but they can also be transferred from the Team Mailbox by the user`s manager, or the user can transfer them from the Team Mailbox. In rare cases, a colleague can forward a message to the user.

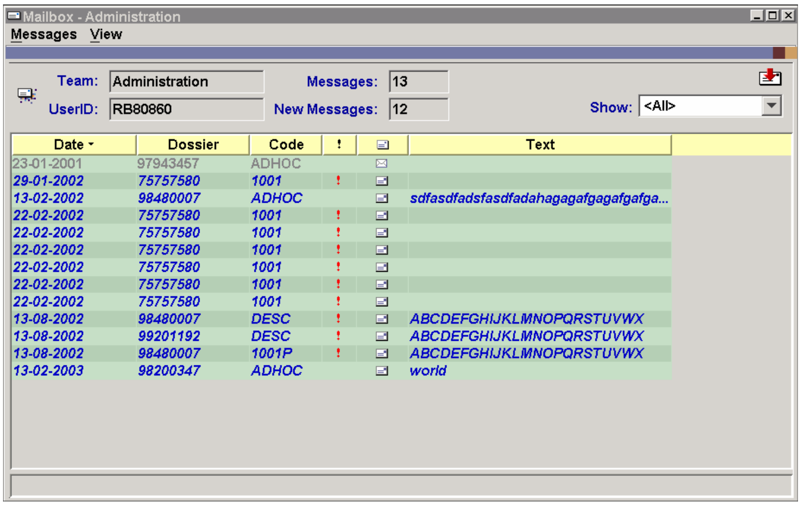


Figure 5: mailbox

By default, the Mailbox fills about one third of the MADRAS screen.

The user can also change the widths of the columns in the list of messages by dragging the borders between the column headings to the left or right, until the columns have the required width. The Mailbox remembers the widths next time it is opened.

5.3 Access to mailboxes

5.3.1 Overview

When the user first opens the Mailbox, they see their default Mailbox. If the user works in more than one team, one of these is always the default.

5.3.2 Viewing the Team Mailbox

To see the Team Mailbox choose **Unassigned messages...** from the **Messages** menu.

5.3.3 Changing a user`s Mailbox in another team

Many people are members of more than one team. To change a user`s Mailbox to another team:

- either choose **Select Team** from the **View** menu in the Mailbox
- or choose **Select Team** from the **MADRAS** pop-up menu in the Taskbar
- or press F11.

If more than one team is shown, select the desired team and click on **OK**.

5.3.4 Changing a user`s default Mailbox

The user can change their default team so that a chosen team is displayed on opening the Mailbox:

- either choose **Select Team** from the **View** menu in the Mailbox
- or choose **Select Team** from the MADRAS pop-up menu in the Taskbar.

Select the team to be the default team from the **Default Team** drop down list,.

5.4 The Mailbox window

5.4.1 Mail status icon

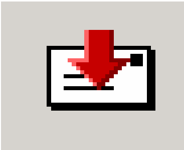


Figure 6: mail status icon

The Mail status icon is situated near the top right of the screen. When new mail has arrived, a red arrow points at the letter.

5.4.2 Menus

There are two menus in the Mailbox:

- **Messages**: The user also see the messages menu by selecting messages with the mouse and then clicking with the right mouse button. Another way to display this menu is to press the **F10** key while using the Mailbox.
- **View**

Messages menu		
Function	**Shortcut**	**Description**
Open Message	Ctrl+O	Open message.
Close Message(s)	Ctrl+C	Close message(s).
Forward Message...		Forward a message.
Reply Message...		Reply to a message.
Delete Message		Delete message(s).
Print/close		Print document for non-PHOENIX file.
Print Mailbox		Print the current mailbox in a fixed format.
Print Paperfile...		Pre-fill dossier numbers in paperfile print function.
Refresh Mailbox Messages		Refresh mailbox (view new messages).
Get Legacy Data		Get legacy data for selected messages.
Messages for all Teams...		View messages for all teams of which the user is a member.
Unassigned Messages		Open Team Mailbox (view unassigned messages).
Exit		Close Mailbox.

View menu		
Function	**Shortcut**	**Description**
Select Team		View Select Team dialogue to access mailboxes in other teams of which the user is a member.
Team Overview		View an overview of messages in all teams of which the user is a member.
Refresh Team Overview		Refresh the Team Overview information.

5.4.3 Message display

The Mailbox collects all the outstanding messages for the user`s team membership and displays them in a list. The user can define the sequence of headings and the sorting of the messages by choosing **Phoenix Settings** in the **MADRAS** menu..

At the top of the mailbox are shown:

- the mailbox name (Team)
- the user`S User ID
- the number of messages in the Mailbox
- the number of new messages.

For each message there are the following default headings:

- Date of message creation
- Application number
- Leading document code, which is the DocCode of the first document of the package
- Priority
  - High,
  - Medium
  - Low
- Status
  - Unopened (not yet processed by anyone)
    Open
    Pending (previously processed but not completed)
    Forwarded
    Closed (completely processed but can be reopened or deleted)
- Text, which is text added during indexing, rerouting or forwarding.

If the user points with the mouse at a message, the full text is displayed at the bottom of the Mailbox window.

The status and priority of messages are displayed as icons to save space.

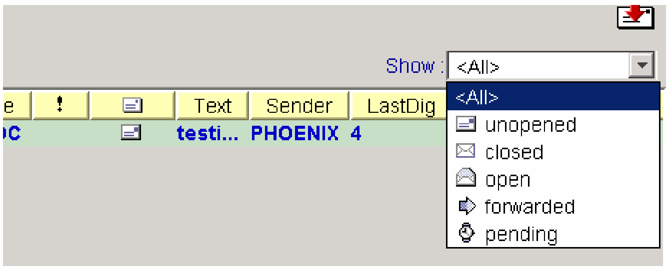


Figure 7: message icons

Message icons	
Icon	**Meaning**
Grey exclamation mark	Medium priority
Red exclamation mark	High priority
No mark	Low priority
Letter with address facing the user	Unopened Status
Open envelope	Open Status
Closed envelope	Closed Status
Watch	Pending Status

5.4.4 Team view of messages

To get an overview of all the messages the user has for all the teams of which they are a member, choose **Team Overview** from the **View** menu of the Mailbox.

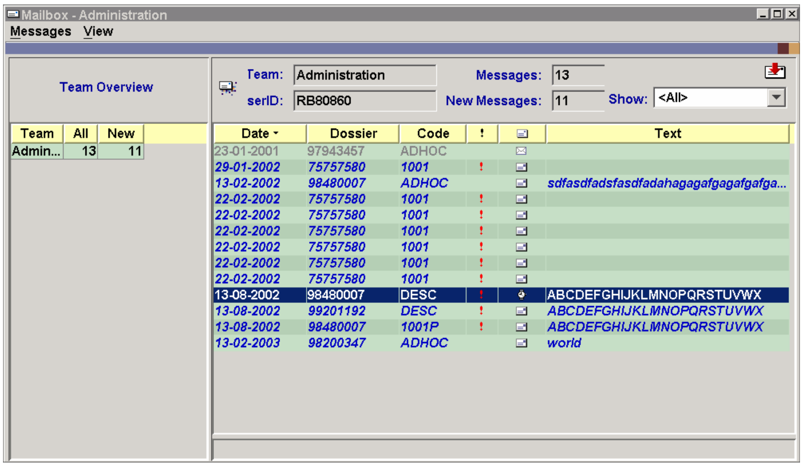


Figure 8: team view of messages

This displays the

- number of messages for each team of which the user is a member
- number of new (that is, unopened or forwarded) messages for each team

To hide the Team Overview, choose **Team Overview** from the **View** menu again.

To refresh the Team Overview window with any changes, choose **Refresh Team Overview** from the **View** menu.

5.4.5 Filtering by status

The user can filter the contents of the Mailbox by status. Select the status in the **Show:** drop down list at the top right of the Mailbox. This is set to <All> by default.

This list also shows the meanings of the symbols used for Status.

5.4.6 Other mailbox headings

There are additional Mailbox headings that the user can display. Choose **Phoenix Settings** from the **MADRAS** menu or press F12.

Additional Mailbox headings	
Heading	**Meaning**
• Sender	
• Team	
• Print status	
• Last digit	Displays last digit of application number
• Last 2 digits	Displays last two digits of application number
• Print/Cls.	Print / Close allowed

5.5 Team Mailbox

The displays those messages assigned to the user`s team but not currently assigned to any member.

To view the Team Mailbox, choose **Unassigned messages...** from the **Messages** menu.

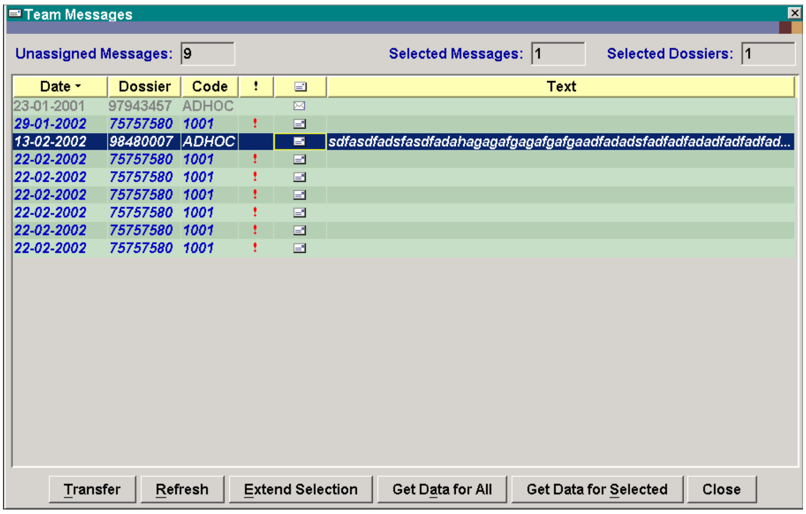


Figure 9: Team Mailbox

The Team Mailbox is similar to the user`s own mailbox. It has the following specific functions:

- The window displays the number of unassigned messages in the Team Mailbox, the number of messages the user has selected, and the number of dossiers corresponding to the selected messages.
- To assign messages to the user, select the message(s), then click on **Transfer**. (The user cannot assign messages to other persons.)
- To refresh the display, click on **Refresh**.
- To select all the messages that refer to the same dossier as the message the user has currently selected, click on **Extend Selection**.
- To retrieve legacy data for selected messages, click on **Get Data for Selected**. (Legacy data are not retrieved automatically.)
- To retrieve legacy data for all messages, click on **Get Data for All**.
- To close the window and return to the user`s own mailbox, click on **Close.**

5.6 Changing the Mailbox settings

5.6.1 Overview

The Phoenix Settings tool allows the user to change various aspects of the appearance of theirMailbox: the columns and the order they are displayed in, the default sorting of the messages, the way the Sender information is displayed for a message, and the colours used to display the message details.To change these:

- choose **Phoenix Settings** from the **MADRAS** Menu.
- select the **Mailbox** tab.

Note:

The user can define different settings for each team and therefore the user must do this separately for each team in which they are defined.

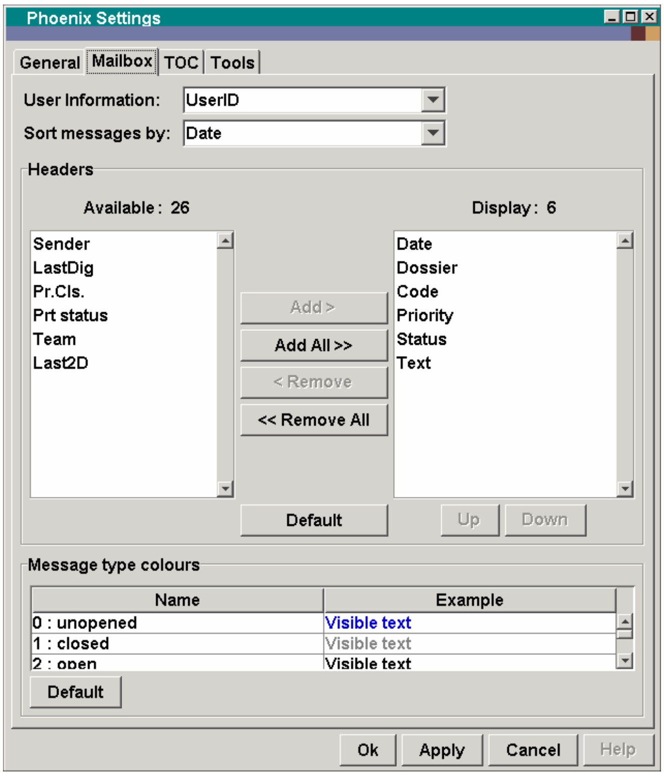


Figure 10: Mailbox settings

5.6.2 Column headings

To select headings and the order in which they are displayed:

- select the required heading from the list of available headings.
- click on **Add** to add it to the list of displayed headings or click on **Add All** for all possible columns to be displayed.
- select an item and click on the **Up** and **Down** buttons to move the heading into the required position in the list. Repeat for other headings until they are in the required order. The heading at the top of the list is displayed on the left of the mailbox window.

To remove columns from the display in the Mailbox:

- select the heading(s) to be removed from the Display list.
- click on **Remove** to remove the heading(s) from the Mailbox.

To return to the default option, click on **Default** at the bottom of the heading lists.

5.6.3 Sort order of messages

To change the default order in which messages are sorted, select the heading from **Sort Messages by** drop-down list. The messages are then sorted by this heading. The user is strongly recommended to set this to **Date**.

5.6.4 Sender information

To alter the default way in which sender information is displayed in the Mailbox, select the option (*User ID, Full Name* or *User ID and Full Name*) from the **User Information** drop-down list.

The user can change the order of messages displayed in the user`s mailbox temporarily, This does not change the default sorting.

5.6.5 Display colours

Message details in the Mailbox are displayed in different colours depending on the status of the document. The user can change these colours if they wish.

Under **Message Type Colours**, click on the document type that it is wished to change the colour for.

The **Pick a Color** window appears. This has three tabs, **Swatches**, **HSB** and **RGB**. These offer three ways to choose the desired colour.

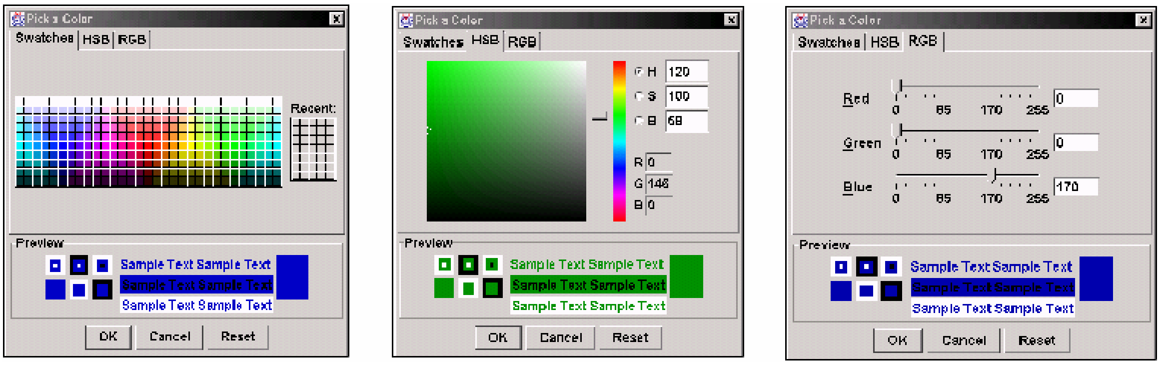


Figure 11: Pick a Color tabs

To change the colour:

- in the Swatches tab, click on the prefered colour sample.
- in the HSB tab, click on the colour, or drag the slider up or down, or type the appropriate numbers for hue, saturation, and brightness.
- in the RGB tab, drag the sliders for red, green and blue to the appropriate values, or type in the appropriate numbers for red, green and blue.
- the preview change is displayed.
- when the desired colour has been chosen, click on **OK**.
- to reset the colours to the previous selection, click on **Reset**.
- to apply the new colour immediately to the display, click on **Apply.**
- to reset display colours to the default, click on **Default** in the **Message Type Colours** panel.

5.7 Organising the user`s Mailbox

The Mailbox settings determine how the user`s Mailbox looks by default. They may wish to reorganise their Mailbox..

5.7.1 Sorting the Mailbox

To sort the messages in the Maibox:

- click on the heading at the top of a column to sort the entries into order based on that particular heading.
- click again on the same heading to sort the entries into the reverse order.

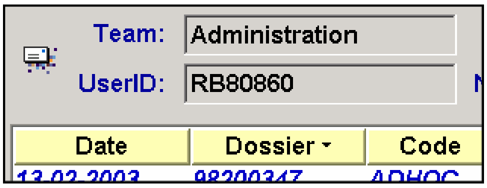


Figure 12: Mailbox sorting

A triangle• in the heading indicates that the entries are sorted on that heading. The direction of the triangle indicates the order of sorting.

The user can change the default sorting by choosing **Phoenix Settings** from the **MADRAS** Menu

Note

It is strongly recommend to use the default sequence: Date, with earliest date at the top.

5.7.2 Printing the Mailbox contents

To print the Mailbox contents choose **Print Mailbox** from the **Messages** menu.

5.7.3 Retrieving data from the user`s Mailbox

To retrieve data from legacy servers for specific messages:

- select the messages.
- from the **Message** menu, choose **Get Legacy Data**. The data is retrieved and displayed.

To select all messages in a large Mailbox, select the first message, then hold down the **Shift** key and press the **Page Down** key.

If the user has access to the Team Manager tool, the same mailbox headings are displayed as those chosen for their individual Mailbox.

5.7.4 Viewing messages in other teams

To check whether a user messages in other teams of which they are a member, click on Messages for all Teams in the Messages menu. Enter or change the selection criteria and press **Refresh Selection** to display the messages. If a user is a member of several teams this may take some time.

This window is for information only. To open the messages, users must change to the relevant Team Mailbox.

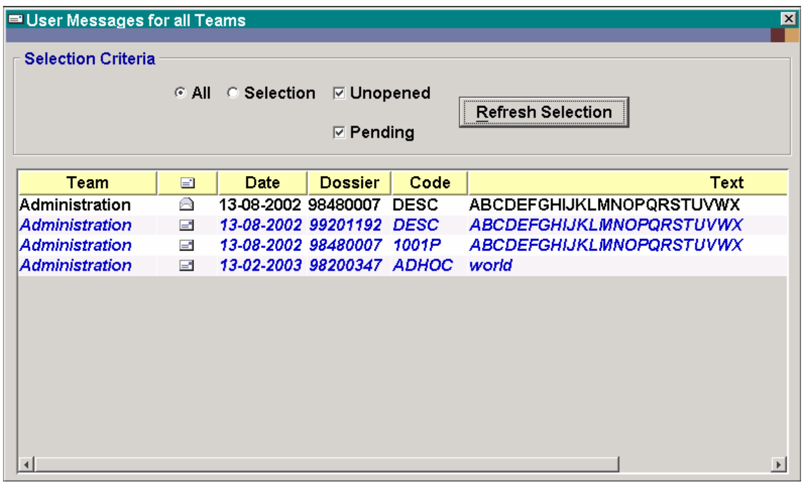


Figure 13: messages for all teams

5.7.5 Viewing messages by status

To view messages with different status:

- mark Selection.
- mark Unopened or Pending, as required.
- click on Refresh Selection.

To return to viewing all messages:

- check **All**.
- click on Refresh Selection.

5.8 Handling messages in the mailbox

Messages are handled using options on the **Message** menu.

There are also facilities to handle messages from the Dossier window.

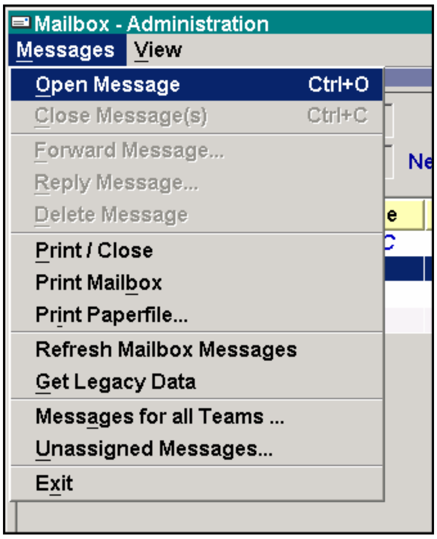


Figure 14: Mailbox administration

5.8.1 Opening a message

To open a message:

- double-click on the message in the Mailbox window
- or select the message and choose **Open** from the **Messages** menu
- or select the message, hold down the **Ctrl** key and press **O**.

If there are other messages for the same dossier, ePHOENIX displays a message: “There are n more messages for this dossier”, where n is the number of other messages. Click on **OK** to continue.

ePHOENIX opens the Dossier window containing the Dossier information and the Image Viewer. The History is updated with their UserID, the current date and the code from the message.

Note:

The user has updating rights only if they are the first person to access the dossier. If not, ePHOENIX advises the user that the dossier is locked for updates. Click on OK. The user now has read-only rights. This is reflected in the Read-Only caption in the dossier’s title bar, next to the patent application number and date of filing

5.8.2 Forwarding a message

To forward a message:

- highlight the message
- choose Forward Message... from the Messages menu.

This option is restricted by to users with the appropriate profile, which is set up by user administrators in the management tool. The user should normally forward messages only by prior arrangement with the recipient.

5.8.3 Close a message

The message must be in Pending status. To close a message:

- highlight the message.
- choose **Close Message(s)** from the **Messages** menu, or hold down the **Ctrl** key and press **C**.

5.8.4 Replying to a message

The message must be in Pending status.

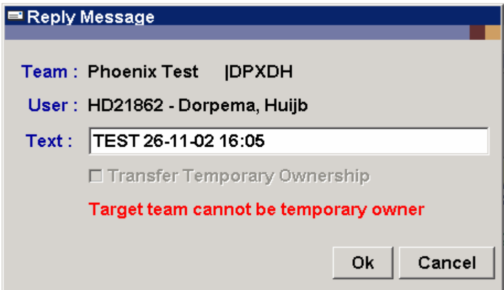


Figure 15: reply message

To reply to a message:

- select the message.
- choose **Reply** from the **Messages** menu.
- type in message text if necessary.
- tick **Transfer Temporary Ownership** if the user wishes to transfer ownership. **I**f the target team is one which cannot be a temporary owner, then this option is disabled.
- click on **OK**.

ePHOENIX sends the message back to the person who sent it.

Note

It is not possible to reply to a system generated message, and error message will be generated if this is attempted

5.8.5 Deleting a message

For messages to be deleted, they must have the status Closed.

- select the message(s)
- choose Delete Message from the Messages menu.

5.8.6 Creating an ad hoc message

In order to send a message to a colleague within ePHOENIX after opening a dossier ad hoc, choose **Create** from the **Message** menu in the Dossier. No temporary ownership is created by using this function.

5.9 Refreshing and closing the Mailbox

If the mailbox is closed during the day, all messages (including closed messages) are kept, and are still available in the Mailbox when re-opened.

5.9.1 Refreshing the Mailbox

To see newly arrived mail:

- choose Refresh Mailbox Messages from the Messages menu.
- the system redisplays the complete Mailbox including the newly arrived mail.

5.9.2 Closing the Mailbox

To exit the Mailbox:

- choose **Exit** from the **Messages** menu.
- or double-click on the letter icon at the top left of the Mailbox screen, and choose **Close**
- or click on the letter icon and choose **Close**.

6 Team Manager

6.1 Overview

The Team Manager allows managers to control members of the team and their profiles, and to route messages to members or other teams.

Access to the Team Manager is profile protected. Only designated managers have access to all the functionality, whilst other profiles may have the authority to assign messages but not to edit member details. The following details assume that the user has the necessary access permissions.

It is strongly advised that the user familiarises themself with the Mailbox before using the Team Manager. Some Mailbox functions are also available through the Team Manager.

Most ePHOENIX users have access to the Team Mailbox through the **Unassigned Messages** function of the **Messages** menu in the Mailbox..

6.2 Opening Team Manager

To open the Team Manager:

- Click on **Team Manager** in the **MADRAS** menu.

This opens a window showing the Unassigned Messages (Team Mailbox) in the upper half, and the details of Team Members in the lower half.

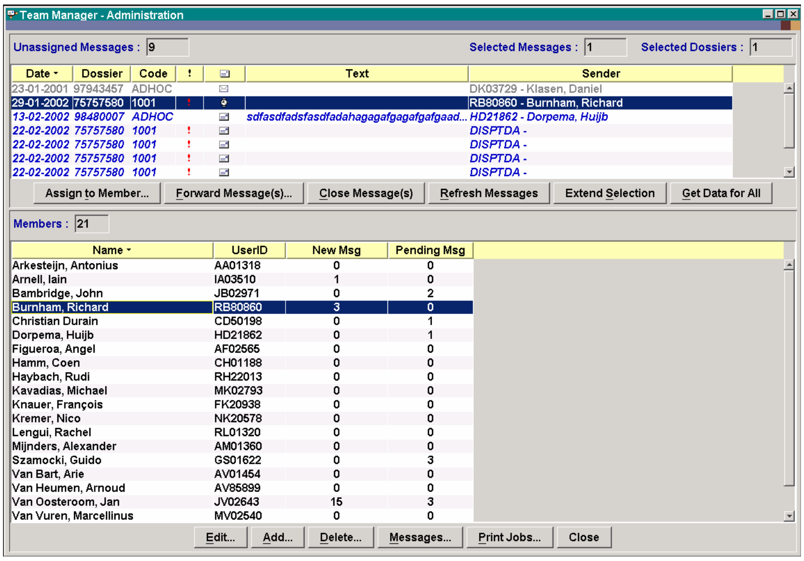


Figure 16: team manager - administration

The user can change the width of the columns by dragging the borders between the headings. They can also sort either the messages or the members by clicking on the desired heading. This is similar to their own Mailbox.

6.3 Handling messages in Team Manager

Note

Please refresh the messages by pressing Refresh Messages immediately before assigning or forwarding messages, unless you have just opened the Team Manager.

6.3.1 Assigning messages to a team member

To assign messages:

- sort the messages as necessary in the Unassigned Messages part of Team Manager, for example, by date or code.
- select the message(s).
- in order to ensure that all messages for the selected dossiers are assigned, click on **Extend Selection**. Team Manager indicates both the number of messages and the number of dossiers selected.
- click on **Assign to Member...**
- select the team member.
- click on **OK**.

As soon as the messages are transferred, the workload of the team member at the bottom of the screen is updated.

6.3.2 Forwarding messages to another team

Messages should be forwarded to teams only by prior arrangement.

To forward messages:

- sort the messages as necessary in the Unassigned Messages part of Team Manager, for example, by date or code.
- select the message(s).
- in order to ensure that all messages for the selected dossiers are assigned, click on **Extend Selection**. Team Manager indicates both the number of messages and the number of dossiers selected.
- click on **Forward Message(s)...**
- select the team and, if necessary, member.
- tick **Transfer Temporary Ownership** if the user wishes to transfer ownership. **I**f the target team cannot be an owner, this option is disabled.
- click on **OK**.

6.3.3 Customising the Unassigned Messages

The headings and colours in the Unassigned Messages part of Team Manager are customised in the same way as for the user`s individual Mailbox The settings apply to both Team Manager and their own Mailbox.

6.3.4 Retrieving legacy data in the Team Mailbox

Legacy information is not retrieved automatically. The two ways to retrieve the information are:

- for individual messages:
    - select the message(s).
    - click with the right mouse button.
    - choose Get Data for Selected.
- for all messages:
    - click on Get Data for All.

The relevant data are then displayed. For teams with a large number of messages, this may take some time, so if the user needs data for a limited number of messages only, it may be advisable to use the previous option.

6.3.5 Transferring messages from one member to another

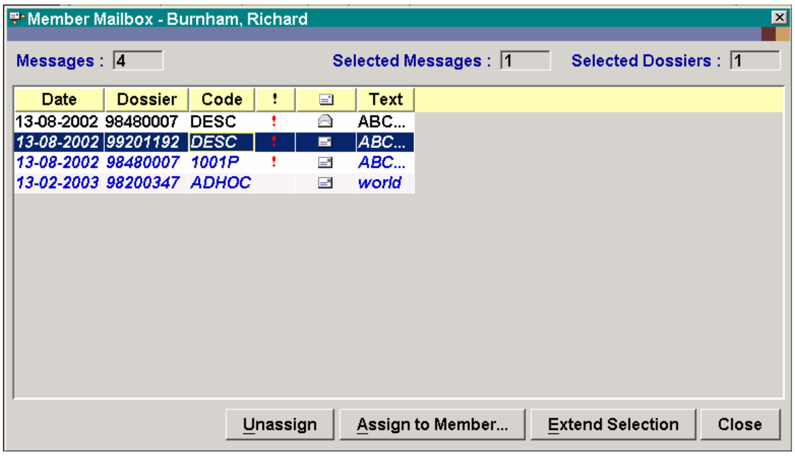


Figure 17: Member Mailbox

- in Team Manager, select the team member whose messages are to be transferred, and click on the Messages button. A list of messages in the selected mailbox appears.
- select one or more messages to be transferred, after sorting if necessary.
- to extend the selection to all messages for dossiers with selected messages, click on **Extend Selection**. It is advisable to do so before unassigning or reassigning messages.
- to return selected messages to the Team Mailbox click on **Unassign**.
- to transfer the messages directly to another team member:
  - click on Assign to member...
  - select the target member.
  - click on OK.
- When finished, click on **Close**.

6.3.6 Printing paper files from the mailbox

- Select the message.
- Click with the right mouse button.
- Choose **Print Paperfiles…** from the pop-up menu.

6.3.7 Printing/Closing

- Select the message.
- Click with the right mouse button.
- Choose **Print/Close** from the pop-up menu.

Note

This is only possible with restricted types of dossiers, if at all. An error message will appear if the selection contains dossiers not falling into this category.

6.3.8 Automatic distribution

ePHOENIX can distribute messages automatically to specific teams or users.

6.4 Team members

6.4.1 Adding a team member

- click on **Add...** in the Members part of Team Manager.

A dialogue pops up in which the properties of the new team member can be defined.

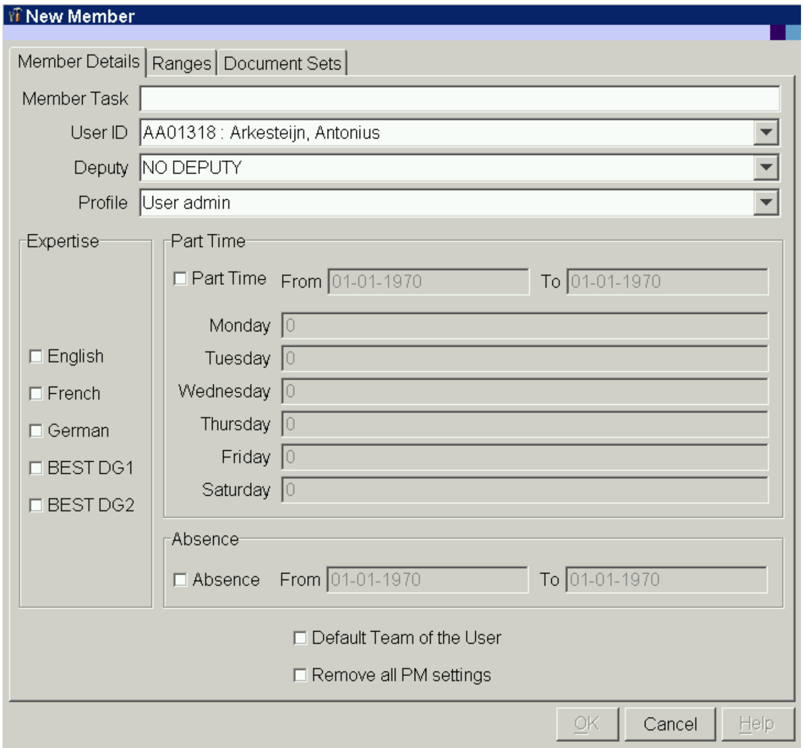


Figure 18: new member

- Fill in the details on the **Member Details** tab:

Member details	
Heading	**Meaning**
Member Task	The role of the member in this team. This entry is mandatory.
User ID	User ID and name. This entry is mandatory.
Deputy	The ID and name of the member's deputy, if any.
Profile	Select from list of Profiles. This entry is mandatory.
Expertise	The entries here depend on the Office. Select the appropriate values for this member.
Part Time	If the member is part-time, select this option. Enter the period during which this applies in the format dd-mm-yyyy. Enter a long date range for a permanent part-time User. Also enter the member's hours, in the format hh:mm-hh:mm
Absence	If the member is absent for a period, select this option. Enter the period during which this applies in the format dd-mm-yyyy.
Default Team	If this is the member's default team, select this entry. When the member logs in, the Mailbox displayed will be the member's mailbox in this team.
Remove all PM settings	Not used.

- click on **OK** to save the details of the new team member, and update the database.
- click on **Close** to return to the Team Manager window.

This window also enables the user to define the Ranges and the Document Sets in accordance with the member's expertise..

6.4.2 Changing the profile of a team member

- select the member i in the Members part of Team Manager
- click on **Edit...** A window pops up in which the properties of the team member can be changed
- change the profile as required. See section **Error! Reference source not found.** for more details
- click on **OK** to save the details of the team member and update the database
- click on **Close** to return to the Team Manager window.

6.4.3 Deleting a team member

- select the member in the Members part of Team Manager,.
- clicki on **Delete...**
- click on **Yes** to confirm the deletion. The member is immediately deleted and any message still allocated to the team member is automatically returned into the unassigned mailbox of the team.
- click on **OK** to update the database.
- click on **Close** to return to the Team Manager window.

6.4.4 Viewing print jobs

To see the current pending print jobs for a team member:

- select the team member in Team Manager.
- click on **Print Jobs**.
- the Print Jobs window i appears.

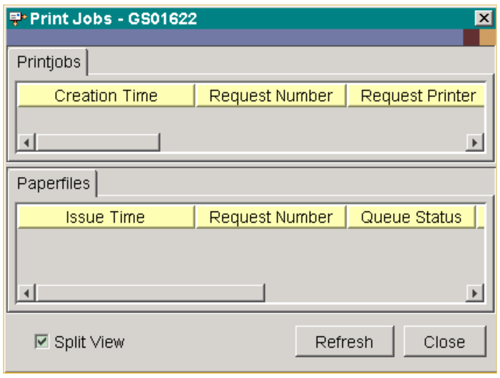


Figure 19: print jobs

- tick **Split View** to view both Print Jobs and Paperfiles at the same time.
- remove the tick to view Print Jobs and Paperfiles on separate tabs.
- either click on **Refresh** to refresh the display or click on **Close** to close the Print Jobs window.

7 Dossiers

7.1 Opening dossiers

The dossier tool, together with the viewer, is the main tool for working with a dossier in MADRAS.

7.1.1 Opening a dossier from the Mailbox

This is the way in which a user will normally open dossiers.

7.1.2 Opening a dossier ad hoc

Whilst the daily workload in ePHOENIX is governed largely by the receipt of messages, the user may need to open a dossier ad hoc, for example, when they receive a telephone call.

When they make an ad hoc request, no images are loaded in the Viewer unless they have not previously been viewed.

To open the dossier:

- click on **Dossier** in the MADRAS menu
- or press the **F2** key
- or hold down the **Ctrl** key and press **O**
- or, in an already open dossier, choose **Open** from the Dossier menu.

The Open Dossier window appears.

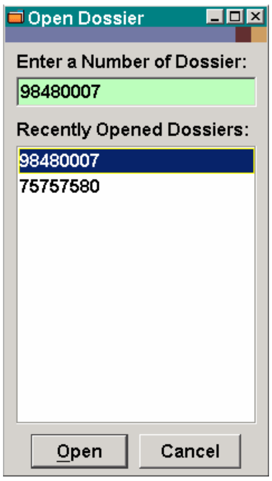


Figure 20: open dossier

- In the Open Dossier window, type in the dossier number or select it from the list.

  If a dossier number is entered by hand, the entry field turns green when ePHOENIX recognizes the number as valid.

  The dialogue box stores a list of the most recently opened dossiers. To open one of these listed dossiers:
  - either select it, and click on **Open**
  - or double-click on the number.
- The requested dossier is retrieved and displayed. An image may also be displayed in the Image Viewer.

There are several tabs in the Dossier window. By default, the one that is displayed when the user opens the dossier is the cover.

7.2 Using the Dossier Tool

The Dossier tool enables the user to retrieve information from and add information to an ePHOENIX dossier.

When the user open a dossier, status and other data from legacy systems are up to date. However, any subsequent updates are not shown automatically.

Many users can access a dossier simultaneously, but only the first to open the dossier can update it. If the user tries to update a dossier already being accessed by somebody else, ePHOENIX displays a warning message:

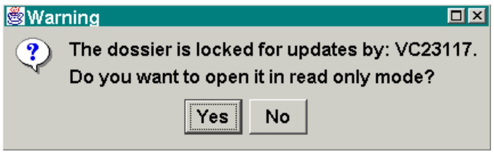


Figure 21: warning

The user must click on **Yes** to continue.

All users can continue working in the dossier, but updates can be made only by the first person to open the dossier. To remind the other users, READ-ONLY is displayed on the dossier title bar. The other users can still make updates to legacy systems.

It can sometimes happen that a dossier is not closed properly when ePHOENIX is closed. In this case the dossier remains locked for updates for about 2 hours. If the user urgently requires to make an update, try asking a colleague to open and close the dossier normally. If this is not possible, contact the Support Desk.

The user can work on more than one dossier at a time; to make this easier they can minimize or resize dossier window

7.3 Dossier settingst

7.3.1 Temporary changes

Some parts of the Dossier Tool contain columns of data, for example, the Table of Contents and the History.

A user can change the width of these columns by dragging the borders between the column headings to the left or right. The Dossier remembers these settings.

In the case of multiple Dossiers being given, the remembered settings are those of the last closed dossier. It is advisable to make changes to the width of columns only when a dossier is open, and then close the dossier.

A user can also change the order of the columns by dragging the headings themselves to the left or right. The Dossier Tool does not remember these changes after the user closes it.

7.3.2 Changing default settings

A user can customise some of the default settings in the Dossier Tool. They must customise their settings separately for each team of which they are a member.

Choose **Phoenix Settings** from the MADRAS menu.

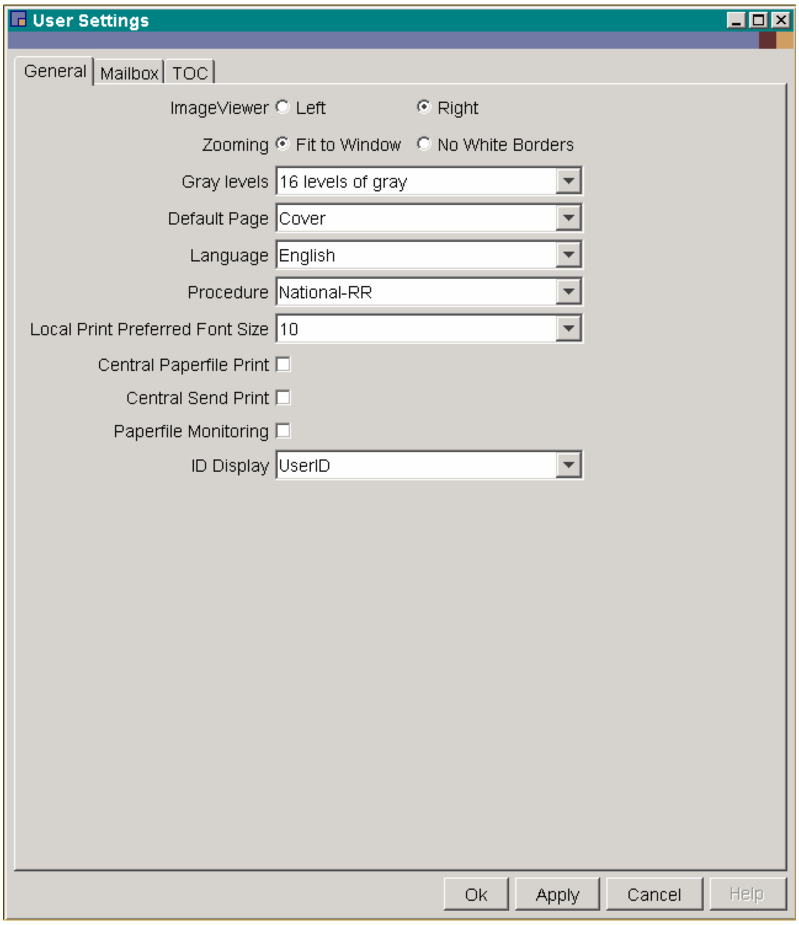


Figure 22: ePHOENIX user settings

Select the **General** tab and then select from the options offered.

General tab	
Heading	**Meaning**
Image Viewer	Choose whether Image viewer is on the left or the right.
Zooming	A setting for the Image Viewer.
Grey levels	A setting for the Image Viewer.
Default page	This is the tab displayed when the Dossier Tool is opened. This can be Cover, TOC, History or Checklist. We strongly recommend the user to keep the Cover as default, so that annotations and labels are always seen.
Language	Defines the language of document descriptions in the Dossier Tool.
Procedure	Sets the default procedure that is selected when a user opens a dossier.
Local print pref.	Defines the font size for printouts on the desktop printer (only for mailbox and TOC printouts, not PDSs).
Central paperfile print	Sets the central printer as default for paperfiles.
Central SEND print	Sets the central printer as default for SEND output
Paperfile monitoring	Sets paperfile monitoring to ‘on’: see section.
ID display	User ID, name or both to display in the Mailbox

If a user wants first to see what the new layout will look like, click on **Apply**. ePHOENIX immediately applies the new setting. Drag the window if necessary.

Click on **OK**.

7.4 Dossier tabs

7.4.1 Tabs table

t

Dossier tabs	
Tab	**Meaning**
Cover	At-a-glance dossier information (procedure-related). This is the default
TOC	Table of Contents: a list of all documents (normally procedure-related)
Checklist	Checklist of items treated (procedure-related; not present in all procedures)
Status	Status screens with legacy data for this patent application (procedure-related; not present in all procedures)
Structure	Dossier structure: shows procedures and participants
History	History of access to the dossier

7.4.2 Dossier access list

At the top of the Dossier window there is a box displaying the name of the current screen.

Click on the arrow at the right of the box to see a drop-down list. This list shows which screens have been viewed in the current dossier.

The user can return to any of these screens. Click on the name of the screen in the list to return to that screen.

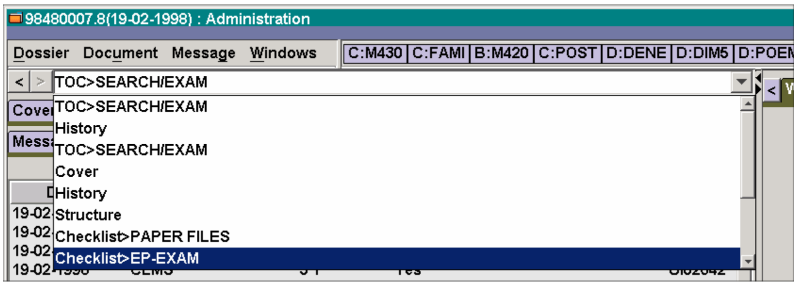


Figure 23: dossier access list

7.5 Cover

7.5.1 Overview

The t cover is the default tab in the dossier, and is intended to convey the same kind of information as the cover of a paper dossier.

It displays:

- basic dossier-related information
- a panel for labels and dossier annotations
- temporary or permanent ownership of the dossier.

It is strongly recommended that the user keeps the cover as the default view.

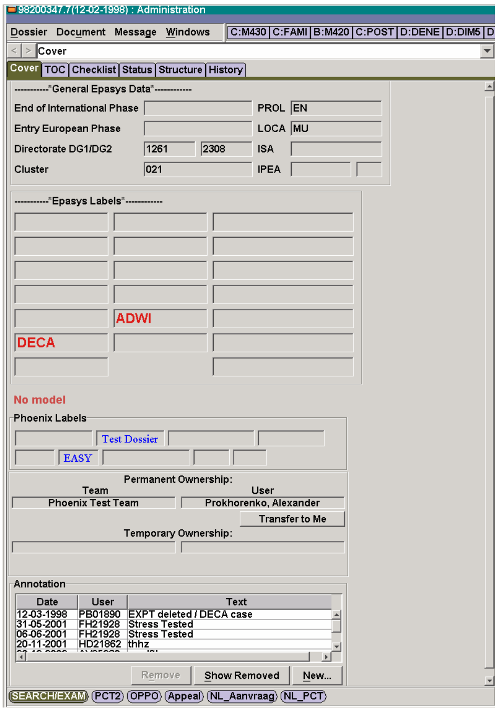


Figure 24: cover tab

7.5.2 Labels

Labels are linked to the procedure, that is, what the user sees on the Cover depends on the procedure. Most labels are generated automatically when a related coding is made in a legacy system. If the coding is date-dependent, the information is displayed only on relevant dates.

Each label appears in its own box. To see which label corresponds to each box, point the mouse at the box.

7.5.3 ePHOENIX labels

In addition to the automatic labels, a number of ePHOENIX labels can be manually set, depending on the procedure the user is in.

To set a label:

- position the mouse **outside** the label boxes, but within the Phoenix Labels panel
- click with the right mouse button
- select the required label with the left mouse button.

To delete manual labels, use the same procedure.

7.5.4 Dossier annotations

There is a space at the bottom of the cover for dossier annotations. The system always shows current (valid) annotations in chronological order with the fields:

- date
- user ID
- text

If some of the annotations and/or text are not visible, scroll by clicking in the scroll bars at the bottom and right of the Annotations space.

7.5.5 Remove annotations

If an annotation is no longer valid, it can be removed by:

- selecting the annotation in the list.
- clicking on the **Remove** button.

7.5.6 Restoring annotations

Removed annotations are not displayed, but they are still recorded in the system. To view removed annotations, click on **Show Removed**.

If an annotation has been removed in error, it can be restored:

- Display the removed annotations using **Show Removed**.
- Select it in the list of removed annotations.
- Click on **Put Back**.
- To display the list of valid annotations again, click on **Show Valid**.

7.5.7 Creating new annotations

To create a new annotation:

- Click on the **New** button at the bottom of the Annotation space. The New Annotation window pops up.
- Enter a new annotation in the Text field.

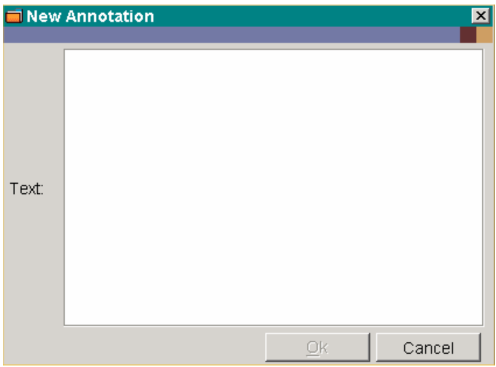


Figure 25: new annotation

Click on **OK** to save the annotation.

The system displays the new annotation together with ‘Now’ as the date and the user`s userID. It appears at the top of the list. After the user closes or saves the Dossier (**Close** or **Save** on the Dossier menu), the annotation has the real date and appears at the bottom of the list.

Please keep annotations short, as otherwise the whole text cannot be seen without manipulation.

7.6 Ownership of a dossier

The cover page displays t whether there is an owner, the type of ownership and the owner's name and team.

7.6.1 Temporary ownership

The temporary owner of a dossier is normally the team or team member whose mailbox contains the currently pending messages. All new messages relating to this dossier are routed directly to the temporary owner.

7.6.2 Permanent ownership

Permanent ownership of a dossier can also be defined on an ad hoc basis. The user may want to become the permanent owner if the dossier the user is treating would normally be distributed to somebody else, for example, when handling a difficult case such as a request for a decision. The user cannot transfer ownership to another person.

To transfer permanent ownership to the user:

- select the **Cover** tab.
- click on **Transfer to me** in the Permanent Ownership section.

The user becomes the permanent owner of the dossier and will receive all future documents (except documents having special distribution rules) until permanent ownership is removed.

To remove permanent ownership click on **Release** in the Permanent Ownership section.

7.7 Table of contents (TOC)

7.7.1 Overview

t The TOC provides an overview of all documents filed for a patent application. From the TOC the user can:

- view and sort a list of documents in the dossier
- view and edit document details
- view and annotate the documents
- add new documents to a dossier
- print, stamp or send documents
- join and split documents
- move or clone documents to another folder
- copy documents to another dossier

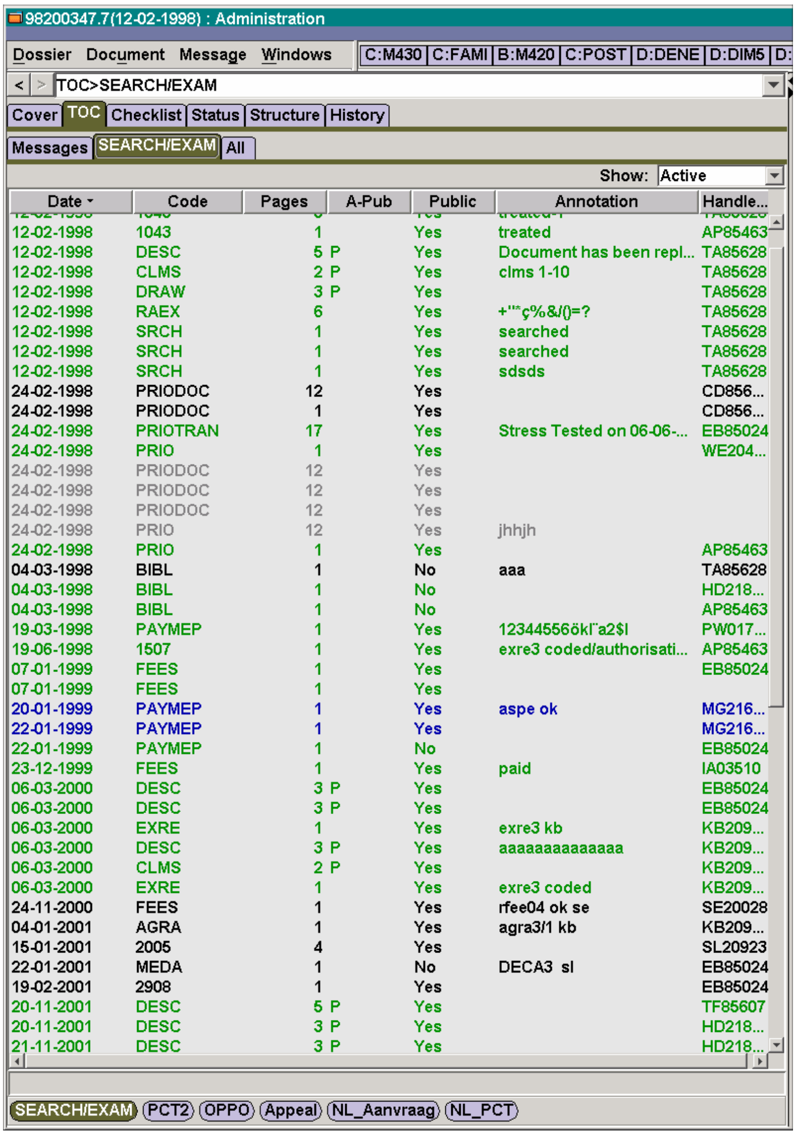


Figure 26: table of contents

The user can access TOC functions through the Document menu of the Dossier. To access this menu either click on **Document** in the Application Manager menu bar or click on the right mouse button with the cursor in the TOC. Most menu items are not available unless one or more documents are highlighted.

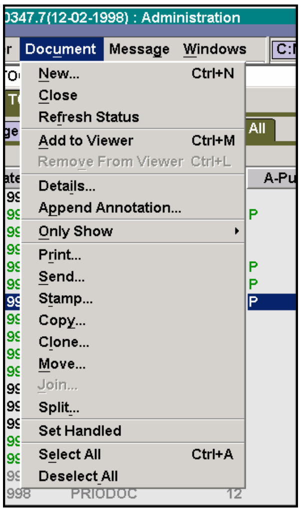


Figure 27: dossier document menu

7.7.2 Information displayed in the TOC

The TOC displays a listed inventory of the dossier's current contents. Each row in the list pertains to a single document.

TOC inventory list	
(*) indicates that item can be updated.	
Heading	**Meaning**
Legal date	(dispatch or receipt)
DocCode (*)	
Number of document pages	
Related procedure (folder) (*)	
Status settings	
Scanned	(date)
Public document (*)	Yes or No
To be sent to Publisher (*)	Y, N or R
Sent to Publisher	(date)
User ID of the person who viewed the document the first time	
Related group (*)	
Indication of incoming, outgoing or internal document	
Package number within the dossier	
DocCode description	The DocCode description can be updated through the DocCode function in the Management Tool (restricted function)
Document annotation (*)	
Physical Package sequence number	
Logical sequence number within the package	

7.7.3 Changing the TOC settings

The user can change the headings (columns of data), the sequence of headings and the sorting of data in the user`s TOC.

The user must do this separately for each team of which they are a member.

7.7.3.1 To display the Phoenix Settings window

Choose **Phoenix Settings** in the MADRAS Menu or press F12..

Select the **TOC** tab.

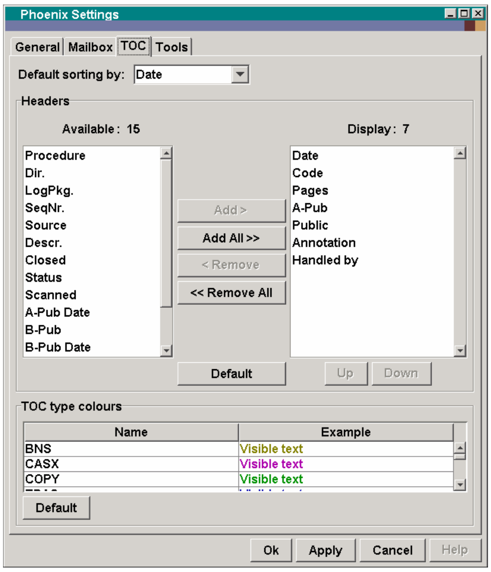


Figure 28: PHOENIX settings

7.7.3.2 To display more headings

In the **Phoenix Settings** window, on the left is a list of possible headings to be displayed in the TOC. Select a heading from the list of available headings.

To add this heading to the list of displayed headings, click on **Add**.

To add all the headings to the user`s display, click on **Add All**.

Repeat for all the headings required.

If too many headings are selected they will not all be displayed in the TOC, because of lack of space, and the userwill have to scroll horizontally to see all the information.

7.7.3.3 To display fewer headings

On the right of the **Phoenix Settings** window, is a list of headings currently displayed in the TOC.

Select the heading to remove. To remove this heading from the list of displayed headings, click on **Remove**. To remove all the headings from the display, click on **Remove All**. Repeat for all the required headings.

7.7.3.4 To change the sequence of headings

The heading at the top of the list of displayed headings is the one that appears on the furthest left of theTOC.

Select the heading in the **Phoenix Settings** window to be moved.

Click on the **Up** or **Down** button until the heading is in the correct place in the list.

Repeat for all the headings to be moved.

7.7.3.5 To return the headings to the recommended selection and order

In the **Phoenix Settings** window, click on **Default** under the Headers pane.

7.7.3.6 To change the sorting of data in the columns

Select the heading In the **Phoenix Settings** window, in the **Default Sorting By** drop-down list, on which the contents are to be sorted. This is not reset by the Default button.

7.7.3.7 Changing display colours

Documents in the TOC are displayed in different colours depending on the source of the document. The user can change these colours if they wish.

There is a pane called **TOC type colours** in the **Phoenix Settings** window,. Click on the document type to change its colour.

The Pick a Colour window appears. This has three tabs, Swatches, HSB and RGB. These offer three ways to choose the colour.

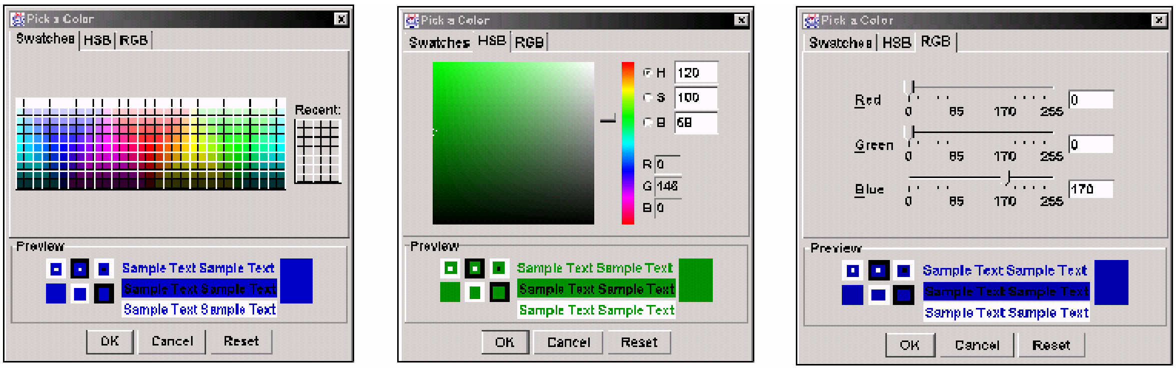


Figure 29: change display colours

To change the colour:

- in the Swatches tab, click on the colour prefered sample.
- in the HSB tab, click on the prefered colour, or drag the slider up or down, or type the appropriate numbers for Hue, Saturation and Brightness.
- in the RGB tab, drag the sliders for Red, Green and Blue to the appropriate values, or type the appropriate numbers for Red, Green and Blue.

The preview willchange.

When the colour has been chosen, click on **OK**.

To reset the colour to the colour previously set, click on **Reset**.

To apply the new colour immediately to the display, click on **Apply.**

7.7.3.8 To reset display colours to the default

Click on **Default** in the **Phoenix Settings** window under the TOC Type Colours pane.

7.7.4 Viewing documents by pocedure

Documents are placed into procedural folders according to their document code. To see documents that are only in a particular procedure, click on the tab for that procedure at the foot of the TOC window.

All the tabs at the top of the window then belong to that procedure in which the user is working, apart from Message, History and Info, which are dossier-related.

If a user normally works in a single procedure, for example, the Search/Exam procedure, they can set this as default in the user`s Phoenix Settings so that dossiers always open in this procedure.

To see all documents in the dossier, click on the **All** tab in the TOC. This is the default.

In certain procedures, such as Opposition, there is also a tab **All/Proc** for all documents for all participants in that procedure.

7.7.5 Viewing documents by Message

If the user has opened the dossier through a message, the TOC contains a **Message** tab showing only those documents associated with the message and a list of all currently unopened and pending messages for the dossier.

To see all documents belonging to the dossier, select the **All** tab.

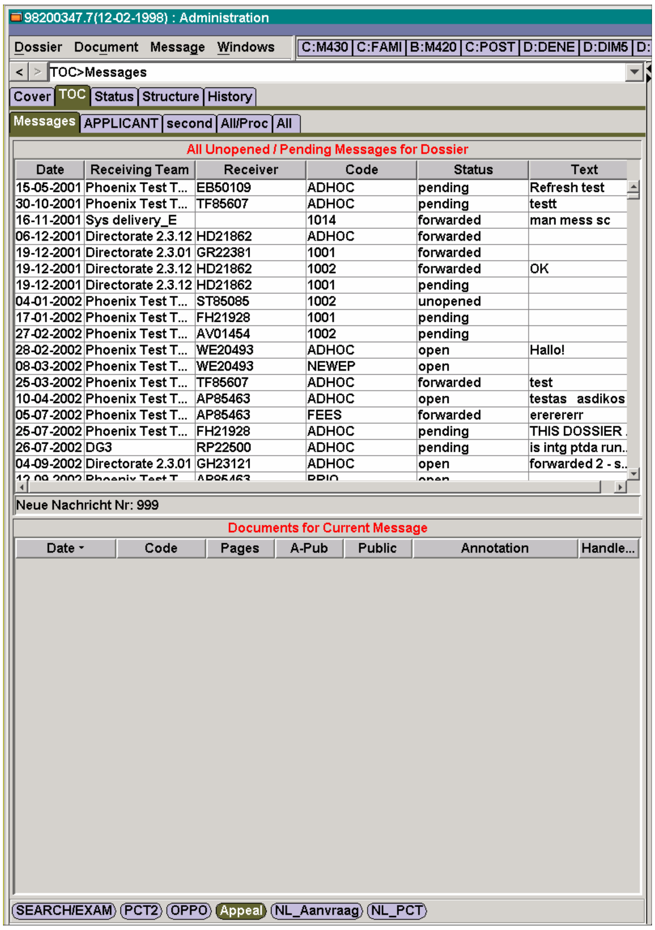


Figure 30: viewing documents by message

7.7.6 Viewing documents by status

To display documents with a particular status either select **Only show...** from the **Document** menu or select the option from the drop down list in the **Show** window at the top right of the TOC.

7.7.7 Sorting the TOC

To sort the entries in the TOC:

- click on the heading bar at the top of a column to sort the entries into order based on that particular heading.
- click again on the same heading bar to sort the entries into the reverse order.

A triangle • in the heading bar indicates that the entries are sorted on that heading. The direction of the triangle indicates the order of sorting.

The user can define the default sorting by choosing **Phoenix Settings** from the MADRAS Menu, then going to the TOC tab. We strongly recommend using the default, which is Date sequence with earliest date at the top.

7.7.8 Document details

7.7.8.1 Viewing and changing document details

Documents are identified by their document code or DocCode. A DocCode summarizes various attributes of the document, some of which may change. It is very important to update document details when circumstances change, to ensure that ePHOENIX carries out certain automated functions, such as printing paper files and publication, and to provide other ePHOENIX users with reliable data.

Select the document in the TOC.

Choose **Details...** from the **Document** menu. The Document Details window appears. It displays the data associated with the document in a series of tabs.

7.7.8.2 General tab

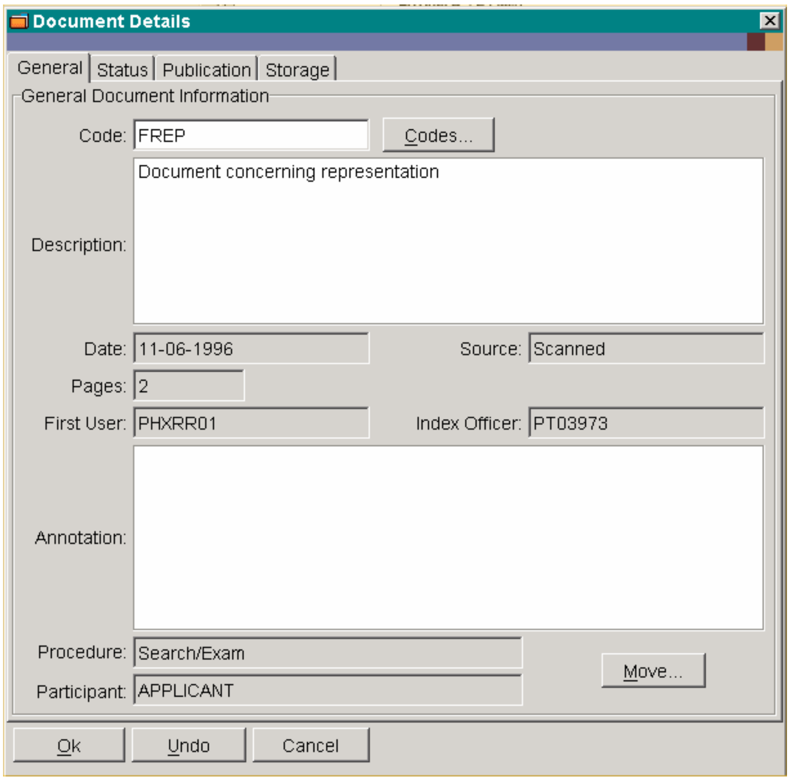


Figure 31: general tab

<table>
<tr><th colspan="2">General tab</th></tr>
<tr><th colspan="2">(*) indicates that item can be updated.</th></tr>
<tr><th>Field</th><th>Content</th></tr>
<tr><td>Code (*)</td><td>Highlight the DocCode and overtype or use the Code Helper</td></tr>
<tr><td>Doc description</td><td>Display only. The language can be changed in the Phoenix Settings.</td></tr>
<tr><td>Date</td><td>Legal date.</td></tr>
<tr><td>Pages</td><td>Number of pages in this document.</td></tr>
<tr><td>Source</td><td>For example: scan, copy, or name of legacy system.</td></tr>
<tr><td>First User</td><td>User ID of the user who viewed the document the first time.</td></tr>
<tr><td>Index Officer</td><td>The person who indexed the document.</td></tr>
<tr><td>Annotation (*)</td><td>Document annotation.</td></tr>
<tr><td>Procedure (*)
and
Participant (*)</td><td>In order to change the Procedure and Participant, click on the Move button, and the Move Document(s) window pops up.

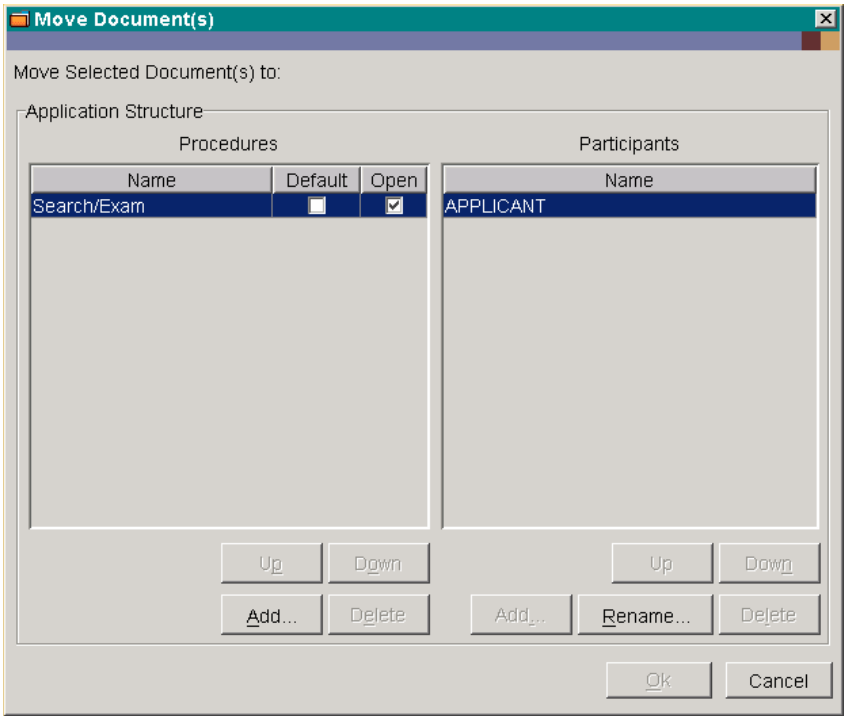


Figure 32: move document(s)

Select the desired target location (Procedure, Participants) and click on OK.</td></tr>
</table>

7.7.8.3 Status tab

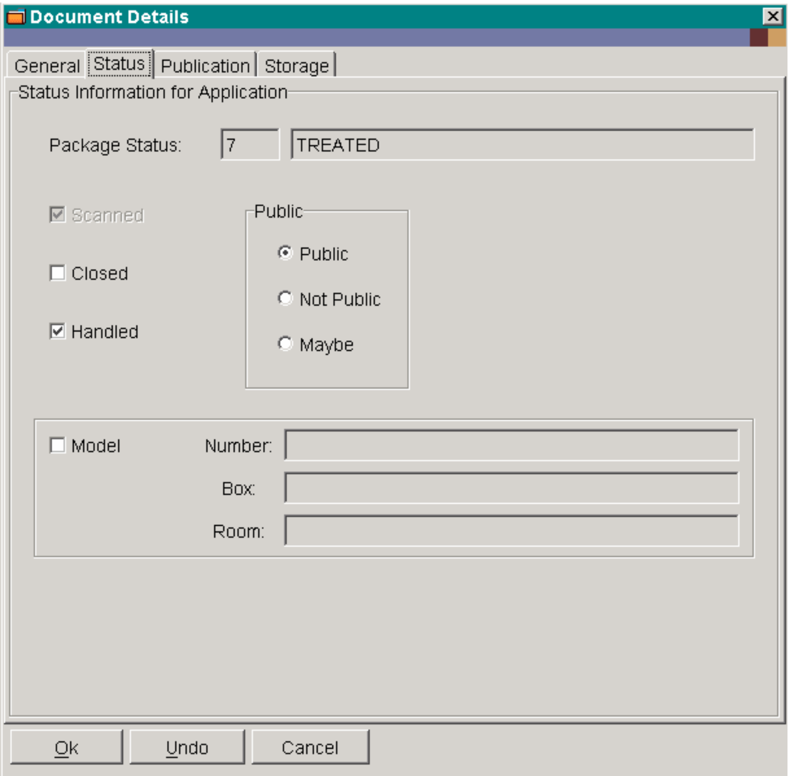


Figure 33: status tab

General tab	
(*) indicates that item can be updated.	
Field	**Content**
Package Status	Display only.
Scanned	Display only; indicates that the document has been scanned.
Closed (*)	Click to update. Documents can never be deleted, only closed.
Public (*)	Click to update. Maybee is not used.
Handled (*)	Click to add the user`s User ID.
Model (*)	Click to indicate whether a model is filed. If not, the following items do not apply.
Number (*)	Type in number of model.
Box (*)	Type in the box number where the model is stored.
Room (*)	Type in the room number where the model is stored.

7.7.8.4 Publication

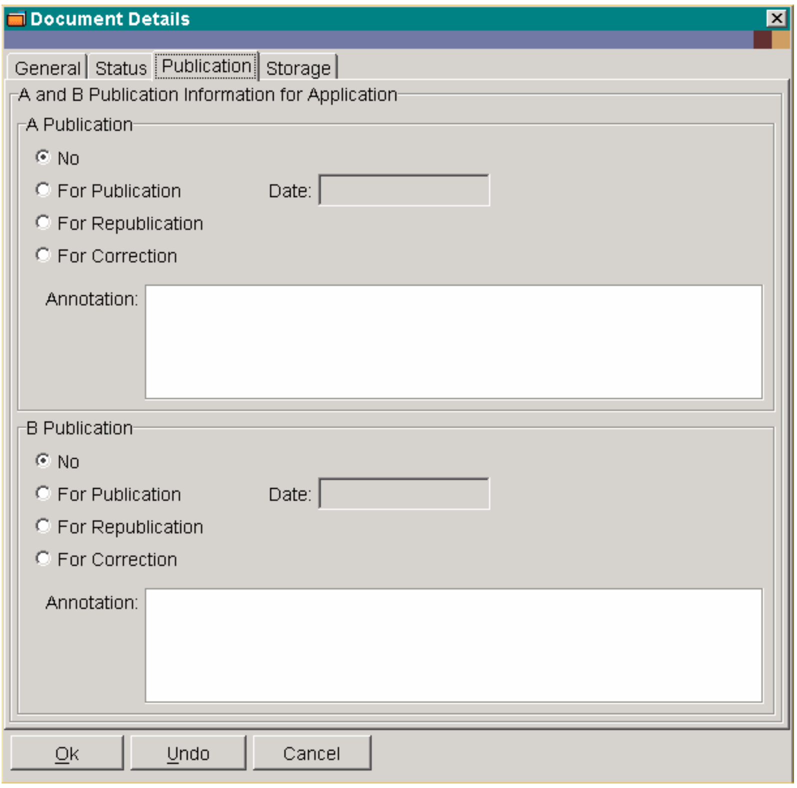


Figure 34: publication tab

General tab	
(*) indicates that item can be updated.	
Field	**Content**
A-Publication(*)	For publication/republication/correction.
Date	Date sent to printer.
Annotation	Note for printer.
B-Publication(*)	For publication/republication/correction.
Date	Date sent to printer.
Annotation	Note for printer.

7.7.8.5 Storage

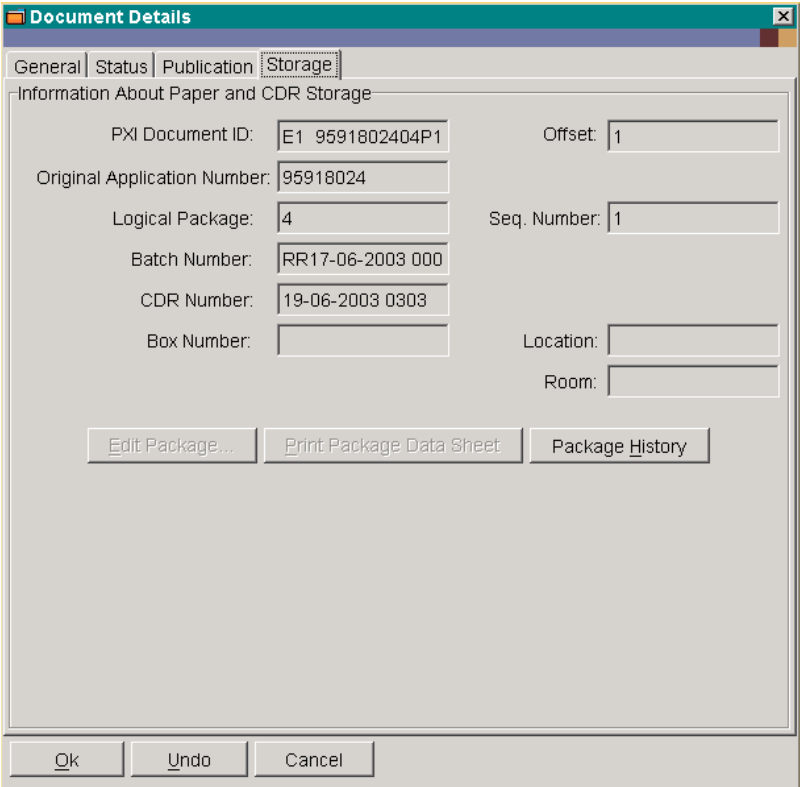


Figure 35: storage tab

Note:

This tab is for information only. The user cannot make any changes.

General tab	
Field	**Content**
PXI document	Package number and type of document.
Original dossier	Original patent application number.
Logical package	Package number in dossier.
Batch number	Includes date indexed.
CDR Number	Includes date put to CDR.
Box number	Where the paper document is stored.
Edit package…	The package can be edited if not scanned.
Print PDS…	PDS can be reprinted if not scanned.
Package history	History of package status (restricted).

7.7.9 Updating document details

The user can only update document details if the dossier is not already being accessed by somebody else. If the dossier is already being accessed, ePHOENIX advises that the dossier is locked for updates and that the user only has READ-ONLY rights.

When the necessary updates have been made, click on **OK**. ePHOENIX validates the updates, stores them in the Dossier Management System data base and updates the content of the TOC window.

If the update is unsuccessful, ePHOENIX gives an error message. In this case, try **Save** in the **Dossier** menu. It may be necessary to close and reopen the dossier before trying again.

7.7.10 Shortcuts

- To update DocCode, publication, Public and Document annotation directly in the TOC:
  - click with the left mouse button to activate the required field.
  - overtype the old entry.
  - either press the **Return** key or click on any other part of the TOC.
- To change the publication flag:
  - type P for publication
  - type R for republication
  - type C for a corrected publication
  - type a space for no publication.
- To change the public flag:
  - type Y for yes
  - type N for no
  - Maybe is not used.
- To close one or more documents:
  - select the document(s) in the TOC.
  - choose **Close** from the **Document** menu.
- To reopen documents:
  - choose Only show, Closed.
  - highlight the document(s) in the TOC.
  - choose Re-open from the Document menu.

7.7.11 Adding documents to the Image Viewer

To select a particular document, double-click on the entry in the TOC.

To look at documents that are not loaded in the viewer:

- select the document(s) in the TOC.
- choose Add to Viewer from the Document menu.

ePHOENIX displays the documents in the Image Viewer.

7.7.12 Removing documents from the Image Viewer

To remove documents from the viewer:

- select the document(s) in the TOC.
- choose Remove From Viewer from the Document menu.

Alternatively access the Viewer menu in the Viewer by pressing the right menu button and selecting **Remove from Viewer**.

This can be useful if it is necessary to have the documents displayed in a certain order in the viewer. The user must then sort the TOC in the required order before loading the documents again into the viewer.

7.7.13 Printing from the TOC

The user can

- print documents from the TOC.
- print the TOC listing on the local printer.

7.7.14 Copying documents to another dossier

To copy a document or documents to another dossier:

- Select the document(s) in the TOC.
- Choose Copy... from the Document menu. The selected documents are listed in the Copy Documents dialogue box.

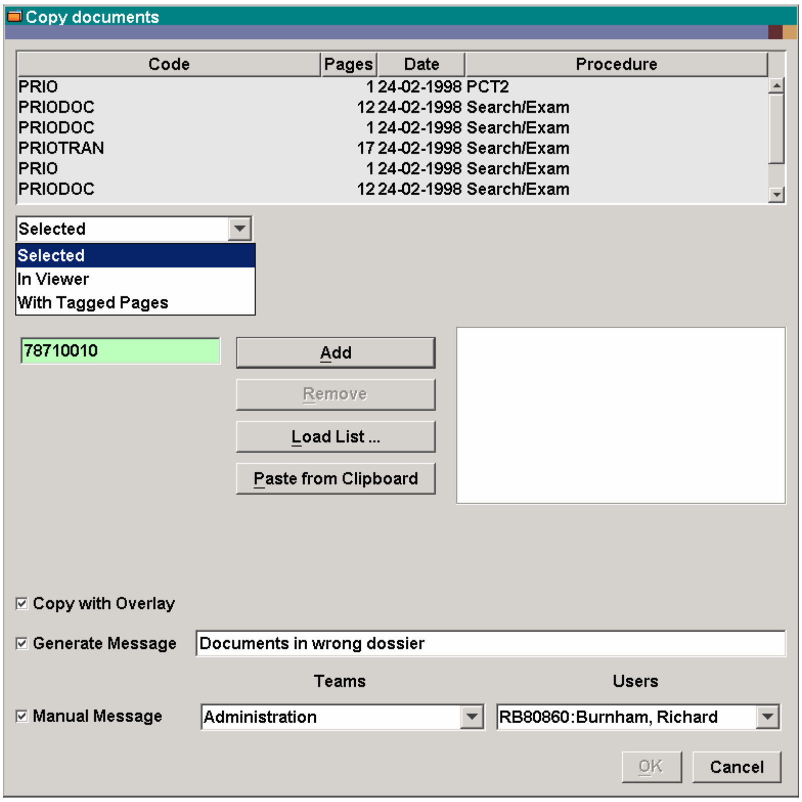


Figure 36: copy documents

In the drop-down list box, select:

- Selected to copy documents currently selected in the TOC
- In Viewer to copy documents currently in the Image Viewer
- With Tagged Pages to copy only documents with tagged pages.

Enter the target dossier number in the red entry field. The field turns green when a valid dossier number is entered.

Press the Enter key to add a dossier to the left or right. Should the focus not be on the Add button, either click on **Add** or hold down the **Alt** key and press **A**. Repeat to add more dossier numbers to the list if required.

The use can load a list of dossiers from legacy systems, by clicking on **Load List**, and then selecting the file containing the list. Contact the Support Desk for help with this special function.

Make sure the box **Copy with Overlay** is **not** ticked if the document is to be published. Otherwise, it should be ticked.

If the user wants a message to be generated on completion of the copy, select **Generate Message**, and type text for the message into the box.

Unless the user intend automatic distribution, select **Manual Message**, then select a team, and a user if the message is to go to a particular person in that team.

Click on **OK**. A window appears showing the progress of the copy:

- To do: Dossiers not yet copied to
- Done: Dossiers completed
- Not Found: Dossiers not found

The list of dossiers Not Found can be printed out, by clicking on **Print**.

Click on **OK** to complete the action. The copied document normally appears in the new dossier after a few minutes.

7.7.15 Moving documents to a different procedure

To move one or more documents to another procedure or participant in the same dossier:

- Select the document(s) in the TOC.
- Choose Move... from the Document menu.

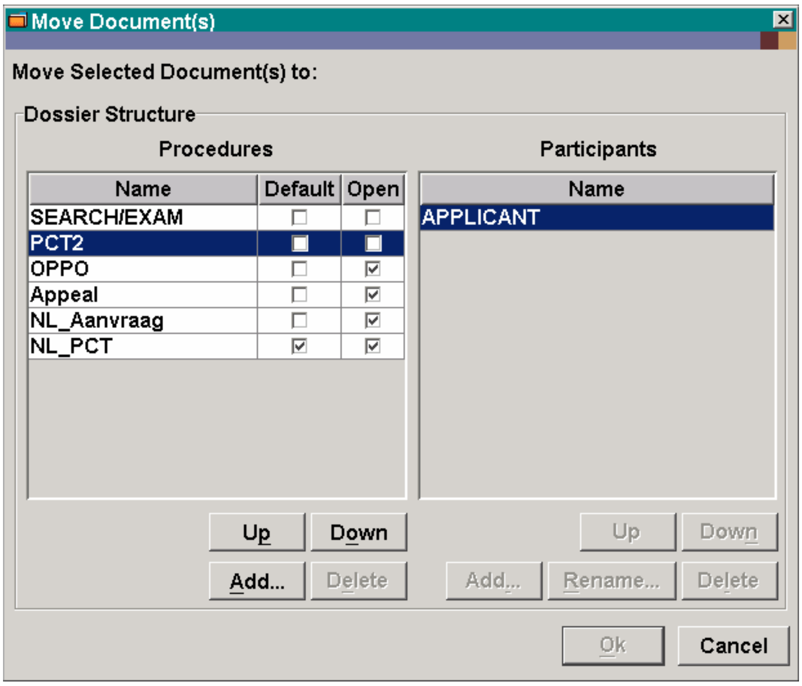


Figure 37: move documents

Select the procedure (and, if applicable, participant) to which the user wants to move the document(s). If the procedure or participant is not yet present for this dossier, the user must first add the new procedure/participant.

Click on **OK**.

7.7.16 Cloning a document to a different procedure

Cloning creates a copy of a single document in the same or another procedure or participant in the same dossier.

To clone a document:

- select a single document in the TOC
- choose Clone... from the Document menu.

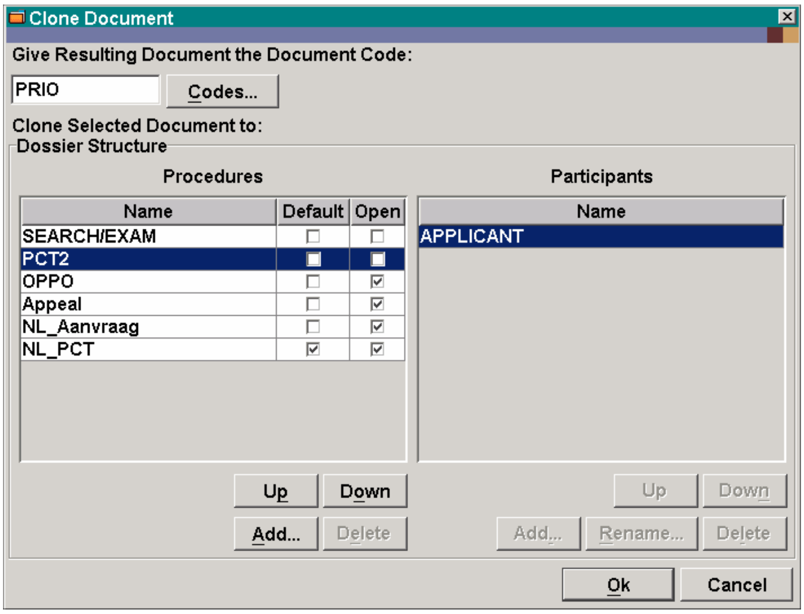


Figure 38: clone document

- select the Procedure and, if applicable, Participant, to which the user wants to clone the document. If the Procedure or Participant is not yet present for this dossier, the user must first add the new Procedure/Participant
- if required, the user can change the DocCode of the cloned document by overtyping or by selecting an appropriate code from the Code Helper.
- click on OK.

7.7.17 Joining two or more documents

This function joins two or more documents which have been scanned in the same package and which are consecutive in that package.

The function is disabled if the documents are not consecutive or are not part of the same package. In this case please send a message to Support Desk.

To join documents:

- select the documents in the TOC.
- choose Join from the Document menu. The Join Documents window appears.

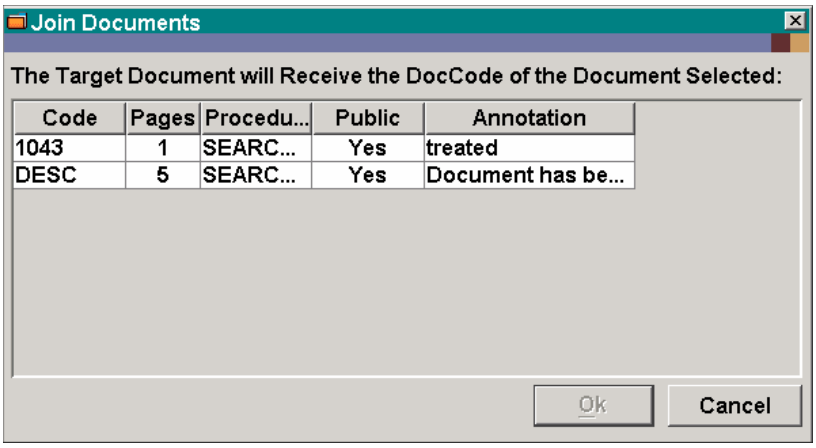


Figure 39: join documents

From the documents in the window, select the entry that best fits the description the user wants for the joined document.

Click on **OK**.

If necessary, change the DocCode of the joined document in the TOC.

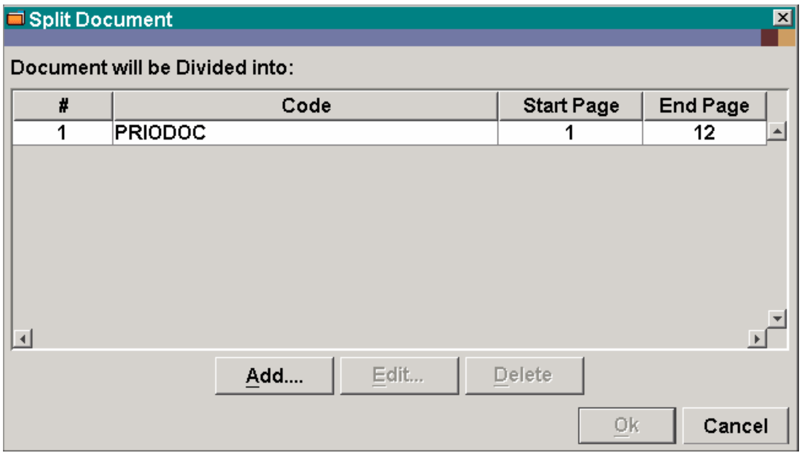
7.7.18 Splitting a document

This function splits a single document into two or more documents.

Make a note of how many documents are required and the page numbers of each document (for example, pages 1-4, pages 5-9, pages 10-12).

Select the document in the TOC.

Choose **Split...** from the **Document** menu. The Split Document window appears.



Click on **Add...** to specify a fragment to be created from the document. This displays the following window:

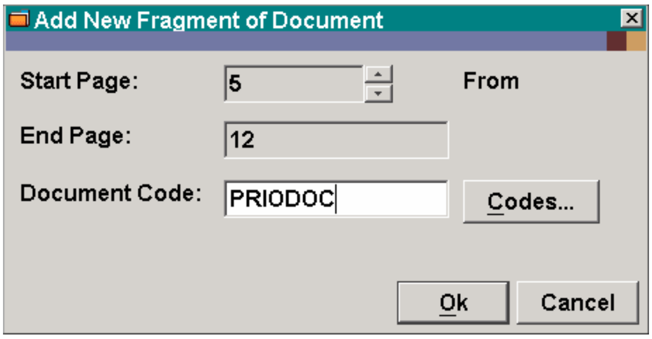


Figure 40: add new fragment of document

Specify the position where the document is to be split: the Start page number should match the page number noted in the first step.

If the user wants to split the documents into more than two fragments (for example, in the above example three documents are to be created from one original), the first fragment they define should contain everything except the part of the original document that they wish to remain in the first document. This is because the End Page cannot be set manually, but is calculated from the input.

So, in the example everything from page 5 to page 12 should be put into the fragment, and then this fragment can be subdivided later.

If required, the user can change the DocCode of the fragment by overtyping the code in the text box or by clicking on **Code** and selecting an appropriate code from the Code Helper.

Click on **OK** to close the **Add New Fragment...** window.

Repeat the procedure to subdivide fragments further.

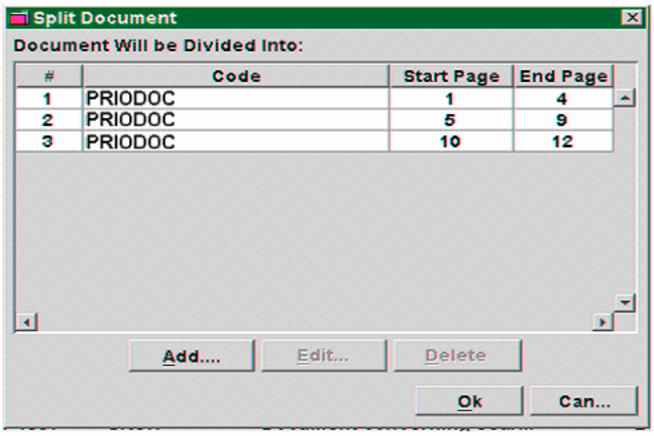


Figure 41: split document

Check that all the documents (fragments) contain the correct pages. If there is a mistake, the DocCode and the Start page of each fragment can be edited:

- select the fragment.
- click on Edit... The Edit Fragment of Document window opens. This is very similar to the Add New Fragment window described earlier.
- modify the Start Page and DocCode, as described earlier.

The End Page of the fragment cannot be edited here. To do this the user has to Edit the Start Page of the next fragment.

Click on **OK** to confirm the split.

Check in the TOC that the split documents contain the correct pages. If not, contact Support Desk.

7.8 Handling messages within a dossier

7.8.1 Overview

t The ad hoc creation, or forwarding, of messages can be done only after the user has opened a message. Creating or Forwarding of a message from within an open Dossier is described here. Forwarding of a Pending message is also possible from the Mailbox.

7.8.2 Forwarding a message within a dossier

The user can forward a message to a colleague or another team:

- Either select Forward from the Message menu within the dossier or select Forward from the dialogue box shown when the user closes the dossier.
- Provide the following information:
  - **Team**: Select the required team from the drop-down list.
  - **User**: Select an individual user from the team, only if agreed in advance.
  - **Text**: Type in. This appears in the destination mailbox, so please keep it short.
- Click on **OK**.

When a message has been forwarded it disappears from their mailbox.

The user can use a shortcut to find the Team or User by typing the first letter of the name to go straight to that part of the list. The user can go to the next or previous name using the **Up** or **Down** arrow keys on the keyboard.

7.8.3 Creating a message

Choose **Create** from the **Message** menu in the Dossier.

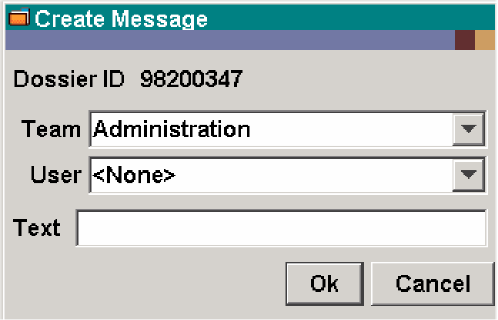


Figure 42: create message

Fill in the fields:

- Team: Select the required team from the drop-down list.
- User: Select an individual user from the team, only if agreed in advance.
- Text: Type in the box. This appears in the destination mailbox, so please keep it short.

Click on **OK**.

When the user creates a message it appears in the target mailbox with the code ADHOC.

7.8.4 Closing / keeping / forwarding a message

When the user has selected **Close** in the Dossier menu, the system prompts the user to confirm what to do with the message:

- Close all messages for the dossier (in their mailbox)
- Close message
- Keep message (the user can add a text to the pending message)
- Forward message
- Forward all messages for the dossier (in theirr mailbox)
- Reply to the message

The first option is available only if they have more than one message for the same dossier in theirr mailbox.

After asking the user for action in case there are any previously unviewed documents, ePHOENIX then returns to the mailbox and marks the messages.

7.9 Checklists

7.9.1 Overview

t Checklists enable the user to record in a systematic way what has been done in a dossier. They minimize duplication of work. As with the cover and status screens, the checklists are linked to the procedure that they are working in. There may be more than one checklist for a given procedure, as shown in this example.

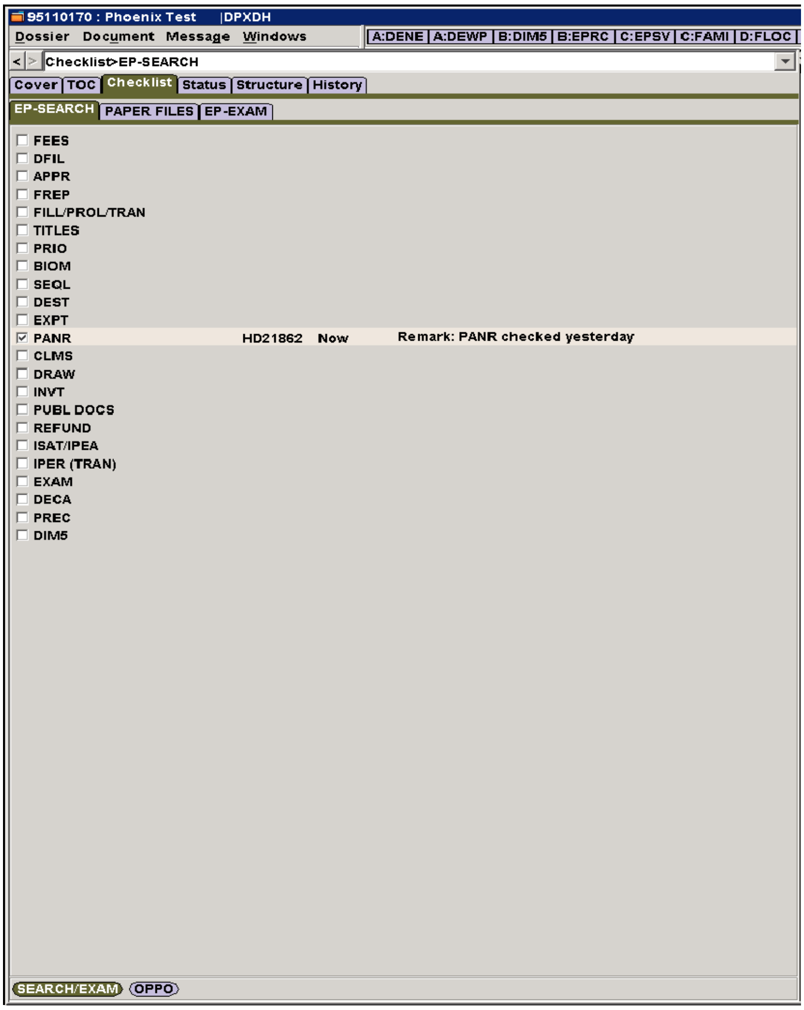


Figure 43: checklist

7.9.2 Checklist Toolbar

To open the Checklist Toolbar, choose **Checklist Toolbar** from the **Windows** menu in the dossier.

The Toolbar floats on top of the other windows, enabling the user to view and use it simultaneously with the Image Viewer and other dossier information. The user can :

- move the Toolbar around, drag its title bar with the mouse.
- close the Toolbar, click on the cross at the top right of the Toolbar.

If the user can see more than one checklist on the Toolbar:

- to select a checklist, click on the appropriate tab.
- if the Toolbar is too narrow to display all the tabs, and the required checklist is not visible, click on the > or the < button until the tab is visible.

7.9.3 Marking a checklist item

Select the appropriate checklist.

Click on the item. ePHOENIX generates a checkmark in the relevant box together with the UserID, and the word ‘Now’.

When the dossier is saved or closed, the word Now is replaced by the current date.

7.9.4 Updating a checklist item

Note:

This is a restricted function.

Click once to remove the checkmark and again to update it with the current date.

Add a remark to the item, if required, by clicking in the field at the right of the date and typing some text.

The text is confirmed when the user leaves the checklist or save or close the dossier.

7.10 Status screens

7.10.1 Overview

t Status screens give information about the dossier within a procedure. Status screens are linked to procedures, so the user sees only those screens relevant to the selected procedure.

7.10.2 Viewing status screens

To view a status screen, click on the **Status** tab.

Click on the tab of the required status screen. The screen is displayed. Only one screen can be viewed at a time.

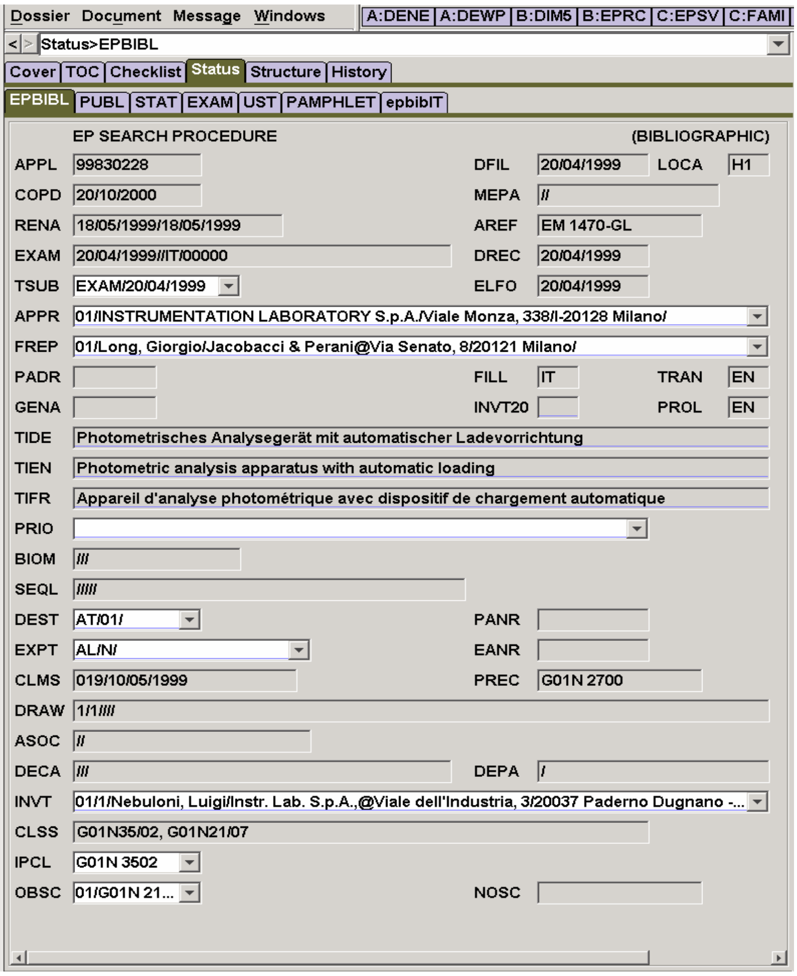


Figure 44: status screens

Some items are underlined. These are items that contain multiple data than can be displayed in a pop-up window.

To display full details of an underlined item, double-click on it. The information appears in a pop-up detail window.

Some detail windows contain several sub-items, with a **>>** button in the bottom right of the window. To move to the next sub-item, click on the **>>** button.

To close the detail window, either click on the cross icon at the upper right corner, or press the **Esc** key.

Some items appear as drop-down lists.To see the list of items in a drop-down list, click on the arrow at the right.

7.11 Structure

t The Structure tab contains the dossier structure information. Unlike most other tabs, this tab is independent of the selected procedure.

When a procedure is selected, Applicant is by default given as the main participant. In the Opposition and Appeal procedures, there may be other participants. Within the Structure screen the user can add, edit or delete a procedure or participant.

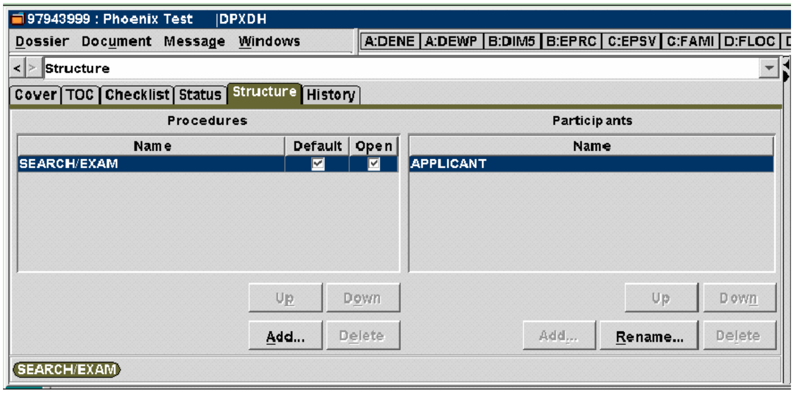


Figure 45: structure tab

7.11.1 Adding a new procedure

Select the **Structure** tab.

Click on **Add...** from the **Procedures** list. The Add Procedural Group window pops up.

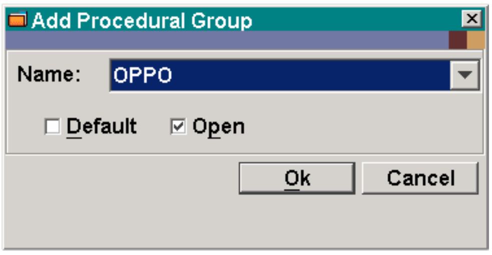


Figure 46: add procedural group

Select the procedure name from the drop-down list.

Check the **Default** box if this procedure is the current procedure.

Check the **Open** box if this procedure is a pending one (as it normally is). Otherwise, uncheck this box.

Click on **OK**.

7.11.2 Adding a participant

Select the **Structure** tab.

Select a multi-party procedure, and click on **Add...** from the **Participants** list. The Add Participant window pops up.

Figure 47: add participant

Type in the appropriate name (for example, OPPO 01) and/or the name of the party (for example, Siemens).

Click on **OK**.

7.11.3 Editing a participant

Select the **Structure** tab.

Select a procedure and **Rename** from the Participants list. The Rename Participant window pops up.

Type in the appropriate name (for example, OPPO 01) and/or the name of the party (for example, Siemens).

Click on **OK**.

7.11.4 Deleting a participant

Ensure that no documents are present for this participant, even closed documents. They may be moved to another participant or procedure if appropriate.

Select the **Structure** tab.

Select the appropriate procedure and the participant.

Select **Delete** from the Participants list. The participant is removed.

7.11.5 Deleting a procedure

Ensure that no documents are present for the participants, even closed documents. They may be moved to another participant or procedure if appropriate.

Select the **Structure** tab.

Select the procedure.

Delete all the participants for that procedure.

Click on **Delete** from the Procedures list. The procedure is removed.

7.11.6 Changing the orders of procedures or participants

The user can change the order of procedures in the Procedures list, or of participants in the Participants list. The order of Procedures is reflected in the order of the buttons at the bottom of the Dossier window, used to switch between procedures.

Each list has an **Up** and a **Down** button. Select one item from the list and click on **Up** or **Down** to move it in the list. Repeat for other items in the list until the list is in the desired order.

7.12 History

7.12.1 Overview

t At the moment the user opens the dossier, the system updates the history with the users UserID, date, time and type of access to the Dossier.

The type of access is:

- the DocCode of the message, if the dossier was opened from the Mailbox
- ad hoc otherwise.

On the History tab, the system displays the following information for each dossier-related action. The actions are in chronological order with the most recent action on top:

- date of first opening by user
- time
- DocCode
- UserID
- comments

You can scroll through the information in the History tab.

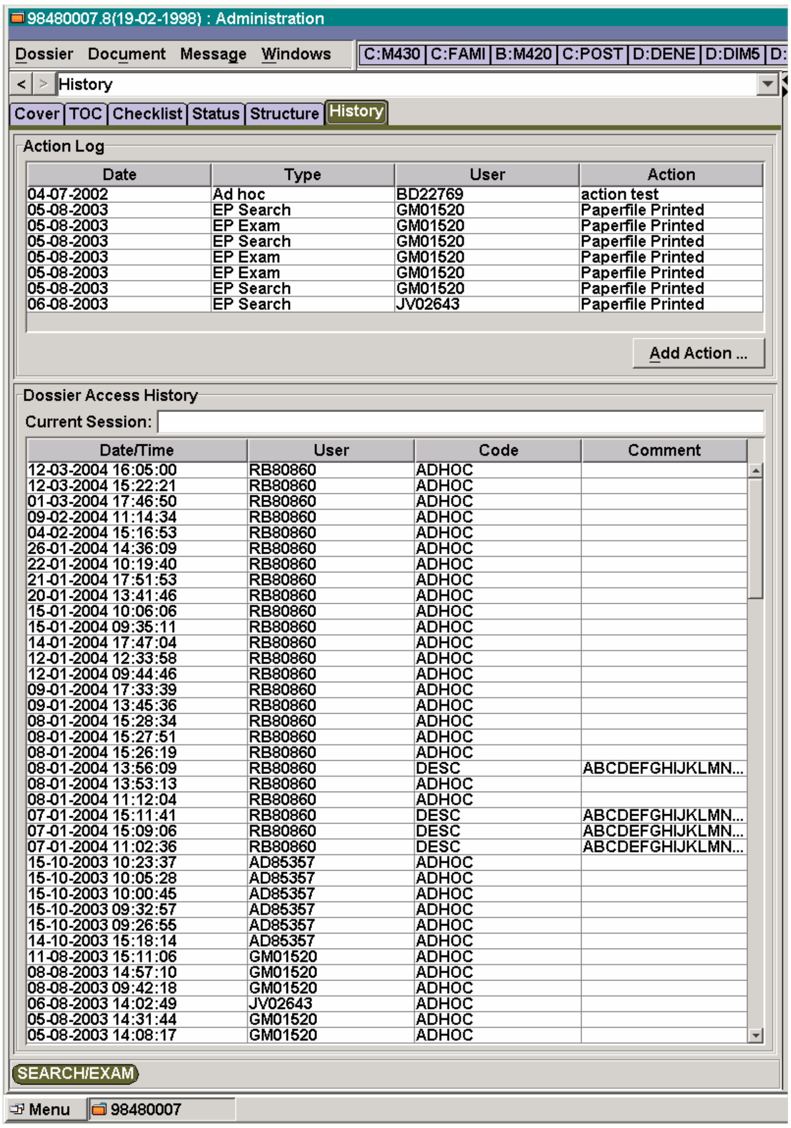


Figure 48: history tab

7.12.2 Action Log

The Action Log records system-generated actions, such as the request, printing and receipt of a paper file.

You can also record actions manually:

Click on the **Add Action…** button. A window pops up.

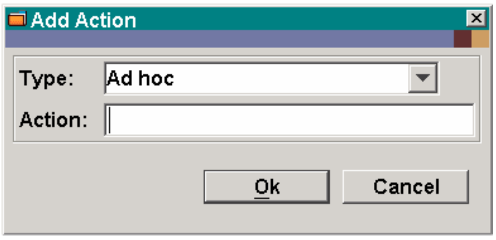


Figure 49: add action

Either select an Action **Type** from the drop-down list
or type one in.

Add a description of what has been done in the **Action** field.

Click on **OK**.

The system adds the user`s UserID automatically.

7.13 Emulators

7.13.1 Using an emulator

t ePHOENIX allows the user to access other (legacy) databases without leaving the ePHOENIX environment. This is done through emulator windows. Where appropriate, the current dossier number is automatically filled in for the user.

Note

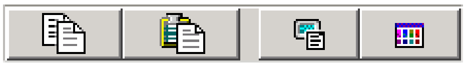
Access to these tools is restricted by the level of authorisation in the user`s profile.

To open an emulator window, choose **Emulator** from the **MADRAS** menu.

To close an emulator window:

- exit from the system
- either choose Exit from the File menu in the emulator window or click on the cross icon at the top right of the emulator window.

The emulators behave in the same way as other windows. When another window is activated in MADRAS, the emulator may disappear behind it. Like other open windows, it is always accessible as a button in the MADRAS Taskbar. These buttons have letters (any of A - F) to distinguish the different emulator sessions.

Emulator	
Field	**Content**
File, Print Screen	Prints the display inside the emulator window. You are first shown standard dialogues to select how the print is to appear and the printer to be used. Copies the text from the screen so that it can be pasted into a document in Windows
File, Exit	Closes the emulator window.
Edit, Copy	Copies the text from the screen so that it can be pasted into a document in Windows. Text is selected by dragging a box around it. The command then copies only this text.
Edit, Cut	Same as copy, and deletes the selected text also.
Edit, Copy Append	Copies the text from the screen, adding it to the end of any text that has already been copied. Text is selected by dragging a box around it. The command then copies only this text.
Edit, Paste	Takes any text you have already copied from a Windows application and pastes it into the emulator window at the position of the cursor. This is possible only if the system allows it.
Edit, Clear	Clears any text you have entered into the emulator window. This is possible only if the system allows it.
Edit, Blink Cursor	If ticked, the cursor blinks. Otherwise, the cursor is constant. The default is blinking. Changes do not take effect until you restart MADRAS.
Edit, Block Cursor	If ticked, the cursor is a block. Otherwise, the cursor is an underline.
Communication, Disconnect	Disconnects from the system in the emulator window.
Communication, SysReq	See the system documentation.
Emulator buttons (in order shown)	
	Copies selected text from the emulator window. It can be pasted into a document in Windows. Select the text to be copied by dragging a box around the text in the window before using this button.
	Takes any text already copied from a Windows application and pastes it into the emulator window at the position of the cursor. This is possible only if the system allows it.
	Prints the display inside the emulator window to the local printer. Select the text to be copied by dragging a box around the text in the window before using this button.. The command then prints only this text.
	Configures display colours for the window.

7.13.2 Configuring emulator settings

7.13.2.1 Emulator window position and size

When an emulator is opened for the first time, it appears with a default position and size. The size and position can be changed and ePHOENIX will remember these changes for next time.

7.13.2.2 Emulator window colours

To change the display colour settings for an emulator, click the rightmost button in the emulator's menu.

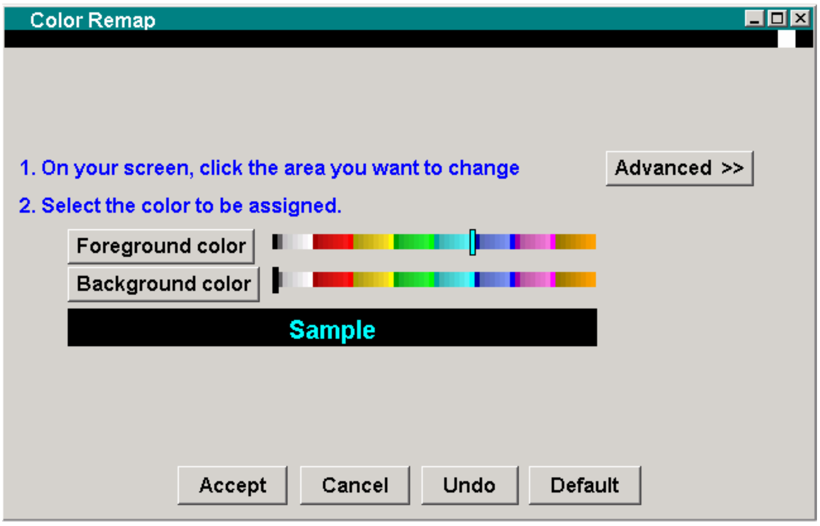


Figure 50: color remap

Either click on the colour bars to choose colours for the foreground and the background or click on the required button (**Foreground Color** or **Background Color**) to see a box where the Red, Green and Blue components of the colour can be chosen. Click on **OK** to set the colour.

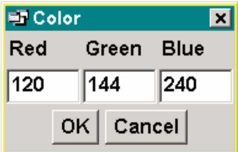


Figure 51: color

Click on:

- **Accept** to confirm the colour change
- **Undo** to undo the changes that have just beenmade
- **Cancel** to cancel the change, and close the Color Remap dialogue.
- **Default** to return to the default colours.

Click on the **Advanced >>** button to get to an additional way to set colours of individual items in the emulator window:

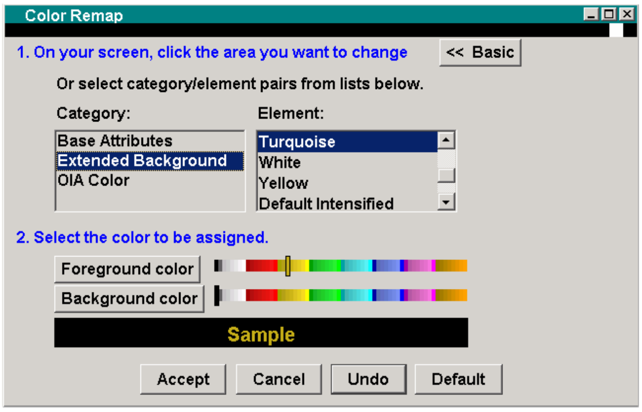


Figure 52: color remap

Click on the category to be modified Click on the element to be modified from that category.

Choose the colour for that element. Changes occur in the window as the selection is made.

Click on **Accept** to confirm the colour changes.

After the new colours have been acceptesd, they apply to all new emulator windows opened.

7.13.2.3 Emulator session letters

You can change the Session letters associated with each emulator transaction, and whether a button is shown for an emulator transaction.

Choose **Phoenix Settings** from the **MADRAS** menu. Select the **Tools** tab.

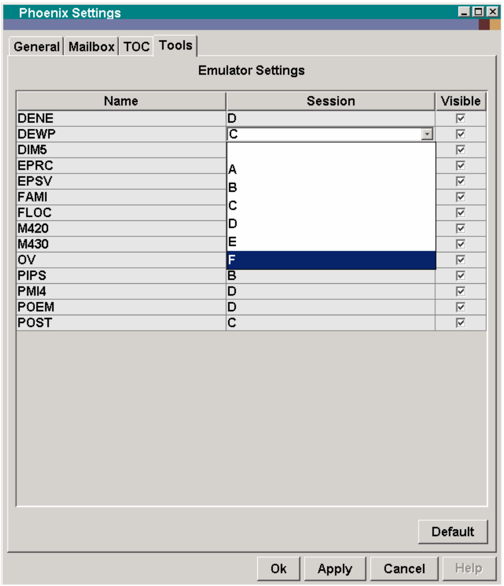


Figure 53: PHOENIX settings

For a specific legacy system, click on the Session entry and select the letter to be used for that server.

Tick in the Visible column for a button to appear on the MADRAS Taskbar whenever an emulator session is open to that server.

Click on **Apply** to apply the new settings or click on **OK** to apply the new settings and close the dialogue box.

Click on **Default** to return all settings to the default, including all taskbar buttons set to visible.

7.14 Close, keep, or forward

To stop working on a dossier, click on **Close** from the Dossier menu.

If the dossier has been opened ad hoc, the dossier is simply closed.

If a message has been opened, a window with options is displayed.

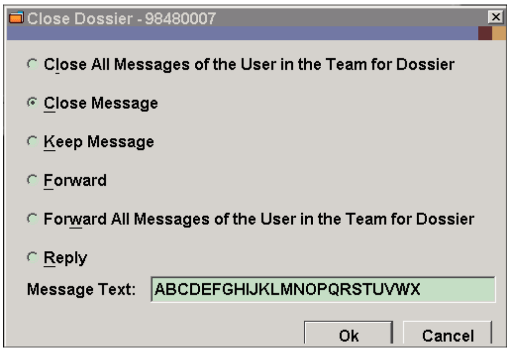


Figure 54: close dossier

Close Dossier	
Field	**Action**
Close all messages of the User in the Team for Dossier	ePHOENIX closes the dossier and marks all messages for the current dossier in the users mailbox only as Closed.
Close Message	ePHOENIX closes the dossier and marks the message as Closed. (This is selected by default).
Keep Message	ePHOENIX closes the dossier and marks the message as Pending.
Forward	The user may add text and must indicate to which team (optionally which user) the message should be forwarded. ePHOENIX asks whether or not the user`s UserID should be added to any unviewed document, and when you respond it closes the dossier.
Forward all messages of the User in the Team for Dossier	The user may add text and must indicate to which team (optionally which user) the message should be forwarded. Any text is added only to the current message; the other messages keep their original text. ePHOENIX asks the user whether theirr UserID should be added to any unviewed document. When they respond, ePHOENIX forwards all messages in their mailbox only for the current dossier to the team or person indicated, and then closes the dossier.
Reply	The user may add text. ePHOENIX asks them whether theirr UserID should be added to any unviewed document. When they respond, ePHOENIX forwards the message to the team and person indicated, and then closes the dossier. Please do not use this function if team is indicated as ‘unknown’.
Message Text	Type in any text for the message (where appropriate).

7.15 New documents

7.15.1 Adding a new document

t Any letter, form or other document created by an ePHOENIX user must be added to the relevant dossier. For this purpose, a Package Data Sheet (PDS) must be printed and an entry made in the Table of Contents for a document to be sent to scanning,

Choose **New...** from the **Document** menu of the dossier. The dossier number is pre-filled.

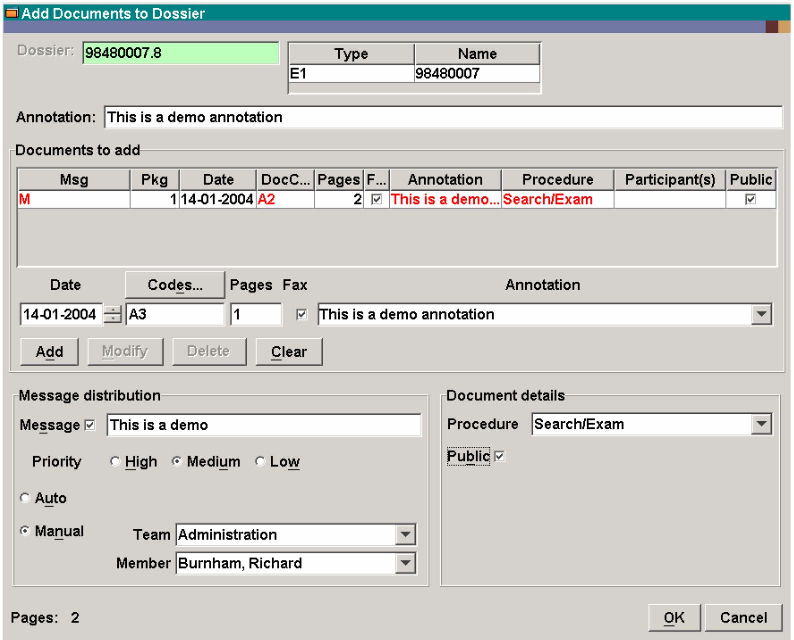


Figure 55: add documents to dossier

Note

It must be possible to reproduce documents sent for scanning if they are lost, so please keep copies of any free-text letters.

A date of despatch is suggested. If the user wants to overwrite this, they can either type in the date or

- click on the date, or move to it using **Tab** or **Shift-Tab** keys.
- use the **PageUp** and **PageDown** keys to adjust the month, and the cursor **Up** and **Down** keys to adjust the day.

Enter the DocCode.

Enter the number of pages.

Optionally, check the FAX box to show that this document is a fax.

Optionally, choose an annotation from the list, or type one in freehand.

To add the entry to the display window, click on the **Add** button, or press the **Enter**.

Repeat the steps to add further documents, if required.

Select the **Procedure** to which the document relates.

If the document is to be public, tick the **Public** box.

If a message is to be sent::

- tick the **Message** box, then type in the text
- select the **Priority**
- select **Auto** or **Manual**
- for a manual message, select the **Team** and if appropriate the **Member** to receive the message.

Check the details in the display window. You can make corrections at this stage.

Click on **OK**.

7.15.2 Code Helper

The Code Helper helps the user find the right code for a document.

If unsure of the code to be used click on **Codes...** A dialogue window appears.

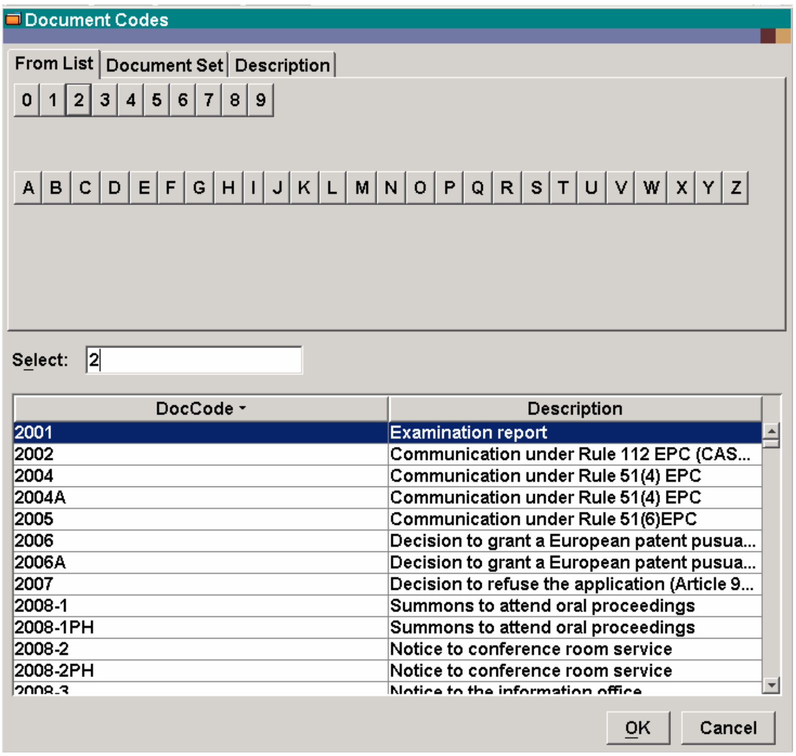


Figure 56: from list

To see all the codes beginning with a particular letter or number:

- click on the appropriate button: for example, clicking on **1** shows a list of all DocCodes beginning with the number '1' and clicking on **P** shows a list of all DocCodes beginning with the letter 'P'.
- type the first letters of the required code in the **Select** box. The first code beginning with those letters is highlighted.
- select the code from the list.

To search for a specific DocCode by keyword

- select the **Description** tab.

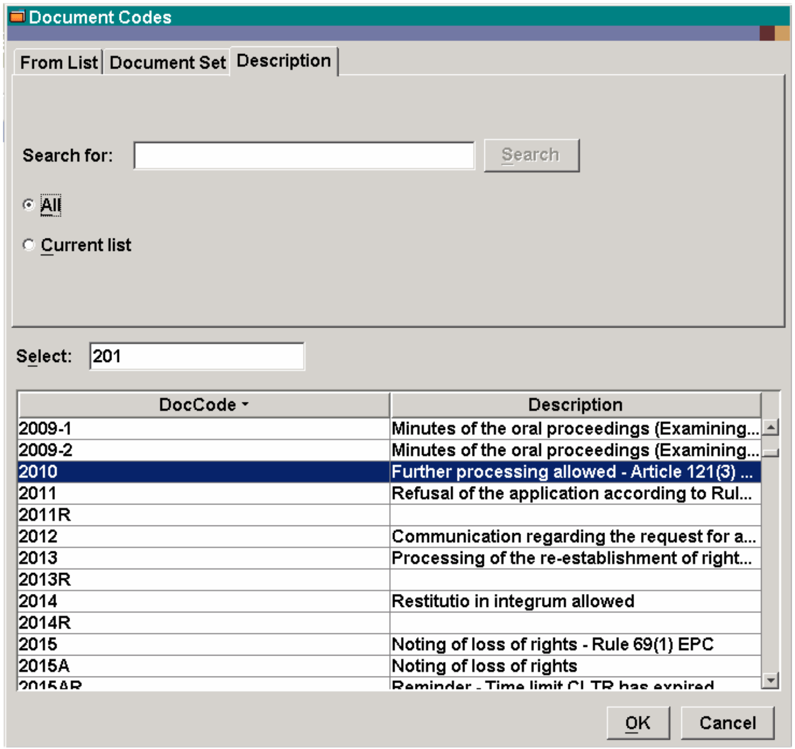


Figure 57: description tab

- type in a key word, for example, ‘invent’.
- select the option **All** to search though all DocCodes, or **Current List** to search the currently displayed list.
- click on **Search**. A list appears of all DocCodes containing the key word.
- select the code from the list.

Document Sets are sets of codes related to a specific task. To search in a specific Document Set

- select the **Document Set** tab.

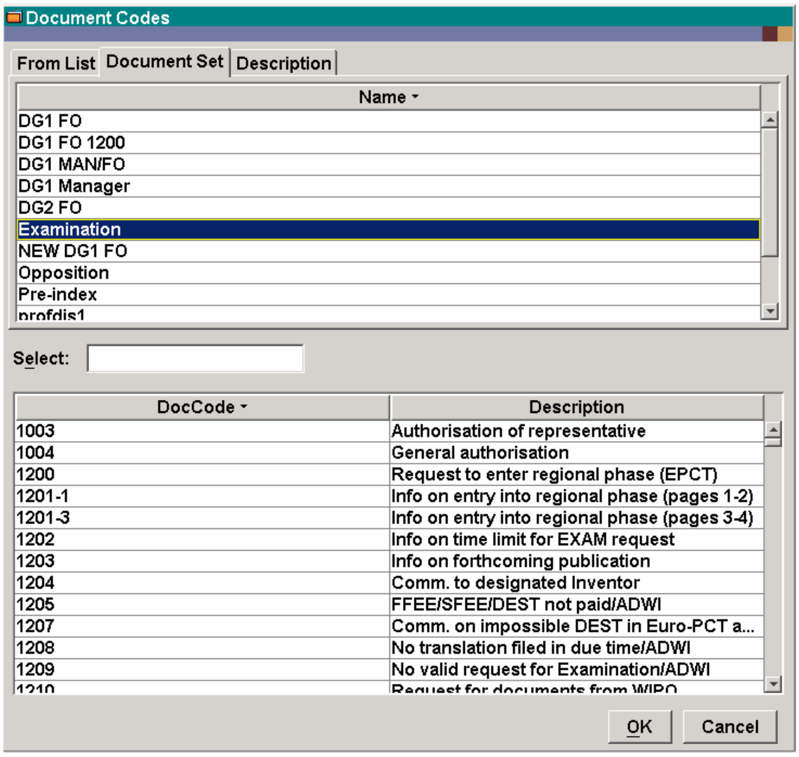


Figure 58: document set

- select the document set
- select the code from the document set.
- click on **OK**.

7.15.3 Modifying the new document

If a mistake is made before the Package Data Sheet (PDS) has been printed

- highlight the document in the Add Documents to Dossier window. This fills the data fields for editing.
- make the necessary correction
- click on **Modify**.

You can use this to change the procedure to which the document will be scanned, or to give a document a non-public flag.

An added document can also be deleted in a similar way:

- highlight the document in the Add Documents to Dossier window.
- click on **Delete**.

If a mistake is discoveredafter the PDS has been printed, it can be edited in the Document Details window:

- select the document in the TOC
- choose **Details...** from the **Document** menu
- select the **Storage** tab
- select **Edit Package...**
- modify the entry in the Edit Package screen if need be
- click on **OK**. A new PDS is printed
- discard the old PDS.

7.15.4 Clearing the entry field

If a mistake has been made in the Add Documents to Dossier or the Edit Package dialogue, click on **Clear** to start again,.

To **OK** the documents while the entry field is still active click on **Clear** first.

7.15.5 Sending a message

The message column in the Add Documents window shows whether a message will be created for this document. The default settings can be overwritten.

Sending a message	
Field	**Content**
Message	Tick this box if a message is to be sent
Auto	Automatically distributed message
Manual	Manual message: select the Team and (optionally) the Team Member
Priority	Message priority: High, Medium or Low

7.15.6 Printing a PDS

When everything in the screen has been completed and **OK** clicked, a PDS is printed on your desktop printer. Please make sure this is printed on coloured paper.

At the same time, a new document entry appears in the TOC in grey. Send the document(s) together with the PDS for scanning.

If the PDS does not print properly, you can reprint it provided that the document has not been scanned by choosing **Details, Storage, Print Package Data Sheet** from the **Document** menu, choose

8 Image Viewer

8.1 Overview

The Image Viewer makes ePHOENIX documents available on screen as images and contains a number of functions to manipulate these images. The Image Viewer appears, by default, on the right of the dossier window, but this can be changed.

One image is displayed at a time, but two images can be displayed if a second viewer is opened.

Images related to a message are loaded automatically when the message is opened. If the viewer is empty, it means that there are no images belonging to the message.

Documents not previously viewed are also loaded automatically in the viewer, and ePHOENIX saves the UserID of the person viewing the document for the first time (under certain conditions). The first person to view the document is responsible for the quality of the images and completeness of the document.

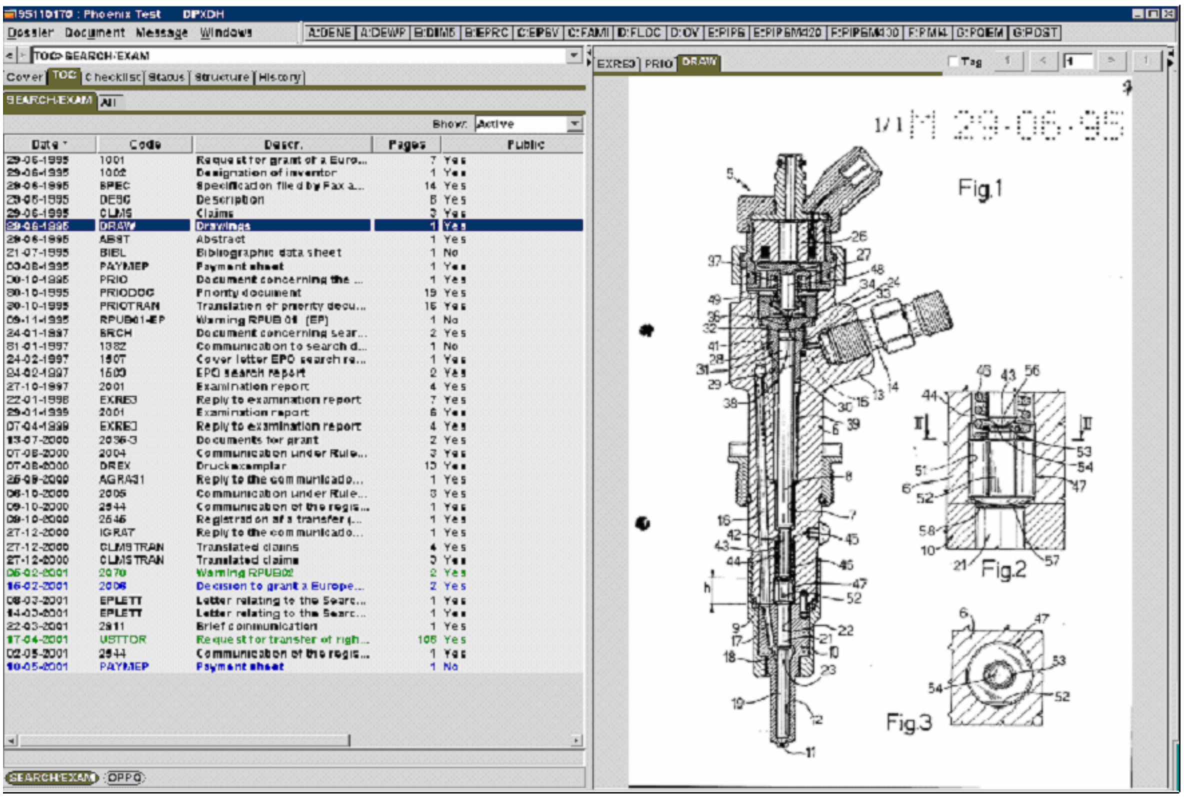


Figure 59: image viewer

8.2 Image Viewer settings

Users can customize some of the default settings in the Image Viewer. Users must customize your settings separately for each team of which they are a member.

Choose **Phoenix Settings** from the **MADRAS** menu, or press F12.

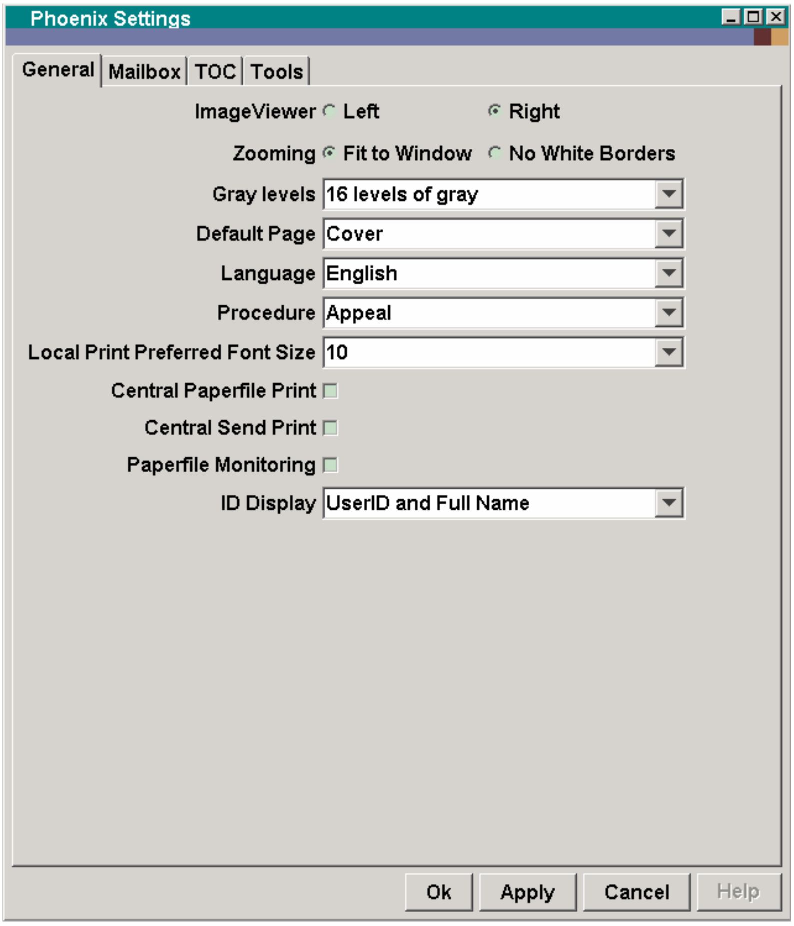


Figure 60: PHOENIX settings

In the Phoenix Settings window, select the **General** tab.

General tab	
Field	**Content**
Image Viewer	Choose whether Image viewer is on the left or the right.
Zooming	You can set this to Fit to Window or No White Borders.
Grey levels	Black and White, 4 Levels of Grey and 16 Levels of Grey.
Local print pref.	Defines the font size for printouts on the desktop printer (only for mailbox and TOC printouts, not PDSs).

To see what the new layout will look like, click on **Apply**. ePHOENIX immediately applies the new setting. (Drag the window if necessary.)

Click on **OK**.

8.3 Image Viewer menu

Viewer functions are controlled from the View menu. To call up the Viewer menu, click the right mouse button in the Viewer window.

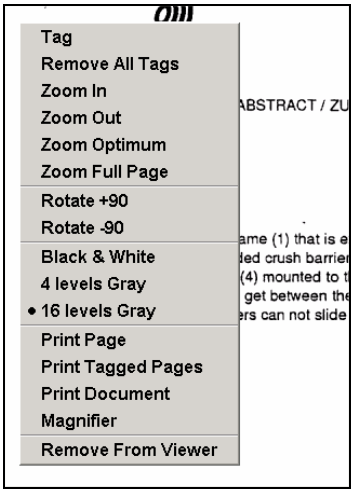


Figure 61: image viewer menu

8.3.1 Displaying documents

By default, the first page of the leading document is displayed in the Viewer. The document codes of the other documents retrieved are listed as a series of tabs, above the image, on the left.

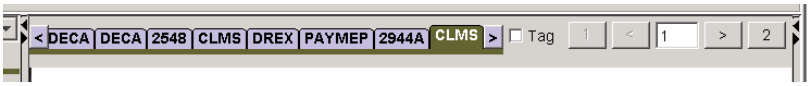


Figure 62: document codes

You can scroll through these if there are too many tabs to see at once.

To scroll left through the tabs, click on the **<** button

To scroll right, click on the **>** button

To view a document from the TOC either double-click on the appropriate entry in the TOC or select the entry, then choose **Add to Viewer** from the **Document** menu.

The tab showing the document code appears in the Viewer. The tabs for documents selected from the TOC are displayed in the order In which they were selected.

To move between documents, select the tab with the required DocCode or hold down the **Shift** key and press the **right arrow** or **left arrow** key to jump from one document to the next.

Note:

These arrow keys are on the main part of the keyboard, not the numeric keypad.

8.3.2 Selecting pages

Above the image on the right, there are buttons enabling the user to go to specific pages in the displayed document. On the rightmost button, the total number of pages in the document is shown.

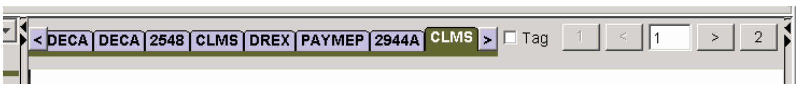


Figure 63: selecting pages

To go to a specific page, type the page number into the box and press the **Return** key.

To page through the document, click on the **>** button to go forward in the document and the **<** button to go back.

To go to the first page, click on the leftmost button, displaying the page number 1.

To go to the last page, click on the rightmost button, displaying the number of pages.

If the (whole) image is not displayed, press the **-** (**minus**) key on the numeric keypad a few times.

Click on the viewer again after using these buttons, as the behaviour of shortcut keys may not be correct unless this is done.

8.3.3 Removing documents from the Image Viewer

If the list of document tabs is too long, remove some or all of the documents from the Viewer.

From the TOC:

- Select the document in the TOC
- Choose **Remove from Viewer** from the **Document** menu.

From the Viewer:

- Display the document in the **Viewer**.
- Right-click on the document to see the **Viewer** menu.
- Choose **Remove from Viewer**.

If the documents are displayed in the wrong order, remove them from the viewer, sort the TOC in the required order and then add the documents to the viewer again.

8.4 Zooming

8.4.1 Zooming in

The image can be changed by either pressing the **+** key on the numeric keypad or choosing **Zoom In** from the **Viewer** menu

Part of the image can also be enlarged by selecting the section of the image by dragging with the left mouse button horizontally, then vertically, to form a rectangle, then releasing the button.

8.4.2 Zoom optimum/full page

The default view is that the whole of the selected page fills the Viewer window. To return to this view choose **Zoom Full Page** from the **Viewer** menu.

There is also another view in which the page is displayed at about its correct size, regardless of the size of the Viewer window which means that not all of the page will necessarily be shown at one time. Choose **Zoom Optimum** from the **Viewer** menu.

To switch between the full-page and optimum views and back, press the **/** forward slash key.

8.4.3 The Magnifier

For parts of an image which are very difficult to read, a magnifier is available. Choose **Magnifier** from the **Viewer** menu.

A pop-up window opens displaying a magnified view of part of the page. To view a specific area in the magnifier, move the mouse in the Viewer window.

The magnifier window can be resized, changing the magnification.

Choose **Magnifier** again from the **Viewer** menu to close the magnifier window.

8.4.4 Opening viewer in full screen (study mode)

To view a whole document in greater detail, open a viewer to fill the entire screen. Either choose **1 Image Window** from the **Windows** menu of the Dossier or press the **F8** key. Either choose **Default Layout** from the **Windows** menu or press the **F6** key to close ‘study’ mode:

8.5 Rotating the image

An image can be rotated by 90 degrees. By repeating this, the image can be rotated by 180 or 270 degrees. To rotate an image 90 degrees clockwise either choose **Rotate +90** from the **Viewer** menu or press the *** (asterisk) key on the numeric keypad. To rotate an image 90 degrees anticlockwise choose **Rotate -90** from the **Viewer** menu.

8.6 Second image viewer

To compare two documents of the same dossier, open a second viewer. Select the documents you want to view and load them into the viewer window and either choose **2 Image Windows** from the **Windows** menu of the dossier or press the **F7** key.

The original viewer moves to the opposite side of the screen and the second viewer replaces the first one. You can then select the same or different documents in the two viewers, provided they have been loaded to the viewer previously.

The keyboard shortcuts for zooming or rotating operate only in the first viewer. Use the mouse in the second viewer.

To close the second viewer either choose **Default Layout** from the **Windows** menu or press the **F6** key.

8.7 Keyboard shortcuts

The functions listed below have keyboard shortcuts. The first four keys are in the group of 6 keys above the cursor keys. Mouse operation is by a single click of the left mouse button.

Mouse operation, single window		
The keys marked (*) are keys on the numeric keypad (the group of keys on the far right of the keyboard).		
Action	**Mouse action**	**Keystroke**
Next page	>	Page Down
Previous page	<	Page Up
Last page	Box with last page number	End
First page	Box with first page number	Home
Tag for printing (*)	Checkbox above image	Enter
Zoom in (*)	Viewer menu - Zoom	+
Zoom out (*)	Viewer menu - Zoom out	-
Zoom optimum (*)	Viewer menu - Zoom Optimum	/
Full page (*)	Viewer menu - Zoom Full Page	/
Rotate (*)	Viewer menu - Rotate	*
Select document (*)	Document tab	Shift + right/left arrow
Second viewer	Windows menu - 2 Image Window	F7
Study mode	Windows menu - 1 Image Window	F8

When two viewer windows areopen, the **Page Up** and **Page Down** keys described above act on the second image viewer.

Mouse operation, two windows	
The keys marked (*) are keys on your **numeric keypad** (the group of keys on the far right of your keyboard).	
Action	**Keystroke**
Next page in first viewer	Alt + Page Down
Previous page in first viewer	Alt + Page Up
Next page in both viewers	Ctrl + Alt + Page Down
Previous page in both viewers	Ctrl + Alt + Page Up

8.8 Printing from the viewer

8.8.1 Printing

The desktop printer can print

- the current page
- the current document
- tagged pages.

8.8.2 Tagging pages

To tag pages for printing:

- view the page you wish to print.
- either click on the **Tag** check box above the image or press the **Enter** key.

Individual tags can be removed in the same way.

To remove all tags at once, choose **Remove All Tags** from the **Viewer** menu.

8.9 Troubleshooting

8.9.1 Images are not available

If no images are available, there are several possible reasons:

- The document is indexed but not yet scanned/loaded. Iin this case the TOC entry is shown in grey.
- The document was not automatically loaded in the viewer and it has not been requested. In this case, request the document from the TOC, for example, by double-clicking it.
- A document has been seen, but cannot be found when the dossier is reopened. The document could have been associated with a message, and therefore it was visible, but it is stored in another procedure. Check in the **All** tab in the TOC.
- PXI (the ePHOENIX Imaging System) is currently unavailable. An error message should be received in this case. Other parts of the system can still be used.

If a colleague has normal access to PXI but you still do not, try closing MADRAS and rebooting your PC. If the problem persists, contact the Support Desk.

9 Printing

9.1 Printing a document

You can print documents selected in the TOC or the documents displayed in the Viewer:

Choose **Print...** from the **Document** menu. The Document Printing dialogue opens.

Select the **Print Document Information** tab.

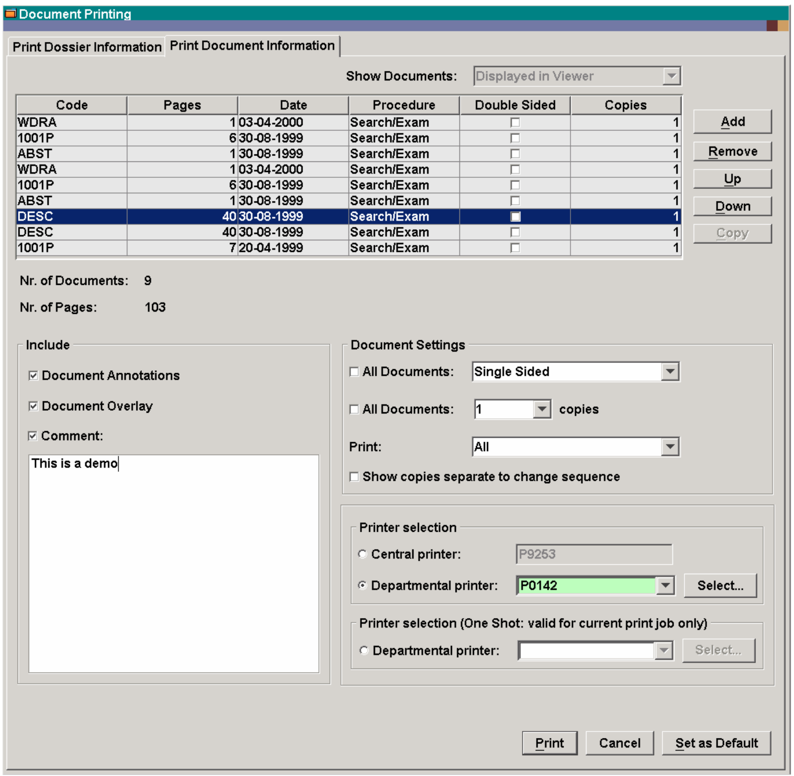


Figure 64: document printing

Either select **Selected in TOC** to print documents pre-selected in the TOC (this is the default) or select **Displayed in Viewer** to print documents displayed in the image Viewer.

A list of documents with their details is displayed. The dialogue also shows the total number of documents selected and the total number of pages.

A further selection can be made for documents in the Viewer, in the **Print** drop-down list under **Document Settings**:

Print document settings	
Field	**Action**
All	Print all documents in the viewer (default)
With Tagged Pages	Print complete documents which have been tagged in the viewer
Only Tagged Pages	Print only pages which have been tagged in the viewer

To print documents in a certain sequence, select a document in the list, then click on the **Up** or **Down** button to move the document. Repeat for other documents until the list is in the required order.

To remove a document from the print list, select it and click on **Remove.**

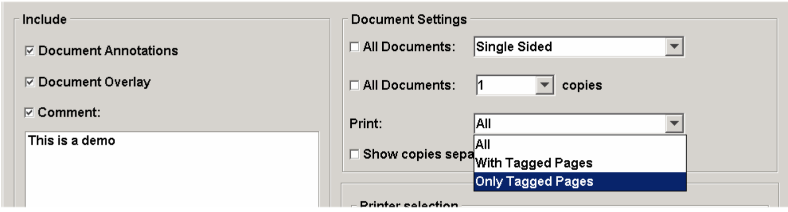


Figure 65: removal of a document from the print list

To add a further document from the TOC or Viewer, depending on the setting already chosen, click on **Add** to see the Add Documents window.

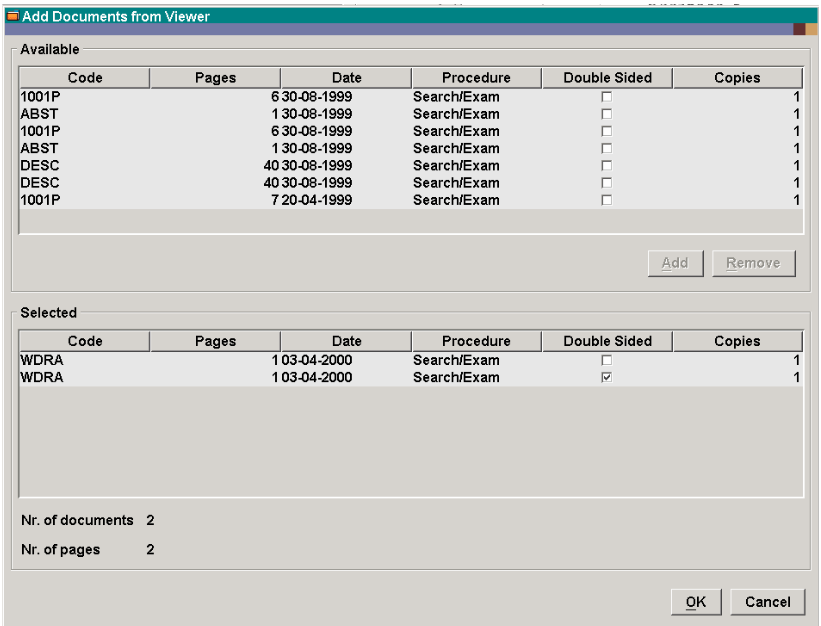


Figure 66: add documents from viewer

To add a document, select the document(s) in the Available list, and click on **Add**.

Remove selected documents by highlighting them and then clicking on **Remove**.

Click on **OK** to return to the Document Printing dialogue.

Include	
Field	**Action**
Document annotations	Prints the DocCode and (if any) document annotations for each selected document on the banner sheet.
Document overlay	Prints each page overprinted with the dossier number, legal date, DocCode, page number and date of printing.
Comment	Type the required comment in the box. This is printed on the banner sheet of the printed output.

Document settings	
Field	**Action**
All documents	All documents are printed single-sided unless double sided is selected. Each document starts on a new page. Use this option to print all documents double-sided or single-sided.
All documents	Select the number of copies of the set. 1 is the default. If more than one copy is selected, the printing is output in sets.
Print	Select which to print: *All*, *With Tagged Pages* or *Only Tagged Pages*
Show copies separate to change sequence	If this option is not selected (the default), copies of documents in the print list are shown simply as a number under the heading Copies. If this option is selected, then copies are shown separately in the list, with full details.

To add extra copies of documents already in the list:

- tick the Show copies separate to change sequence option
- select the document to copy from the list
- click on Copy as many times as you require copies.

The **Copy** button is not available if the **Show copies** option is not selected.

Printer selection	
Field	**Action**
Central printer	Printing on the central printer.
Departmental printer	Printing on the departmental printer. Select the printer from the drop-down list. This list displays the three printers most recently selected with the latest one as default. It is possible to overtype the printer ID in this box. If the required printer is not displayed, click on Select to bring up a dialogue in which you can select a printer from all those available.
Departmental printer (One Shot: valid for current print job only)	This works the same way as the other Departmental Printer option, but it allows for printing a single job to a different printer without changing your defaults. Like the other option, it also remembers the last three choices. This is entirely independent of the other option.

All documents shown in the display window are printed. If no documents are displayed, none are printed.

Click on **Set as Default** to make these settings your default.

To start printing, click on **Print**.

9.2 Printing Dossier information

Information can be printed for the current Dossier:

Choose **Print...** from the **Document** menu. The Print dialogue opens.

Select the Dossier Information tab.

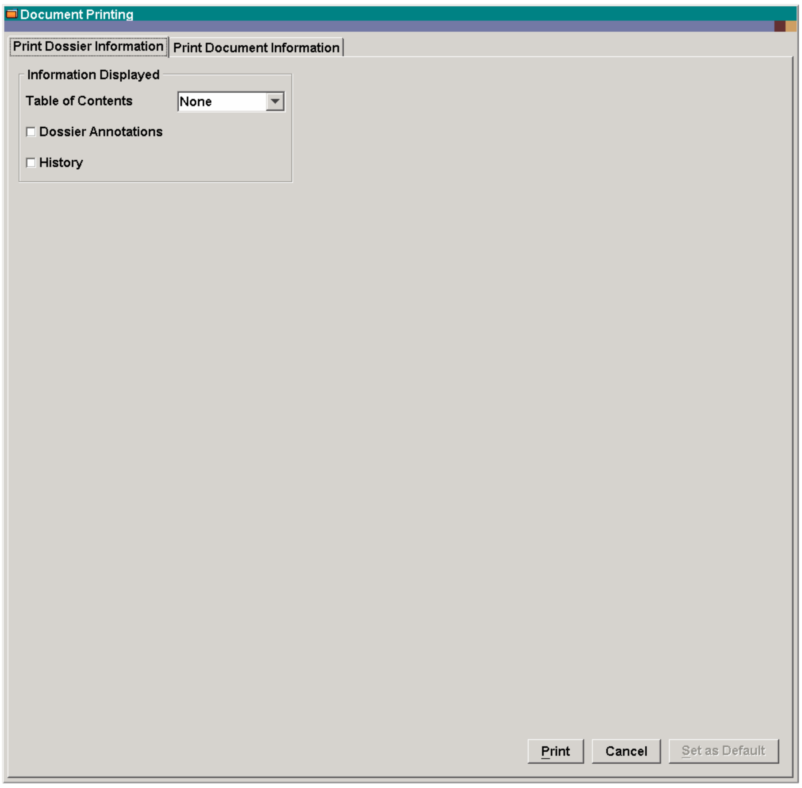


Figure 67: print dossier information

Select an entry for the Table of Contents.

Table of Contents settings	
Field	**Action**
Standard	This is the default. Gives you a print of the TOC with a predefined sequence and number of headings.
Displayed	Prints exactly what you have displayed in the TOC. If you have displayed a large number of headings, the TOC may not print as a coherent list.
Selected	Prints only the documents highlighted.
None	The TOC is not printed.

Select **Dossier Annotations** to print all dossier annotations.

Select **History** to print the History screen.

Click on **Set as Default** to make these settings your default.

Click on **Print**.

9.3 Page printing from the Image Viewer

9.3.1 Overview

It is possible to print

- the current page
- the current document
- tagged pages.

9.3.2 Printing a page

To print the single page currently displayed in the Image Viewer:

- right-click in the **Viewer** window
- choose **Print Page** from the pop-up menu.

The Windows print dialogue appears with the default printer selected. Make any necessary changes and click on **OK.**

9.3.3 Print tagged pages

Tagged pages can be printed:

- right-click in the **Viewer** window
- choose **Print Tagged Pages** from the pop-up menu.

The Windows print dialogue appears with the default printer selected. Make any necessary changes and click on **OK.**

9.3.4 Printing documents from the Image Viewer

This is not recommended from the Viewer, for reasons of speed, but could be used in urgent cases for small documents.

- right-click in the Viewer window
- choose **Print Document** from the pop-up menu.

The Windows print dialogue appears with the default printer selected. Make any necessary changes and click on **OK.**

9.4 Printing paper files

9.4.1 Printing paper files

Paper files can be printed from

- the Mailbox (options 1 and 2 below)
- the Dossier (option 3)
- the Team Manager (option 4)

Note:

Do not print more than about 10 files in one batch, because of system limitations.

To open the Print Paperfiles dialogue:

- option 1:
  - select one or more messages in either your individual mailbox or the Team Mailbox,
  - choose **Print Paperfile** from the **Messages** menu in the Mailbox,**...** The Print Paperfiles dialogue appears with the dossier number(s) already entered for you.
- option 2:
  - choose **Print paperfile...** from the **Messages** menu without selecting any messages in the Mailbox,. The Print Paperfiles dialogue appears without a dossier being selected.
- option 3:
  - choose **Create Paperfile...** from the **Dossier** menu in the Dossier window,. The Print Paperfiles window appears, with the dossier number filled in for you.
- option 4 (for authorized persons only):
  - select one or more messages in the Team Manager,.
  - right-click on the messages. A pop-up menu appears.
  - choose **Print Paperfile...** The Print Paperfiles dialogue appears with the dossier number(s) already entered for you.

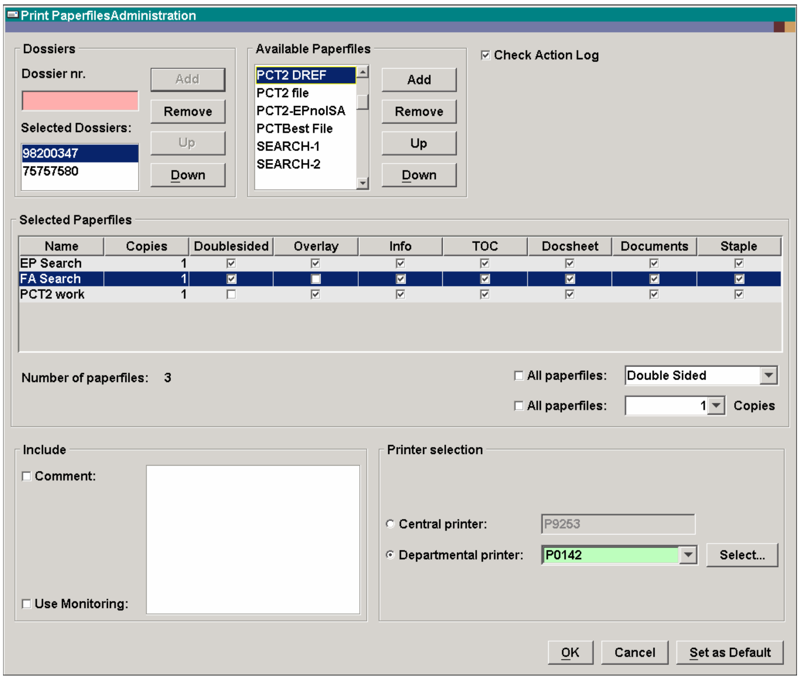


Figure 68: print paperfilesadministration

If no dossiers are selected, or to enter more dossier numbers:

- enter the relevant dossier number by hand under **Dossier nr**. After you have entered a valid number, the box changes from red to green.
- click on the **Add** button.
- repeat for all the required numbers. The numbers you have selected appear in the Selected Dossiers box.

To change the order of the dossiers, if you have entered more than one dossier number:

- select one of the numbers in the list.
- click on the **Up** or **Down** button to move the number up or down in the list.
- repeat this for other numbers until the list is in the desired order.

To delete a number from the list, select it and click on **Remove**. For the numbers entered, the available paperfile types appear in the Available Paperfiles box. The list of available paper files is based on your team and user profile, so if you cannot see the file type you need, please contact your Support Desk.

Select each item required and click on the **Add** button to add it to the list of Selected Paperfiles. The order in which they appear is the order in which they are printed.

Tick-box options	
Field	**Action**
Double-sided	For double-sided, each document starts on a new page.
Overlay	If selected, overlays are printed, otherwise not. Overlays contain Application number, DocCode, Page number, Legal date and Date printed.
Info	Select this to print info sheets.
TOC	Select this to print the Table of Contents.
Docsheet	Select this to print a sheet containing the names of printed documents.
Documents	Select this to print the documents.

To change the order of printing:

- select one item in the Selected Paperfiles list
- click on the **Up** or **Down** button to move the item up or down in the list
- repeat this for other paperfiles until the list is in the desired order.

To delete a paperfile from the Selected Paperfiles list, select it and click on **Remove**.

Additional required information	
Field	**Action**
Check Action Log	The system automatically records, in the Action log, the type of paper file printed, and the date. If this item is ticked, ePHOENIX warns if an attempt is made to print a paperfile that has already been printed.Printing must then be confirmed by clicking on OK.
Number of paperfiles	This displays the number of paper files selected.
All paperfiles:	To print all paper files Single or Double Sided, tick the upper All Paperfiles box, and then select the option. To print the same number of copies of all paperfiles, tick the All Paperfiles box and select the number of copies required (1 to 30).
Comment	Tick this box and type in a comment, if required. The comment appears on the banner sheet.
Use Monitoring	This option sets paperfile monitoring on or off - this enables the system to trace whether the file has • actually been printed • been received. If the option is set to On, receipt has to be recorded manually by the receiving unit. Failure to do so means that the log shows the file as not having been received. Please make sure which setting is correct before using the Print Paperfile function. If in doubt, consult the Support Desk.

C hoose where to print the documents under **Printer selection**.

Printer selection	
Field	**Action**
Central printer	Printing on the central printer.
Departmental printer	Printing on the departmental printer. Select the printer from the drop-down list. This list displays the three printers most recently selected with the latest one as default. The printer ID in this box can be overtyped. If the required printer is not displayed, click on Select to bring up a dialogue in which you can select a printer from all those available.

Click on **Set As Default** if you want the selected options to be used as default for paper file printing.

Click on **OK**.

To set the central printer as the default for paper files, choose **Phoenix Settings** from the **MADRAS** menu, then tick **Central Paperfile Print** on the **General** tab, otherwise the departmental printer is the default printer.

9.5 Print and send

Using the Send function, it is possible to have an outgoing document, which is available in image form, printed with an overlay for the date and the user`s for despatch. At the same time, ePHOENIX closes the original TOC entry, creates a new entry for the outgoing document and soft-copies this document to the ePHOENIX dossier.

Open the dossier and select the document to send.

Choose **Send...** from the **Document** menu. The Send Documents dialogue appears.

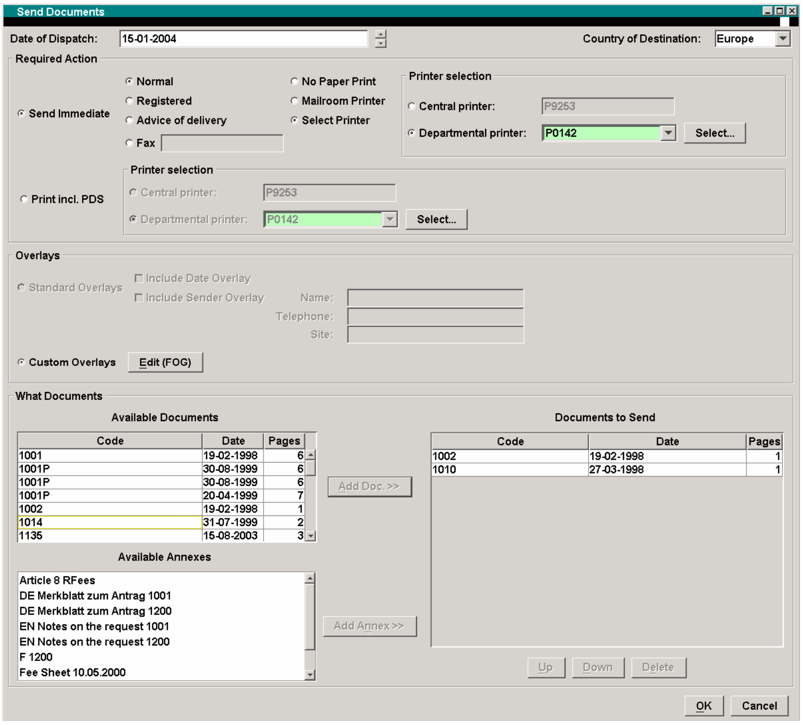


Figure 69: send documents

Select the date of despatch. Depending on the mode of despatch, the system presents a pre-filled date of despatch, which takes account of weekends and public holidays. It is recommended that the user accepts this date. If they do decide to change it, however, all dates are accepted. If there is no tick in the Date Overlay box, they cannot use this option but must use Form Filling instead.

Select the **Country of Destination**. This determines the order in which the documents are printed out for the mailroom.

Select **Send Immediate** if a soft scan to ePHOENIX is required and possible immediately. You must then select the mode of despatch and printing options.

These items are already filled in with defaults specified by the DocCode.

DocCode defaults	
Field	**Action**
Normal	
Registered	
Advice of Delivery	Registered with Advice of Delivery
Fax	Enter the fax number.
No Paper Print	Select if a printed copy is not required.
Mailroom Printer	Select if the copy is to be printed in the mailroom.
Select Printer	Select to choose a printer, and then select Central printer or Departmental printer as described below.
Central printer	Printing on the central printer.
Departmental printer	Printing on the departmental printer. Select the printer from the drop-down list. This list displays the three printers most recently selected with the latest one as default. The printer ID in this box can be overtyped. If the required printer is not displayed, click on Select to bring up a dialogue in which you can select a printer from all those available.

Alternatively, select **Print incl. PDS** option to close the original document, and print the form and a Package Data Sheet to send for scanning. (The form filling facility has made this option largely redundant.) The options for **Print incl. PDS** are the same as for **Printer Selection** above.

If **Standard Overlay** is selected, a Date Overlay and/or a Sender Overlayn can be selected. For a Sender Overlay, the user must check and edit their Name, Telephone and Site, as they will appear on the form. The details are filled in by the system according to the DocCode.

If it is needed to need to add text to the form or cross boxes, the ePHOENIX Form Filling tool FOG must be used. Select **Custom Overlays** and click on the **Edit (FOG)** button.

ePHOENIX displays

- the document selected in the TOC, normally an outgoing form, under **Documents to Send,**
- other documents in this dossier under **Available Documents,**. To add more documents to the To Send list, select them and click on **Add Doc.**

  Documents can be removed from the To Send list. Select them and click on **Delete**. (cannot remove the original document.)
- annexes available to send under **Available Annexes,**. To add more annexes to the To Send list, select them and click on **Add Annex**.

  Annexes can be removed from the To Send list. Select them and click on **Delete**.

To change the order of printing of the documents:

- select a document in the Send List.
- click on **Up** or **Down** until it is in the required position in the list.
- repeat for other documents until the list is in the desired order.

Click on **OK** to send the documents.

A confirmation dialogue box appears. Click on **Yes**.

The original TOC entry then closes. If Send Immediate was selected, a new TOC entry in grey appears with the date of despatch. This turns to the appropriate colour when the importing of the image, together with overlays, is complete. The document is printed out.

9.6 Stamp and print

This function enables stamping of a standard overlay onto the image, make a soft copy of this image and print it out, if desired, on a departmental printer.

Either select the document(s) in the TOC or open the document(s) in the Viewer. Choose **Stamp...** from the **Document** menu. The Stamp Documents dialogue appears, showing the document selected in the TOC.

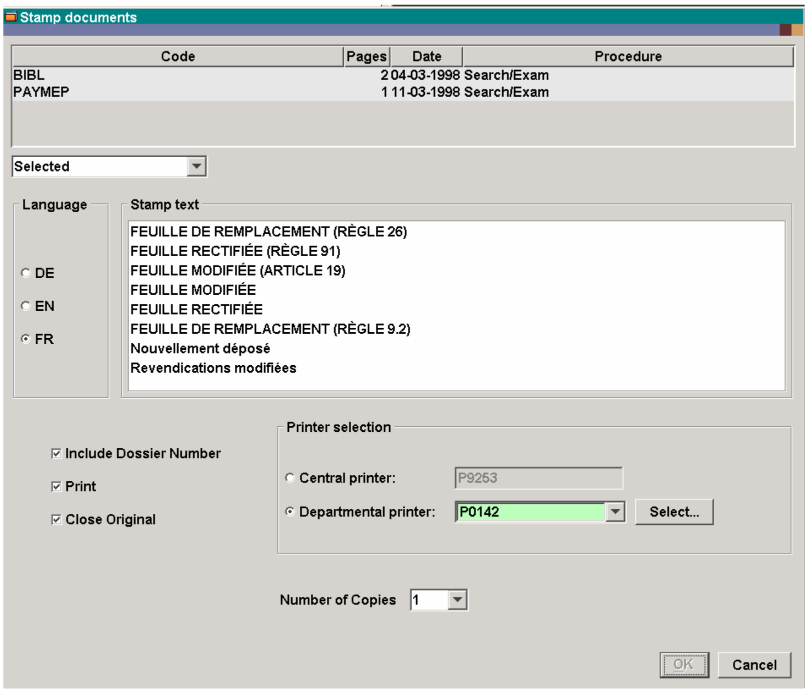


Figure 70: stamp documents

Select an option from the drop-down list.

Drop-down list options	
Option	**Action**
Selected	Stamp the documents selected in the TOC.
In Viewer	Stamp the documents shown in the Viewer.
With tagged pages	Stamp documents with tagged pages.

Select the required language, then highlight the required text by clicking with the mouse. The options here depend on your Office.

To stamp the dossier number on the document as well as the chosen text, select **Include Dossier Number**.

If a print of the document is required, tick **Print**. Removing the tick disables the print option.

Choose where to print the documents under **Printer selection**.

Printer selection	
Field	**Action**
Central printer	Printing on the central printer.
Departmental printer	Printing on the departmental printer. Select the printer from the drop-down list. This list displays the three printers most recently selected with the latest one as default. The printer ID in this box can be overtyped. If the required printer is not displayed, click on Select to bring up a dialogue in which you can select a printer from all those available.

Select the **Number of Copies** to print.

Click on **OK** to complete the procedure.

9.7 Print Jobs

To check the status of print jobs you have submitted to the system, choose **Print Jobs** from the **MADRAS** menu.

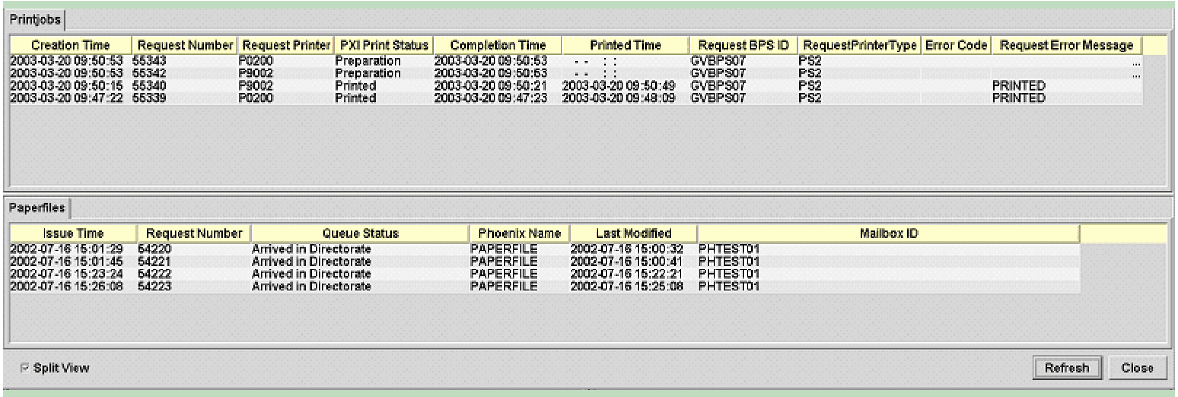


Figure 71: print job status

The Print Jobs dialogue lists the print jobs sent to the LAN printer only:

- under the Print Jobs tab: prints originating from printing of documents, including those related to Send and Stamp operations, but also the associated softscans (the direct electronic transfer of the modified document to the ePHOENIX image archive.
- under the Paperfiles tab: prints any paperfiles ordered.

Local prints are not listed.

If the Split View box is ticked, the Paperfiles and Print Jobs tabs are both shown. If not, only one is shown at a time.

If any print jobs seem to fail or incur an overly long delay, contact your Support Desk, giving the Request Number shown against the job.

To update the display, click on **Refresh**.

To close the dialogue, click on **Close**.

9.8 Printer selection

There is the option to select a printer whenever sending a printing job to a LAN printer, as opposed to the local desktop printer, is possible.

Click on the **Select...** button wherever it appears (for example, in the **Print**, **Send** and **Stamp** screens).

Follow the on-screen instructions till you have selected the printer required.

Click on **OK**. The selected printer is entered into the Departmental Printer field of the Printer Selection area.

If the printer number is known it is also possible to type it into this box. The box turns green if the number typed is on the list of known LAN printers, and remains orange otherwise.

9.8.1 Images are not in PXI

If one or more documents are not available in PXI, ePHOENIX informs you which document(s) cannot be found by displaying the corresponding viewer tab(s) in red.

10 Working with forms and annexes

10.1 Forms

To use forms within ePHOENIX, open the relevant Dossier in the TOC, and choose **Send** from the **Document** menu.

Forms are generated by legacy systems and printed out either in a batch program or individually by the user. They can be divided broadly into two categories:

- outgoing forms
- internal forms.

In addition to processing batch output, it is possible to order forms from a legacy system through the emulator for import into ePHOENIX (soft-scanning).

10.2 Internal forms

Internal forms can be classified in two categories:

- forms for information; these are simply file copies and require no manipulation
- forms for completion and sending to, for example, an examiner. These often need to be rescanned when returned with information added.

10.3 Outgoing forms

10.3.1 Types of outgoing forms

Outgoing forms can be classified into three categories:

- forms that are despatched automatically; these are simply file copies and require no intervention by support staff (the date is pre-filled)
- forms that need no added information, apart from the date, but must be despatched to the applicant
- forms that need information to be added, in addition to the date, before despatching to the applicant.

10.3.2 Automatic forms

The form is generated by the procedural system, and ePHOENIX prints the form together with date of despatch, seal, name of Formalities Officer etc. at the postroom for automatic despatch. A copy of the form is placed on the ePHOENIX file, but no message is generated because no further action is required.

10.3.3 Forms with no data added

An image of the form, without date or other details, is imported into ePHOENIX.

Decide whether the form should be sent. If not, then close the document.

If the form is to be sent, highlight the form in the TOC.

Choose **Send...** from the **Document** menu in the Dossier. When **Send...** is invoked, ePHOENIX

- closes the original entry in the TOC.
- creates a new entry in the TOC for the newly created document, if Send Immediate was selected
- prints the form, plus annexes, with an overlay
- it imports the form, including overlay, to the ePHOENIX dossier, if Send Immediate was selected.

The following overlays are available:

- date of despatch
- posting date
- name, location and phone number of user.

If the relevant item is not ticked in Standard Overlays, the overlay has not been defined and will therefore not be printed.

10.3.4 Forms with data added

An image of the form, without date or other details, is available in ePHOENIX and a message generated for the document.

Decide whether the form should be sent. if not, then close the document.

Highlight the form in the TOC.

Choose **Send...** from the **Document** menu in the Dossier. Check that Registered or Normal Mail is correctly selected (this aids sorting in the mailroom)

Check that that the date shown is a working day, and select a working day if it is not.

Select the mailroom printer, if applicable.

Select the departmental printer, if applicable.

Select No Paper Print for internal forms, or if you want only to add text to the form.

Select Custom Overlays, then click on Edit (FOG). The form filling screen appears. If no image appears, it may not be available in the image archive.

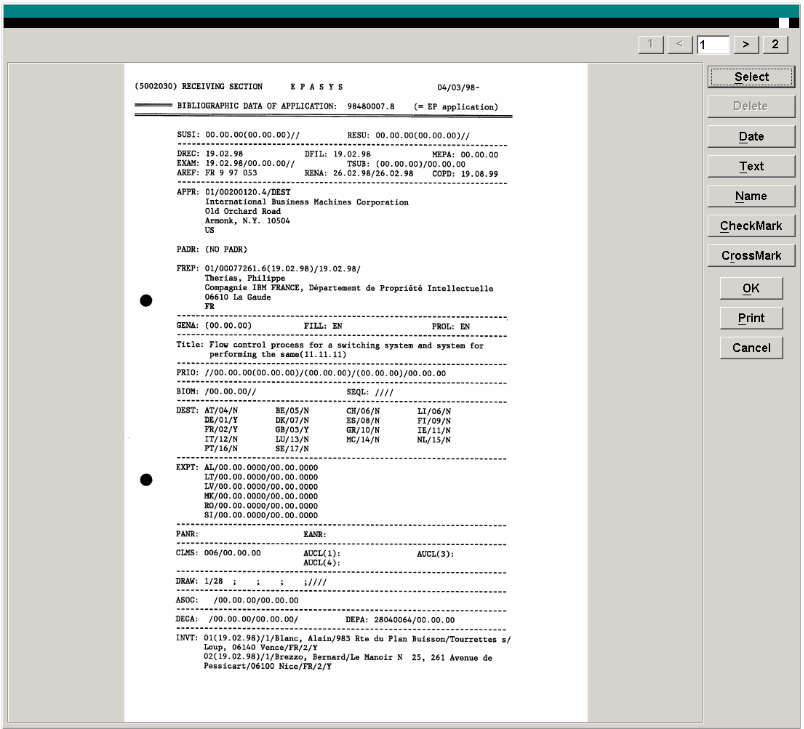


Figure 72: form filing screen

Add details to the form as necessary:

To add a date:

- click on the **Date** box at the top right of the displayed image.
- release the mouse button and move it to the date field on the form.
- click the left mouse button in the date field (the mouse pointer shows the bottom left corner of the displayed date). This places the date in the form.

To insert a cross in a box:

- click on **CheckMark** (for a tick) or on **CrossMark** (for a cross) at the top right of the displayed image.
- release the mouse button and move it to the box on the form.
- click the left mouse button in the box. This places the mark in the form.

To insert free text:

- click on **Text** at the top right of the displayed image.
- release the mouse button and move it to the required position on the form.
- click the left mouse button, making sure there is sufficient space for your comment. A small window pops up for entering the text.

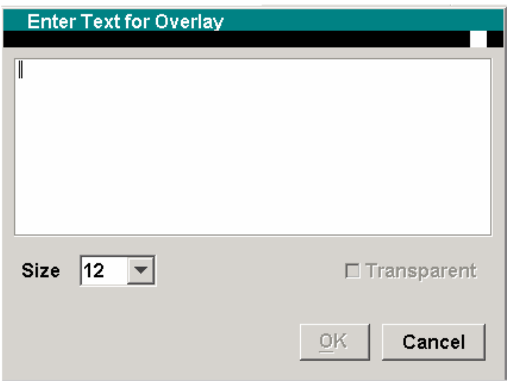


Figure 73: enter text for overlay

- type in the required text.
- select a different font size if necessary. (Transparent is not used at present.)
- click on **OK** to enter the text. It appears in red on the document image.

Check that all overlays are correctly positioned. If not, click on **Select**.

To move the overlay:

- point the mouse at the overlay.
- hold down the right mouse button and drag the overlay.

To edit the overlay:

- point the mouse at the overlay.
- click the right mouse button.
- select **Edit** from the pop-up menu. The text box appears (as in step 7).
- edit the text and click on **OK.**

To delete the overlay:

- point the mouse at the overlay.
- click the right mouse button.
- select **Delete** from the pop-up menu. The overlay is deleted immediately.

To print a hard copy, click on **Print**. A copy is printed on your desktop printer.

Only the page being viewed will be printed. For more pages, go to each page in turn (click on the right arrow at the top of the screen) and choose **Print** again.

Make sure that:

- the seal is present, or the user`s name added by free text
- there is no data to be added on other pages of the form.

Click on **OK** to return to the **Send** dialogue.

If the date in the **Send** dialogue is changed, select **Edit (FOG)** again, and change the date overlay by deleting the old date and adding the new one.

It is possible to make a hard copy print direct from the FOG screen to your desktop printer and then use the **No Paper Print** option for the file copy.

10.4 Standard annexes

Standard annexes are documents that are not part of the dossier, but are needed for general use in the procedure. They can be attached as annexes to outgoing forms in the **Send** function.

11 Document controls

11.1 Overview

All documents in ePHOENIX have a document code (DocCode). These DocCodes are listed in the database in a Document Control Table that specifies attributes of the document, such as:

- public
- scanned
- generate message
- group
- to be published.

Various ePHOENIX tools use this table to retrieve data to be displayed or to determine which actions should be taken.

A DocCode is allocated to an incoming document during indexing and before it is scanned in order to:

- route the document to the correct mailbox
- identify the document within the dossier
- enable ePHOENIX to perform automatic actions.

For incoming documents, DocCodes are allocated by the receiving officer. When outgoing or internal communications are created either by a system or by an officer, the officer concerned is responsible for the indexing.

In all cases, the officer is responsible for checking the DocCode and updating it if necessary. You should decide whether the preliminary DocCode gives sufficient information in the TOC to properly identify the document. You can also give more information using a document annotation.

11.2 Routing of documents

DocCodes tell the system if documents are, for example, public, for publication, incoming, outgoing, or if they belong to particular procedures, such as Search/Exam, Opposition, PCT. One of the attributes that can be specified is create message, so that a DocCode with that attribute will always generate a message when the document is created.

ePHOENIX uses DocCodes to recognize where a document should be routed.

11.3 Automated functions

Some functions in ePHOENIX are automated, such as printing a paper search file or publication. For these functions, ePHOENIX looks for documents with certain codes and/or attributes, and performs defined actions on them.

12 File inspections

12.1 Preparation for file inspections

Messages are sent to the appropriate mailboxes. The relevant documents are printed out from ePHOENIX.

12.2 Making files available

12.2.1 File inspection on the premises

At the appropriate date, the requester presents his ID and authorization. A paper copy of the file printed out from ePHOENIX is presented to the requester for inspection.

12.2.2 File inspection by copies

A copy of the requested documents printed out from ePHOENIX is sent to the requester at the address given.

12.2.3 Models

It must be determined whether any models have been filed by selecting the Cover and checking for the presence of a MODEL label.

To find the location of the model either choose **Details** from the **Document** and then select the **Status** tab or go to the document called MODEL.

If the model is sent to the Info Desk:

- choose **Details** from the **Document** and then select the **Status** tab.
- enter the details of the addressee.

When the model is returned:

- choose **Details** from the **Document** and then select the **Status** tab
- update the details.

13 MADRAS settings

To change the MADRAS settings, choose **Settings** from the **MADRAS** menu:

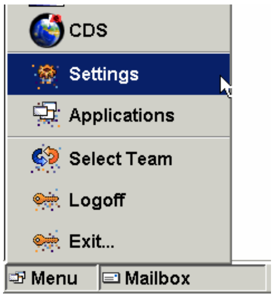


Figure 74: MADRAS menu

The dialogue box that appears has a number of tabs. The tabs that you see depend on your user profile.

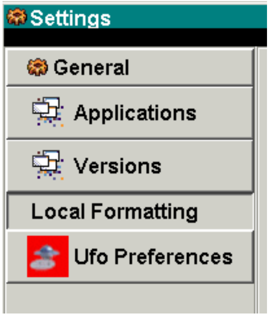


Figure 75: MADRAS settings

13.1 Settings

13.1.1 General

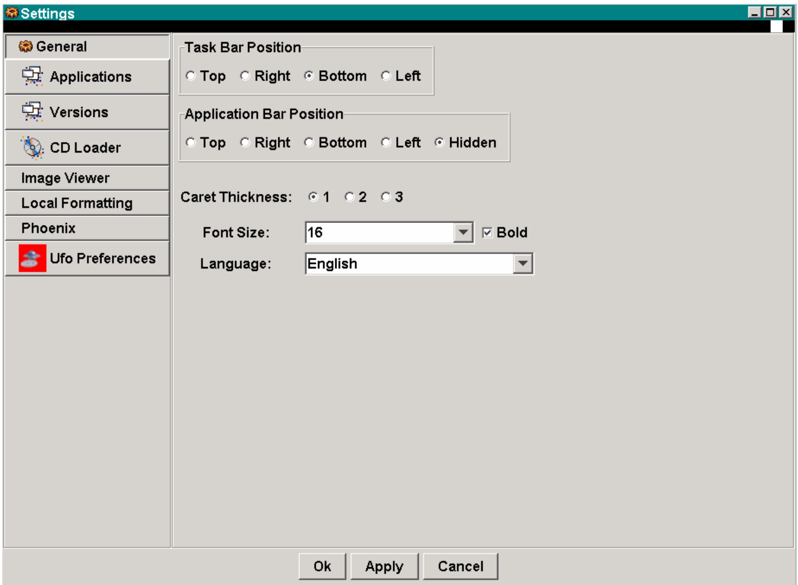


Figure 76: MADRAS general settings

MADRAS general settings options	
Field	**Action**
Taskbar Position	Position the MADRAS Taskbar in the MADRAS window: Top, Right, Bottom or Left. The default is Bottom.
Application Bar Position	Position the MADRAS Application Bar in the MADRAS window: Top, Right, Bottom, Left or Hidden. The default is Hidden.
Caret Thickness	The thickness of the flashing cursor symbol in any entry field waiting for user input. It can be set at 1, 2 or 3 pixels.
Font Size	The size of the text in MADRAS windows and dialogue boxes, expressed in points The default is 16pt.
Bold	When this is ticked, the text in MADRAS windows and dialogue boxes is shown in bold type. This is the default.
Language	Selects the language used to display the MADRAS interface.

13.1.2 Applications

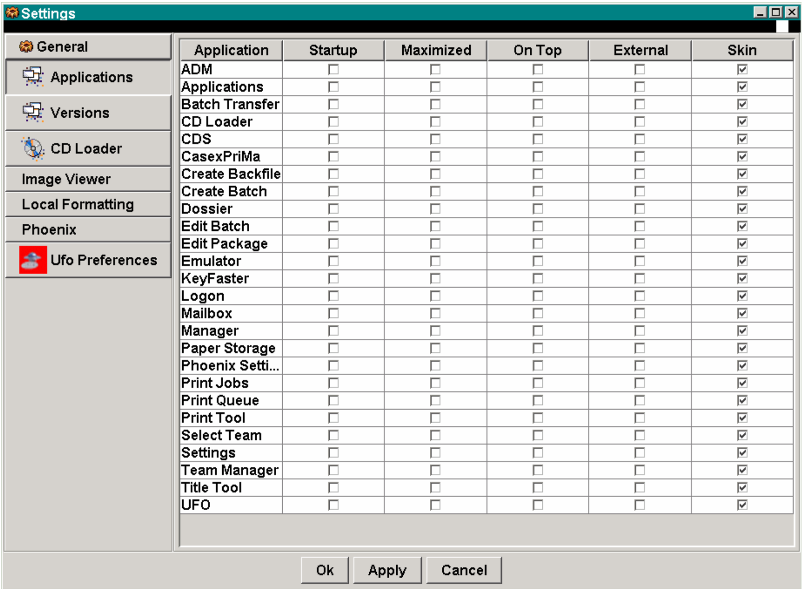


Figure 77: MADRAS application settings

MADRAS application settings options	
Field	**Action**
Application	This is the name of the tool or window.
Startup	When this is ticked, the tool opens automatically when the user starts MADRAS.
Maximized	When this is ticked, the window is maximised when the user opens it.
On Top	When this is ticked, the window always opens on top of other windows.
External	When this is ticked, the window always opens as a separate window on their Windows desktop, not inside the MADRAS window.
Skin	This is on by default. It displays a coloured identification bar under Title bar of the program.

13.1.3 Versions

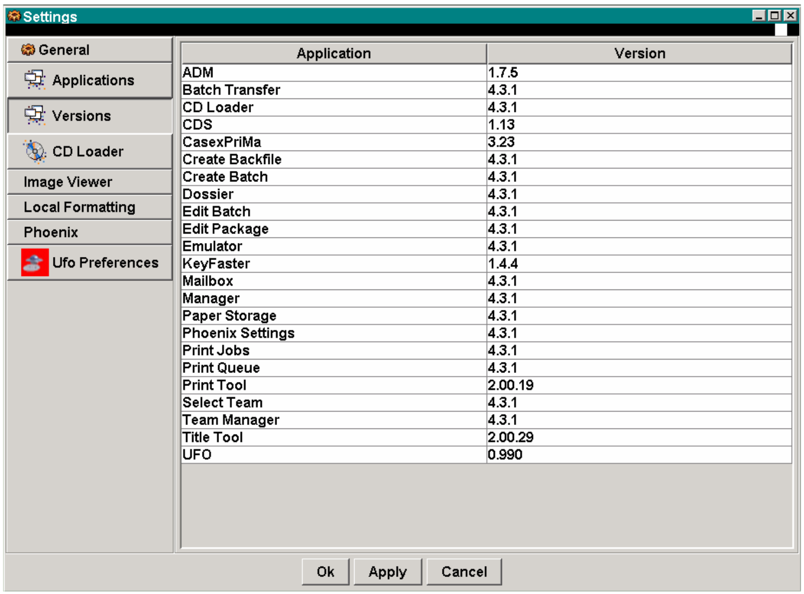


Figure 78: MADRAS versions settings

This dialogue displays the version numbers of all the tools in the MADRAS set.

13.1.4 Local formatting settings

These options are available only if the user has a User profile authorized to access them.

13.1.5 Phoenix

These options are available only if the user has a User profile authorized to access them. They refer to visualisation settings.

13.2 Menu

13.2.1 Phoenix

These options are available only if the user has a User profile authorized to access them. They refer to operational settings.

Glossary

Glossary	
Abbreviation	**Meaning**
TOC	Table of contents

Index