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	Owner / Approver:		David Best DIRECTOR Bill Best DIRECTOR	

Proquis Document Viewer for Sharepoint

An overview of the new webpart for Microsoft Sharepoint

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Introduction

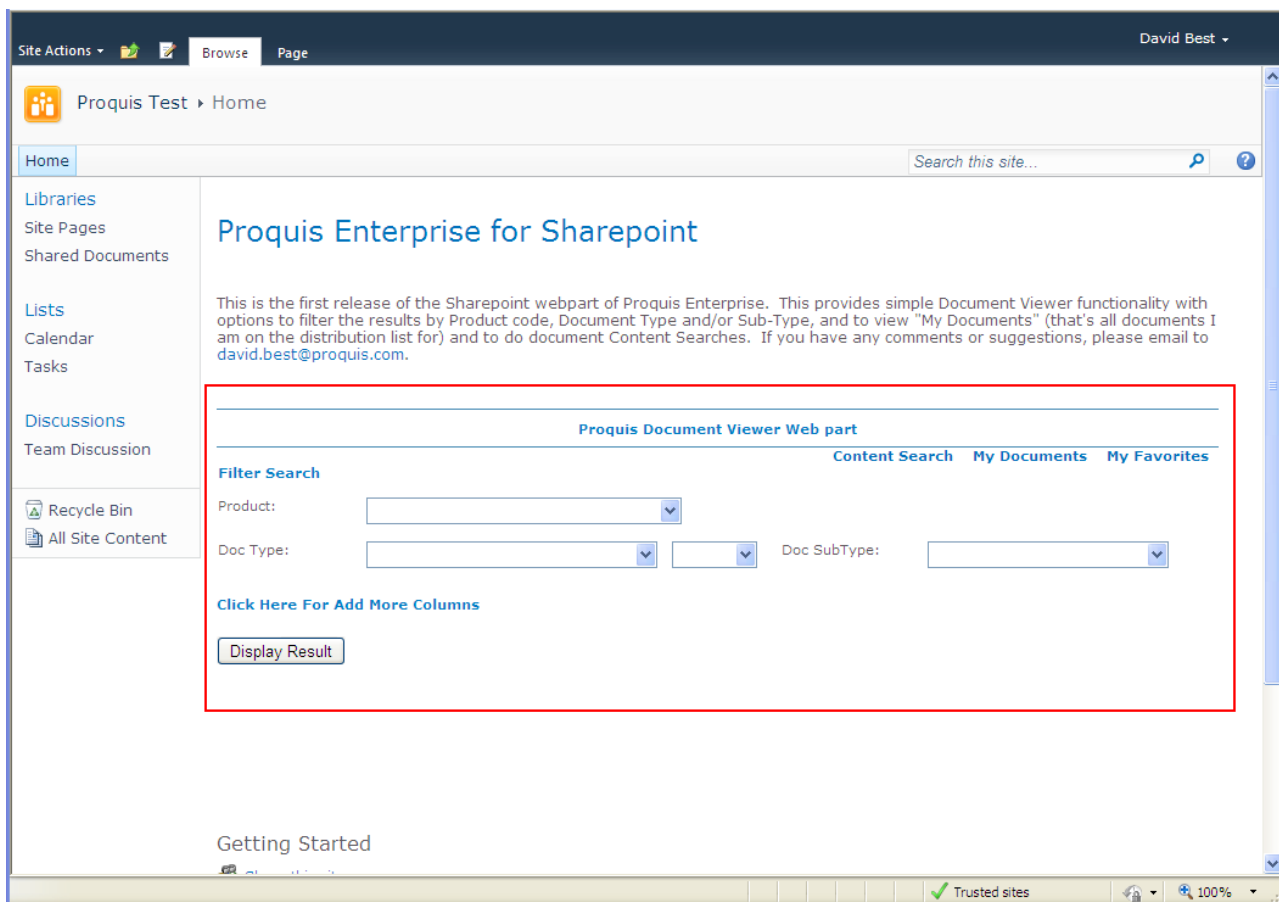
Historically, Proquis has always provided a simple Document Viewer function that was part of the main Proquis system and operated from the same environment. This meant using Internet Explorer to access the specific Proquis Document Viewer screens that followed the interface style of Proquis Enterprise.

The Proquis Document Viewer for Sharepoint is a convenient and instant way to incorporate the powerful document viewing functions of Proquis into your own intranet site built on Sharepoint. The data and documents accessed via the Viewer for Sharepoint remain in the management and control of Proquis Enterprise, but the users can access, search and view the documents from *your* Sharepoint-designed environment.


This new facility gives you the best of both worlds...

- Proquis Enterprise document control and security
- Sharepoint-integrated user interface

Once installed, the Proquis Document Viewer can be placed onto your own designed webpage, such as in the example below...



The screenshot shows a SharePoint site titled "Proquis Test" with a user named "David Best". The main content area displays the "Proquis Enterprise for Sharepoint" web part. This web part features a "Filter Search" section with three dropdown menus: "Product", "Doc Type", and "Doc SubType". There are also links for "Content Search", "My Documents", and "My Favorites". A "Display Result" button is located below the filters. The page also includes a "Getting Started" section at the bottom.

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Using the Proquis Document Viewer for Sharepoint

Using a Filter Search

The Document Viewer provides document filter search options for ...

- **Product** – select the product from the drop-down list and click Display Results to show all documents that have been associated with that Product.
- **Document Type** – select the document Type from the drop-down list and click Display Results to show all documents that have been associated with that document Type.
- **Document Sub-Type** – select the document Sub-Type from the drop-down list and click Display Results to show all documents that have been associated with that document Sub-Type.

If you select a document Type, you can then sub-filter the results by selecting **AND** or **OR**, and then selecting a document Sub-Type. Proquis will filter the results based on your particular selections when you click Display Results.

Proquis Document Viewer Web part

Content Search My Documents My Favorites

Filter Search


Product:

Doc Type: IMPLEMENTATION AND PROQUIS enterprise Doc SubType:

[Click Here For Add More Columns](#)

Display Filtered Results

Document Number	Document Title	Owner	Release date	Revision #	Type	Sub-Type	Editor	Status
PRQE CONFIGURATION	PROQUIS Enterprise - Preparing for Configuration	DAVIDB	03/31/2010	4	IMPLEMENTATION	PROQUIS enterprise	WORD	DOCUMENT ISSUED
PRQE DATA MIGRATION	PROQUIS enterprise Data Migration	DAVIDB	02/20/2003	1	IMPLEMENTATION	PROQUIS enterprise	WORD	DOCUMENT ISSUED
PRQE SPECIALS PERSONNEL	Special Configuration in Personnel : Staff Work Permits	PAULL	09/08/2009		IMPLEMENTATION	PROQUIS enterprise	WORD	DOCUMENT ISSUED
PRQE-31-AQ-ATBT-LOGIC	Proquis Enterprise v3.1 Auditor Qualification Audit Types BaseTable Logic	GRAHAMM	09/26/2008	1	IMPLEMENTATION	PROQUIS enterprise	ALLCLEAR	DOCUMENT ISSUED
PRQE-31-AQ-CBT-LOGIC	Proquis Enterprise v3.1 Auditor Qualification Certificate Types BaseTable Logic	GRAHAMM	09/26/2008	1	IMPLEMENTATION	PROQUIS enterprise	ALLCLEAR	DOCUMENT ISSUED

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Selecting Columns to Show

By default, the search results show just a few key columns of data in the results. However, you can add further columns to the table as follows...

Click on the link **“Click Here for Add More Columns”**. This displays a list of data fields from the Document table and you can select additional columns to be shown.

When you refresh the search results by clicking Display Results, the new columns will be shown in the results table.

Click on the link **“Click Here for Add More Columns”** to hide the list of available data fields.

Proquis Document Viewer Web part

[Content Search](#) [My Documents](#) [My Favorites](#)

Filter Search

Product:

Doc Type: AND Doc SubType:

Click Here For Add More Columns


<input type="checkbox"/> Check Out Date	<input type="checkbox"/> Live Editor	<input type="checkbox"/> Access restricted to distribution list
<input type="checkbox"/> Check Out By Personnel Number	<input checked="" type="checkbox"/> Release date	<input type="checkbox"/> Review Date
<input type="checkbox"/> Created Date	<input checked="" type="checkbox"/> Revision #	<input type="checkbox"/> Current RFA #
<input checked="" type="checkbox"/> Document Number	<input checked="" type="checkbox"/> Document Title	<input type="checkbox"/> Risk Criticality
<input checked="" type="checkbox"/> Sub-Type	<input type="checkbox"/> View as PDF files	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Type	<input type="checkbox"/> Master Location	<input type="checkbox"/> Date To Revert
<input checked="" type="checkbox"/> Editor	<input type="checkbox"/> Notes	<input type="checkbox"/> Draft Title
<input type="checkbox"/> Draft Revision #	<input checked="" type="checkbox"/> Owner	<input type="checkbox"/> Withdrawn
<input type="checkbox"/> Last Updated	<input type="checkbox"/> Approver	

Display Filtered Results

Document Number	Document Title	Owner	Release date	Revision #	Type	Sub-Type	Editor	Status

Sorting the Results

By default, the results table sorts the documents by Document Number. However, you can re-sort the results by clicking on any other column. Proquis will then re-display the results in the order of the column clicked. Clicking a column more than once will toggle the sort Descending / Ascending.

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Displaying Favorites

In the main Proquis system, you can add selected documents into your own Favorites list. To display your Favorites, click on **My Favorites** link at the upper left of the Document Viewer.

Proquis Document Viewer Web part

Content Search [My Documents](#) **My Favorites**

Filter Search

Product:

Doc Type: Doc SubType:

[Click Here For Add More Columns](#)

Display My Favorites

Document Number	Document Title	Owner	Release date	Revision #	Type	Sub-Type	Editor	Status
ACL010	Overview of allCLEAR	ROBH	06/10/2008	4	TRAINING	Web	WORD	DOCUMENT ISSUED
ACL020	allCLEAR Formatting, Layout and Distribuion.	BILLB	06/16/2008	3	TRAINING		WORD	DOCUMENT ISSUED

Displaying Your Own Documents

In the main Proquis system, each document has a distribution list. This includes specifically named individuals, document Groups and Departments. If you are named on a distribution list, either specifically, as a member of a Group, or because you are in a particular Department that is on the distribution list, the document is considered to be one of *your* documents. To display your documents, click on **My Documents** link at the upper left of the Document Viewer. The system will then display a list of all the documents that you are associated to via the distribution lists.

Proquis Document Viewer Web part

Content Search **My Documents** [My Favorites](#)

Filter Search


Product:

Doc Type: Doc SubType:

[Click Here For Add More Columns](#)

Display My Documents

Document Number	Document Title	Owner	Release date	Revision #	Type	Su
21CFR11	21CFR11 Requirement & Interpretation	DAVIDB	04/14/2005	1	SPECS	

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Searching by Document Content

If you want to search for a specific set of documents, the Document Viewer provides a Content Search. This allows you to search the actual text content of all the documents in the Proquis Document Control for a specific word or phrase. It does not rely on you knowing a particular document Type or other detail. You can simply hunt the documents for anything that contains a defined Word or phrase.

To initiate this search, click **Content Search** at the upper right of the Viewer. The Filter Search area is then replaced by the Content Search field with options to search either the Live or Draft documents, plus a short explanatory note at the right-hand side.

1. Enter the **Search String** in the field provided,
2. Pick either **Live** or **Draft** option,
3. Click **Display Result**.

The results table will be sorted by the **Rank** of the results. This is an indication of the level of match of each document to the search string defined. The more "hits" on the search string in a particular document, the higher the Rank of that document.

Proquis Document Viewer Web part

[Filter Search](#) [My Documents](#) [My Favorites](#)

Content Search

Search String: This process uses the indexing capabilities of the SQL database. You can use a single word, or a phrase with quote marks around it. You can also use AND/OR/NOT operators between words and phrases. For example, "Quality Policy" OR "Quality Process". or perhaps "Quality Policy" AND NOT "Environmental Policy".

Search In Documents: Live Draft


[Click Here For Add More Columns](#)

Content Search Results

Document Number	Document Title	Owner	Release date	RANK	Revision #	Type	Sub-Type	Editor	Status
PRQEDC02	A Guide to Proquis Enterprise - Document Control	ROBH	06/19/2007	173	2	TRAINING		WORD	DOCUMENT ISSUED
PRQE USER MANUAL	Proquis Enterprise User Guide / Manual	BILLB	06/01/2010	156	3.10.05	MARKETING	Literature	ADOBE	DOCUMENT ISSUED

Viewing a Document

When you have displayed the list of documents, to view a particular document in the list, click on the Document Title shown in the second column of the results table. This will open a pop-up browser and make the call to

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Proquis Enterprise to show the document. Only approved Live versions of the documents will be shown in the Document Viewer.

Note that all the security options defined in Proquis are applicable here in the Sharepoint environment. So, for example...

- Withdrawn documents will not be shown.
- Document set with the control "Access Restricted to the Distribution List" won't be shown unless you are on the distribution list.
- Unpublished documents won't be shown.