



Internet marketing





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Table of Contents

Thank you for choosing Document Manager lite v5.2!.....	4
What Can Document Manager <i>lite</i> v5.2 do for you and your clients?	4
What's new in Document Manager lite v5.2?	4
SEO Fields for Documents and Categories	4
New Placeholders	4
New Back-End Document Search	5
Section 1: The Document Manager lite Front-end Interface	6
The Category Detail List	7
The Document Detail Page.....	8
Uploading Documents	8
Section 2: Customizing Settings.....	9
Configuring Document Manager <i>lite</i> Access.....	9
Setting Category and Document Layout	9
Specifying a Document Sort Order	9
Section 3: Managing Document Categories	10
Adding a New Category	10
Editing a Category.....	12
Deleting a Category.....	12
Deleting Category Contents	12
Moving Contents into a Different Category	13
Adding Subcategory Details	13
Changing the Document Category Sort Order	13
Viewing Subcategories	13
Section 4: Managing Documents	14
Adding a New Document	14
Editing a Document	16
Deleting a Document	17
Section 5: Viewing Reports.....	18
Viewing Category Reports	18
Viewing Document Reports	18
Section 6: Managing Document Manager Lite Pages	20
Configuration Steps.....	20
Section 7: Document Manager Lite Integration.....	22
Integrating the Document Manager Lite Application.....	22
Section 8: Internet Marketing Toolkit Integration.....	23
Adding the Internet Marketing Module	23
Section 9: Talk to Us	24
Section 10: The Web Content Editor Toolbar Page	25
Index	26



Thank you for choosing Document Manager lite v5.2!

The **Document Manager *lite*** is a ready-built solution for sharing and accessing documents and files between internal employees, external workers, business partners, and document collaborators within a centralized, secure environment. Authorized users have secure access to important files, anytime, anywhere! Running within the powerful, industry-standard ASP.NET architecture, its robust performance and ease of future enhancements are just a few of the reasons why this module adds to your website's usability and interactivity.

Manage your documents and store them all within a central repository with the **Document Manager *lite***. Create a category tree structure to build a logical content management system within the module that allows for easy document retrieval and files in all formats.

The familiar interface allows users to start using the **Document Manager *lite*** right away, with virtually no learning curve. All a user needs is a basic familiarity of the Web and Web applications, and they are ready to view, upload, and download documents in no time!

There are many advantages to using an online document management tool over a folder system:

It ensures that a standard is met and maintained, and therefore help ensure the quality and consistency of the team's work.

A limited amount of information can be conveyed in a file name, and a lot of time can be lost, as the folder system grows, opening and closing "the wrong file". The **Document Manager *lite*** uses links within descriptive explanations, so that new users can quickly scan the page and identify just the right document to open.

The **Document Manager *lite*** can be configured to send an automated notification E-mail to the Site Administrator once a file is uploaded, functionality that is unavailable within a folder system.

What Can Document Manager *lite* v5.2 do for you and your clients?

The **Document Manager *lite*** allows you to share documents and files quickly without the need to purchase, configure or maintain a firewall or a Virtual Private Network (VPN).

It can increase productivity and reduce costs – internal and external stakeholders are easily able to share and collaborate on documents, files, databases, tasks, and online discussions.

The **Document Manager *lite*** allows the Site Administrator full control of module settings through the Administration Panel, which uses the familiar and easy to learn Graphical User Interface (GUI) of our full suite of products.

Site visitors and authorized users can easily view, edit, upload, and download documents from anywhere, whether it be in the office, offsite or on the road.

What's new in Document Manager *lite* v5.2?

SEO Fields for Documents and Categories

Search Engine Optimization fields have been added to the document and category detail pages, ensuring search engines index documents and category pages correctly.

New Placeholders

The **Category** page now has a placeholder for the addition of a "bread crumb" trail on the front-end. All pages now let you place a logout placeholder that allows the user to logout from the front-end page.



New Back-End Document Search

When you click on the **Documents** link, you will be presented with an enhanced search dialog, allowing you to filter the list of documents based on a number of criteria.



Section 1: The Document Manager lite Front-end Interface

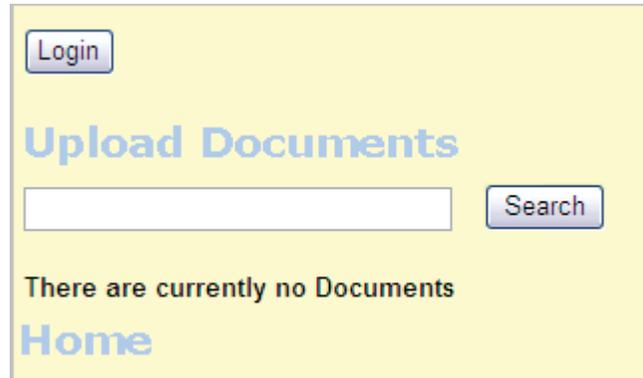


Figure 1-1 Login Page

The **Document Manager *lite*** v5.2 has a graphical interface that is easy to learn and use, offering your site visitors and users a familiar and consistent environment that allows them to upload, view and download documents easily and with confidence.

The **Site Administrator** can configure **Document Manager *lite*** settings in the **Admin Panel** to allow access to all site visitors or to registered users only. If the **Document Manager *lite*** is password-protected, users must login with a valid username and password at the **Login Page** (Figure 1-1) to view **Document Manager *lite*** contents. However, if there are documents or categories of a general nature that the **Site Administrator** would like unrestricted access to, he can configure these to be displayed using the **Everyone** user group (Please see **Allowing Public Access**).



Figure 1-2 Main Page

If the **Document Manager *lite*** is configured for unrestricted access, the **Document Manager *lite*** **Main Page** (Figure 1-2) will be displayed.

Users can view categories, category images and category descriptions from the **Document Manager *lite*** **Main Page**. To view the contents of a category, a user clicks on a category name, which opens to

a **Category Detail Page** (Figure 1-3), displaying the list of documents belonging to that category. Users can also search for documents using the handy **Search** function.

The Category Detail List



Figure 1-3 Category Detail List

When a user clicks a category or subcategory name, the **Category Detail List** is displayed, displaying the contents of the category, with a short description, a thumbnail image and the date the document was uploaded.



The Document Detail Page

Category Please Select... ▼

Date 10/27/2005

English

Same as Spanish Same as French

Name

Description

File Browse...

Spanish

Same as English Same as French

Name

Description

File Browse...

Add New Document

[Home](#)

Figure 1-4 Document Detail Page

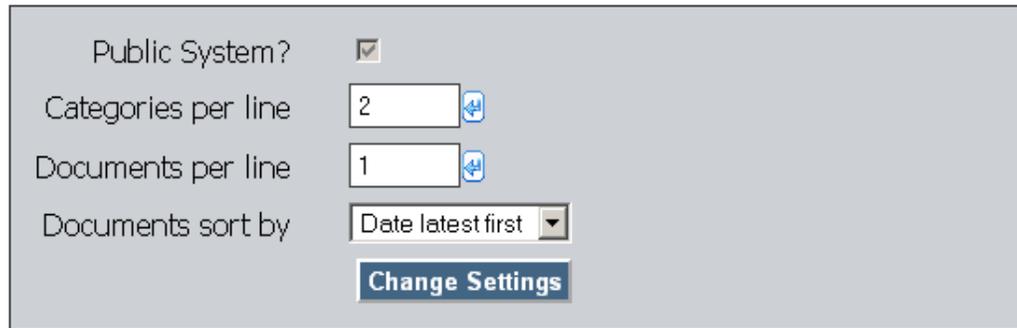
Clicking on a document name in the **Category Detail List** opens the Front-End **Document Detail Page**. To download the document, the user clicks on the **Download Document** hyperlink. A **File Download** dialog box will open and the user saves the file to their local drive.

Uploading Documents

User groups with **Allow Write** access rights can upload documents by clicking **Upload Documents**. This opens the **Upload Detail Page**. The user enters the document name, description, and uploads the file to the Web server.

Section 2: Customizing Settings

Document Manager Settings



The screenshot shows the 'Document Manager Settings' page. It contains the following fields and controls:

- Public System?**: A checkbox that is checked.
- Categories per line**: A text input field containing the number '2'.
- Documents per line**: A text input field containing the number '1'.
- Documents sort by**: A dropdown menu with 'Date latest first' selected.
- Change Settings**: A blue button with white text.

Figure 2-1 Settings page

Select the **Settings** link from the right-hand **Main Menu**. The **Settings** page (Figure 2-1) will be displayed. The **Settings** page allows you to manage site layout, configure access rights, and customize upload options.

Configuring Document Manager *lite* Access

Allow public access to **Document Manager *lite*** files by checking the **Public System?** checkbox. This box is unchecked by default, requiring all users to have a valid login to view files. If you enable login, you will need to ensure you've added and configured the Intranet Login module via OpenSites. From your Admin page, select the **Intranet Login** option and place **[P:login]** tag on one of your pages.

Setting Category and Document Layout

To set the number of categories and documents per line to be displayed on a page, enter a number in their respective textboxes. For example, entering a value of **2** in the **Categories Per Line** field and a value of **2** in the **Documents Per Line** field will display two categories per page, with two columns of documents each.

Specifying a Document Sort Order

To specify a document sort order, select an option from the **Documents Sort By** field. Select from **Sort Order**, **Name**, **Date Latest First**, and **Date Oldest First**. Selecting **Sort Order** follows the sort order specified in the **Document Categories page**. Selecting **Name** will sort documents alphabetically, selecting **Date Latest First** will display newest documents first, and choosing **Date Oldest First** will display oldest document first.



Section 3: Managing Document Categories

Document Categories

Main Category

Name	Code	Picture	Order			
2008 Reports	2008R		<input type="text" value="10"/>	View subCategory	View documents of this category	 
2009 Reports	2009R		<input type="text" value="10"/>	View subCategory	View documents of this category	 

 Add New Category | [Update Sort Order](#)

Figure 3-1 Document Categories page

After configuring general Document Manager settings, you can start creating document categories to hold subcategories or groups of similar documents. Create a list of main categories and subcategories and organize these in a directory structure. Within the **Document Categories page** (Figure 3-1), you can create, edit, and delete categories and manage category levels.

Adding a New Category

- 1) From the right-hand **Main Menu**, click **Document Categories**. The **Document Categories** page will open (Figure 3-1).

English (US)

Name

Description

Title

Keywords

Seo Description

url

Code

Parent Category

Sort Order

Picture

[+ Add New Category](#) | [◀ Back to Categories](#)

Figure 3-2 Category Details Page

- 2) To create a new category, click **Add New Category**. The **Category Details Page** appears (Figure 3-2).
- 3) Enter the information needed in the following fields:

Detail	Description
Name	Enter a category name. Text in this field will be displayed as a hyperlink in the Document Manager Front-End Interface opening the Category page.
Description	Create a short category description to appear under the Category Name hyperlink.
Title	Enter the title that will appear in the browser title bar.
Keywords	Enter keywords associated with this category for Search Engine Optimization (SEO) purposes.
SEO Description	Enter a summary for this category. The description will generally be used by search engines in the results as a page summary.



Detail	Description
URL	Enter the final block of text for the page name in the URL. This is optional. However, an accurately named URL helps with SEO. Do not use spaces. Only use letters, numbers, and dashes/underscores. For example, "2009_reports".
Code	Enter a category code for easy reference.
Parent Category	Assign the category to a parent category in the hierarchy. Select a parent category from the drop-down menu. Choosing Main Category creates a category with no parent.
Sort Order	Establish a sort order for a category by entering a numeric value in this field. A sort order value of 1 will place the category as first in the list; a sort order value of 2 will place that category second, and so on.
Picture	You can upload an image for a category – this picture will appear beside the Category Name hyperlink in the Front-End Interface. Click Browse to access the folder where the image file is located. Select the file and click Open . Check the Delete Image checkbox to delete an image.

- 4) Click the **Add Info** button.

Editing a Category

- 1) Go to the **Document Categories page** (Figure 3-1) and find the name of the category you would like to edit from the main **Document Categories List**. Click on the **Magnifying Glass** icon assigned to the category. This opens the **Category Detail Page** (Figure 3-2).
- 2) Edit the necessary fields and click **Update Info** to save your changes.

Deleting a Category

- 1) From the right-hand **Main Menu**, click **Document Categories**.
- 2) Find the category name in the **Document Categories page** and click the **Delete** icon assigned to it. A confirmation window will appear.
- 3) Click **OK**. The selected category will be deleted from the list.

Categories that contain subcategories or documents will not be deleted automatically. You can do one of two things: delete the contents of the category entirely or move the contents into a different category.

Deleting Category Contents

- 1) To delete the category's contents, find the subcategory or product you would like to delete.
- 2) Click the **Delete** icon assigned to it.

- 3) Click **Apply**. The subcategory (or document) will be automatically deleted. You will be redirected to the updated **Document Categories page**, confirming that the category has been deleted.

Moving Contents into a Different Category

- 1) To move the category's contents, find the subcategory or document you would like to move and select the destination category from the drop-down list assigned to it.
- 2) Click **Apply**. The subcategory (or product) will be automatically moved. You will be redirected to the updated **Document Categories page**, confirming that the category has been deleted.

Adding Subcategory Details

- 1) To create a new subcategory, find the category name you would like the subcategory to belong from the **Main Document Category Menu**.
- 2) Click **Add New Category**. The **Subcategory Details Page** will be displayed.
- 3) Enter the information needed.
- 4) Click on **Update Info**. The message **Info Updated Successfully** will appear on top of the page and the newly-created category will be displayed in the **Categories Menu**.

If you have configured your website to display in multiple languages in OpenSites, the **Category Detail Page** will display the **Name** and **Description** fields in each language.

Changing the Document Category Sort Order

The sort order is the order document categories appear in your website. Establish a sort order for a category by entering a numeric value in the **Order Field** in the **Document Categories List**. A sort order value of **1** will place the category as first in the list; a sort order value of **2** will place that category second, and so on.

After you have made category sort order changes, click **Update Sort Order** to refresh the sort order status.

Viewing Subcategories



Main Category > 2008 Reports

Name	Code	Picture	Order			
Public			<input type="text" value="10"/>	View subCategory	View documents of this category	 
Private			<input type="text" value="10"/>	View subCategory	View documents of this category	 

 [Add New Category](#) | [Update Sort Order](#)

Figure 3-3 A Subcategory Page

Within the Document Manager **Document Categories page**, click **View Subcategory** (Figure 3-3) to view the next subcategory level. You can easily navigate between categories by using "bread crumb" trail found on top of the page.



Section 4: Managing Documents

Documents

Keyword

Category

- 2008 Reports >> Public
- 2008 Reports >> Private
- 2009 Reports
- 2009 Reports >> Private

Date From To

Language

Active Upload Documents

Name	Date	Active	Upload Documents	
Product Risks	3/24/2009	True	False	
Annual Report 2008	3/26/2009	True	False	
Meet the Staff	3/26/2009	True	False	

|

Figure 4-1 Documents page

After creating a category tree structure, you can now assign documents to categories and subcategories. In the **Documents page**, you can view, add, and move documents and edit document details. The **Documents page** opens (Figure 4-1).

Adding a New Document

- 1) From the **Documents** page, find the category name you would like the document to belong. Click the **View Documents of this Category** link assigned to it. This opens a list of the category's documents and subcategories.

Document

Category: 2008 Reports >> Private

Date: 2009-03-24 

Active:

Sort Order: 10

English (US)
 Same as Portuguese

Name: Product Risks

Title: 2008 Risks

Keywords: risks, 2008, private, finance

Seo Description: Risks to our product lines.

url: 2008_risks

Description:


A complete outline of risks to our product line. These include risks posed by competitors as well as risks generated internally.

Assign a file by using only **ONE** of the options below:

Upload File Path: D:\temp\103605271.xls

File Name or External Link:

Select:

[Add New Document](#) | [Back to Documents](#)

Figure 4-2 Document Detail Page

- 2) Click **Add New Document**. The **Document Detail Page** (Figure 4-2) opens.
- 3) Enter the information needed in the following fields:

Detail	Description
Category	Select document's category from the category list.
Date	Click the Calendar icon to change the document's upload date. The current date is displayed by default.
Active	Check this box to change the document's status to Active . Active documents are displayed in the front-end document list. This box is checked by default.



Detail	Description
Sort Order	Establish a sort order for a document by entering a numeric value in this field. A sort order value of 1 will place the document as first in the list; a sort order value of 2 will place that document second, and so on.
Name	Enter a document name. Text in this field will be displayed as a link in the front-end interface, leading to a download link page.
Title	Enter the title that will appear in the browser title bar.
Keywords	Enter keywords associated with this document for Search Engine Optimization (SEO) purposes.
SEO Description	Enter a summary for this document. The description will generally be used by search engines in the results as a page summary.
URL	Enter the final block of text for the page name in the URL. This is optional. However, an accurately named URL helps with SEO. Do not use spaces. Only use letters, numbers, and dashes/underscores. For example, "2009_reports".
Description	Create a document description to appear within the front-end document detail page. Use the Web Content Editor (WCE) tools to format layout and appearance.
File	Upload the document by using the Browse button to locate the file. Select the file and click Open .
Select	Use the drop-down box to select a file

- 4) Click the **Add Info** button.

Editing a Document

- 1) From the right-hand **Main Menu**, click **Documents**. The main **Documents page** (Figure 4-1) will appear.
- 2) By default the **Documents** page will list documents uploaded in the last month. You can use the search dialog at the top of the page to widen or narrow the list of documents to display.

Search Control	Description
Keyword	The keyword field only searches on terms in the document name field.
Category	You can select more than one category in the Category list box.

Search Control	Description
Language	If you've configured OpenSites to operate in more than one language, select the language.
Active	Click the Active checkbox to search for active documents.
Upload Documents	Click the Upload Documents checkbox to search for only documents uploaded by front-end users. Documents that were uploaded are also flagged as "True" in the document table's Upload Document column.

- 3) Click the **Search** button to apply your criteria.
- 4) To edit a document, click on the **Magnifying Glass** icon assigned to the document. The **Document Detail Page** (Figure 4-2) will be displayed. Edit the necessary fields, and click **Update Info** to save your changes.

Deleting a Document

- 1) From the right-hand **Main Menu**, click **Documents**. The main **Documents page** (Figure 4-1) will appear.
- 2) By default the **Documents** page will list documents uploaded in the last month. You can use the search dialog at the top of the page to widen or narrow the list of documents to display.
- 3) Find the document to be deleted and click on the **Delete** icon assigned to the document. A confirmation window will appear.
- 4) Click **OK**. The selected document will be deleted from the list.



Section 5: Viewing Reports

Category Report

From: 

To: 

Sort by:

Category	View Count
2008 Reports	7
2009 Reports	0
Public	4
Private	1
Private	0

Figure 5-1 Category Report Menu

The reports menu items (**Category Report**, **Document Report**, **User Report**, and **Group Report**) provide you with Document Manager usage information: upload and download counts, page views, and login counts for a specific period. Reports can be generated for categories, documents, user groups, and users.

Viewing Category Reports

The **Category Report Menu** (Figure 5-1) allows you to view access information to all Document Manager categories for a given time period.

- 1) To view the **Category Report**, click **Category Report** in the right-hand **Main Menu**. The report will load in the webpage's right frame.
- 2) Click the **Calendar** icon in the **From** and **To** fields and click on a date to specify the report period. Alternatively, you can enter a date using the **YYYY-MM-DD** format.
- 3) Select a report view from the **Sort By** drop-down menu.

Selecting **Category** will sort the report alphabetically by category name; selecting **Category Descending** will generate the reverse.

Selecting **View Count** will display the report based on document views from lowest to highest, selecting **View Count Descending** will generate the reverse.

Selecting **Upload Count** will list the report based on uploads from lowest to highest, selecting **Upload Count Descending** will generate the reverse.

- 4) Click **Search**. The report will be automatically generated

Viewing Document Reports

The **Document Report Menu** allows you to view access information to all Document Manager documents for a given time period.

- 1) Click **Document Report** in the right-hand **Main Menu**. The report will load automatically.
- 2) Click the **Calendar** icon in the **From** and **To** fields and click on a date to specify the report period. Alternatively, you can enter a date using the **YYYY-MM-DD** format.



- 3) Select a report view from the **YYYY-MM-DD** drop-down menu.

Selecting **Document** will sort the report alphabetically by document name; selecting **Document Descending** will generate the reverse.

Selecting **View Count** will display the report based on document views from lowest to highest, selecting **View Count Descending** will generate the reverse.

Selecting **Download Count** will list the report based on uploads from lowest to highest, selecting **Download Count Descending** will generate the reverse.

- 4) Click **Search**. The report will be automatically generated.



Section 6: Managing Document Manager Lite Pages

The **Document Pages submenu** lists all the Web pages within the **Document Manager *lite***. This menu allows you to configure each page using the WCE tool. You can configure the **Category**, **Detail**, and **Upload** front-end pages.

Configuration Steps

Document Category

English (US)

Title

Keywords

Seo Description

Template

Description

[P:category_links]

[P:category]

[P:document]

[P:logout]

[P:category_links] - Category Breadcrumbs
[P:category] - list of sub-categories of this category
[P:document] - list of document in this category
[P:logout] - logout - only display when user is logged in

Figure 6-1 Category page

To configure a Document Manager page do the following:

- 1) From the right-hand navigation pane, click **Category**, **Detail**, or **Upload**. For example, if you wish to configure text and Search Engine Optimization (SEO) details for the front-end **Category page** then click the **Category** link. The **Document Category** configuration page will be displayed (**Error! Reference source not found.**).
- 2) Enter a page title in the **Title** field. The title appears on a browser title line, usually at the top of the window, and is the part of the page displayed on search engines as a link. It also appears in browser **Forward/Backward** lists, as well as in browser Bookmarks and Favorites.
- 3) Enter keywords for the front-end **Category Page** in the **Keywords** field. Keywords are words used to search for a topic. Use keywords that best describe your website, its contents, and the products and services offered. Separate each keyword using a comma.
- 4) Enter a description for the front-end **Category Page** in the **SEO Description** field. The page description is used by search engines to summarize the contents of a webpage and is displayed with the Page Title and the Web address as part of a search result.
- 5) Select a template from the **Template** drop-down menu.

- 6) Enter text in the **Description** field. Use the WCE tools to customize the front-end **Category Page** formatting and layout. (Refer to the WCE Toolbar Page on page 35 for a description of each WCE button).
- 7) Enter text in the **Description** field. Use the WCE tools to customize the front-end **Document Category Page** formatting and layout. (Please refer to the WCE Toolbar Page on page 35 for a description of each WCE button).
- 8) Use the **[p]** placeholder button to place page specific placeholders. See the table below for which placeholders you can use on each Document page. You can position the above placeholders anywhere within the **WCE**. Ensure that the correct placeholder syntax is followed.
- 9) When you are finished, click the **Update** button.

Menu Item	Front End Page	Placeholder	Details
Category	Category	[P:category]	Displays the list of sub-categories within this category.
		[P:document]	Displays list of documents in this category
		[P:logout]	Displays when a user is logged in. Allows a user to logout.
		[P:category_links]	Displays the category breadcrumb trail.
Detail	Document Detail	[P:detail]	Displays the document detail content.
		[P:logout]	Displays when a user is logged in. Allows a user to logout.
Upload	Document Upload	[P:upload]	Displays the upload feature.
		[P:logout]	Displays when a user is logged in. Allows a user to logout.



Section 7: Document Manager Lite Integration

Document Manager *lite* is fully modular and is easily integrated within your Web project in Opensites.

Integrating the Document Manager Lite Application

- 1) From the **OpenSites Work Area**, drag the **Document Manager *lite*** to the page you would like to host the **Document Manager *lite*** application. The tool icon  will appear within the Page icon.
- 2) Double-click the page icon. The **Page Details View** will be displayed. Click the **Contents** tab.
- 3) Within the WCE window, position your cursor where you would like the **Document Manager *lite*** application to be placed.
- 4) Click the **Insert/Edit Placeholder [p]** icon. The **Placeholder Properties** dialog will be displayed.
- 5) Select **Document Manager *lite*** from the **placeholder Name** dropdown list and click **OK**. The **Document Manager *lite*** placeholder will be displayed in the WCE window. You have now successfully added the **Document Manager *lite*** application to your Web project.



Section 8: Internet Marketing Toolkit Integration

Voloper's Internet Marketing Toolkit (Customer Manager, Campaign Manager, and Dashboard) integrates with the Document Manger Lite module and captures user activity. The following module activities are captured:

View Category: The toolkit captures which categories are viewed and how often.

View Document: The toolkit captures which documents are viewed and how often.

Adding the Internet Marketing Module

If you do not have the Internet Marketing Toolkit installed, you can drag-and-drop the toolkit from the Work Areas Pane to one of your project pages (e.g., your home page). You do not need to place it on your page via the page details contents tab (i.e., using the **[p]** placeholder tool). You can access the Internet Marketing Toolkit from your Admin screen like any other module.



Section 9: Talk to Us

Your feedback is important to us. Whether you'd like to share your opinion about a product, ask a question about one of our services, or comment on our website, we want to hear from you. Please send your feedback and valuable suggestions to us. We look forward to hearing from you.

Section 10: The Web Content Editor Toolbar Page

-  Open File
 -  Save File
 -  Format
 -  Font
 -  Bold
 -  Italic
 -  Underline
 -  Color
 -  Align Left
 -  Align Center
 -  Align Right
 -  Align Center
 -  Number List
 -  Bullet List
 -  Decrease Indent
 -  Increase Indent
 -  Break
 -  Subscript
 -  Superscript
 -  Horizontal Line
 -  Special Character
 -  Cut
 -  Copy
 -  Paste
 -  Paste Text
 -  Paste from Word
 -  Undo
 -  Redo
 -  Find Text
 -  Insert Table
 -  Show Invisible Borders
 -  Insert Row
 -  Delete Row
 -  Insert Column
 -  Delete Column
 -  Insert Cell
 -  Delete Cell
 -  Merge Cell
 -  Split Cell
 -  Style Sheet Manager
 -  Apply Style
- Zoom 100%

 - 50%
 - 75%
 - 100%
 - 125%
 - 150%
 - 175%
 - 200%
-  Link
 -  Unlink
 -  Select All
 -  Remove Format
 -  Show Details
 -  Insert File
 -  Insert Image
 -  Insert Rollover
 -  Insert Thumbnail
 -  Insert Script
 -  Insert HTML Tag



Index

Categories.....	10	Documents	14
Category Reports	18	Internet Marketing.....	23
Customizing Pages	20	Managing Document Manager Pro Pages	20
Deleting a Document	17	Reports	18
Document Categories.....	10	Settings	9
Document Reports.....	18	Subcategories	13