
Aviator[®] User Guide

Aviator Release 2.3

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INTRODUCTION TO LOTUS NOTES & AVIATOR

Welcome to Aviator Software

Aviator is an advanced file management software application for Lotus Notes and the Internet. Aviator provides a new way of thinking and working – with the ultimate objective to improve your company's operations and increase its success. Aviator is a place to share knowledge with colleagues, partners, and customers. Aviator provides an easy to use interface suited to a variety of information formats:

- Controlled procedures and policies
- Proposals
- Engineering drawings and specifications
- Client communications
- General reference documents
- Reports and results
- Sales collateral
- Confidential information

We are confident you will appreciate Aviator's power, flexibility and ease of use for years to come. It is our mission to ensure your complete satisfaction with Aviator, and as part of that commitment, we have created this training manual to facilitate the learning of Aviator.

The information in this introduction provides an overview of Aviator's structure, backbone, and setup. See the Aviator Administrator Guide for greater detail on these subjects. The body of this manual is to simplify Aviator into every-day use. So take your time to understand all of Aviator's features and benefits.

Lotus Notes & Aviator

Lotus Notes/Domino is the platform for your company's network, providing a forum for electronic communication (email), information sharing, and collaboration. This environment provides the foundation for Aviator and the management of your organization's files. Aviator is an application that runs within Lotus Notes to control the access, review cycles, revisions, storage, and distribution of files.

Aviator documents consist of file attachments, rich text and attributes. Aviator supports all file formats and applications, providing control of the file in its native format - document creation and editing are performed in the file's original application.

Aviator allows users of the system (editors, approvers, and readers) direct access to the documents they need to perform the same processes previously accomplished by manually routing and managing paper.

Aviator can be accessed from a Lotus Notes client or a Web browser. Some functionality varies between the two interfaces - this manual highlights certain actions that can only be performed with Lotus Notes or a Web browser.

Advanced File Management

Aviator is structured similar to a paper storage system: a library contains cabinets, which contain documents (the files are contained in the Aviator documents). The Aviator library is scalable to the entire enterprise. Aviator cabinets can accommodate small workgroups, projects, departments, or the entire organization. Each cabinet can store thousands of documents.

Aviator is set up using profiles:

- The Library profile contains basic administrative and security information. Individuals in the “Library Users” group are the only users allowed into Aviator.
- Cabinet profiles contain security information about each cabinet. Only users specified in the “Cabinet Users” groups have access to those cabinets. Depending on the settings, if you are not listed as a user of a cabinet, you will not see the cabinet or its profile in the library. The cabinet profile also determines the types of documents to be managed within.
- Document profiles dictate the characteristics of documents. Aviator offers the creation of unlimited document profiles for the many types of documents your organization manages. The document profile determines:
 - certain default attribute settings such as editors, readers, and distribution lists
 - how the documents will be classified in the cabinet
 - whether revision control will be flexible or rigid
 - whether document readers will be tracked
- Review profiles organize review and approval workflow for documents. Use predetermined review profiles for specific types of documents, or use more open profiles as necessary. The review profile allows you to assign reviewers, determine their allotted time, select their review action, and determine escalation as reminders.

Aviator’s structure and setup allows for administration and security to be set at all levels. At the document level, if you are the reader of a document you have limited access to its content other than reading and commenting. As a document editor, you have the ability to edit documents and their content. As a document manager, you have complete control over the document. If you are not listed in a document’s attributes as manager, editor or reader, you do not even see the document in any cabinet view.

Administration

Aviator contains many features designed to make its administration extremely easy. Scheduled agents run hourly and daily to ensure Aviator’s data integrity and health. These agents are covered in greater detail in the Aviator Administrator Guide.

At all times if you need additional information on a topic, refer to Aviator’s on-line [Help](#). It is designed to answer questions regarding Aviator’s use and functionality.

AVIATOR ELEMENTS & NAVIGATION

Accessing Aviator

You have a few of options to access Aviator:

- Automated - Library administrators will email users a link to the Aviator library or a specific cabinet (Lotus Notes or Web browser users),

Or

- Manual (Lotus Notes users) – From your Lotus Notes workspace:
 - Select File – Database – Open
 - At the server field, select “Your Server Name” from the drop-down list
 - Select the path to the Aviator library or cabinet databases and click open
- Manual (Web browser users) – Library administrators will provide an address to the Aviator Library and Cabinets. Enter the address in your browser location field and <Enter>.

Each time you open a database an icon for that database is automatically added to your Lotus Notes workspace. The next time you go to your workspace, you can click on the icons to access the desired cabinets directly.

Aviator Library

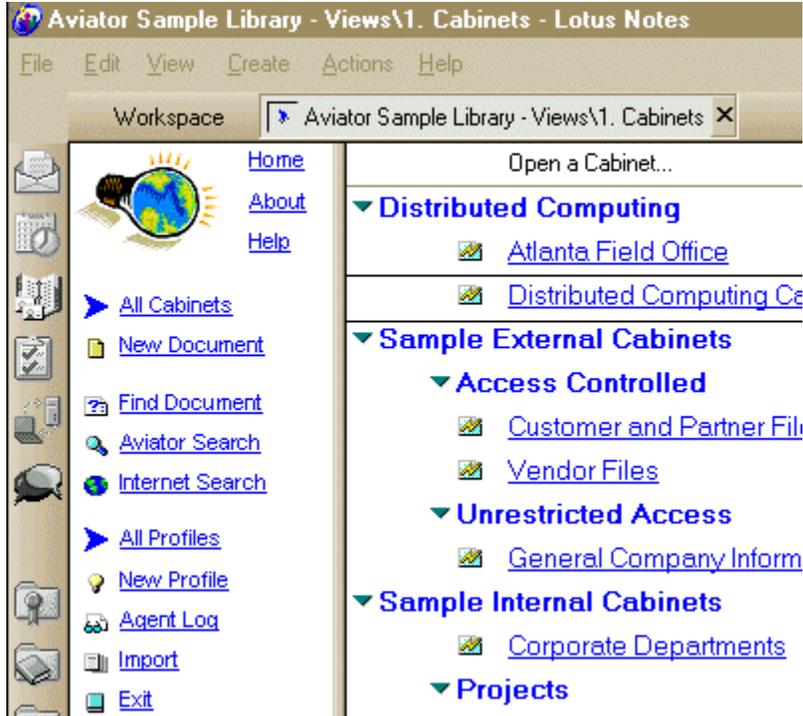
The library is the initial entry point to Aviator, and the location of all cabinets (see library screen on next page). Your library can house hundreds and potentially thousands of cabinets. When entering the library, note the navigator on the left, and library view on the right. There are three actions at the top of the navigator:

- Access your organization’s Web site [Home](#) page (with Internet access) or an internal Intranet
- An [About](#) document to provide guidance on use of the library, administrator contact information, and other information relevant to Aviator’s role in your company
- Access to Aviator’s on-line [Help](#) which provides descriptive content about Aviator’s use

From the Library, you can:

- Access cabinets
- Create a new document
- Find a document
- Store and retrieve searches
- View all profiles
- Create a new profile (with sufficient access)
- Import files and documents (Lotus Notes users only)

- View the agent log (primarily for library and Notes administrators)



Aviator Library - All Cabinets View

Aviator Cabinets

Aviator's cabinets are the storage locations for documents (see cabinet screen on next page). From the library navigator, click on the [All Cabinets](#) link to see the cabinets in the Aviator library. For heavily populated libraries, cabinets can be categorized for ease of browsing. Double-click on the desired cabinet name to open the cabinet.

Note: Depending on cabinet profile settings, if you are not designated as user of a cabinet, you will not see the cabinet listed. If you would like access to a specific cabinet, contact the library administrator.

Once inside a cabinet, note the navigator on the left and cabinet view on the right. For Lotus Notes users, the "Switch Navigator" button above the navigator changes the navigator from Aviator's to the more familiar Notes format. Also use "Switch Navigator" to access your personal folders. At the top of the navigator you have three actions similar to the library:

- Access your organization's Web site [Home](#) page (with Internet access), or an internal Intranet
- An [About](#) document to provide guidance on use of the cabinet. The About document can contain valuable information on guidelines for creating documents, cabinet administrators, etc.
- Access to Aviator's on-line [Help](#) which provides descriptive content about Aviator's use

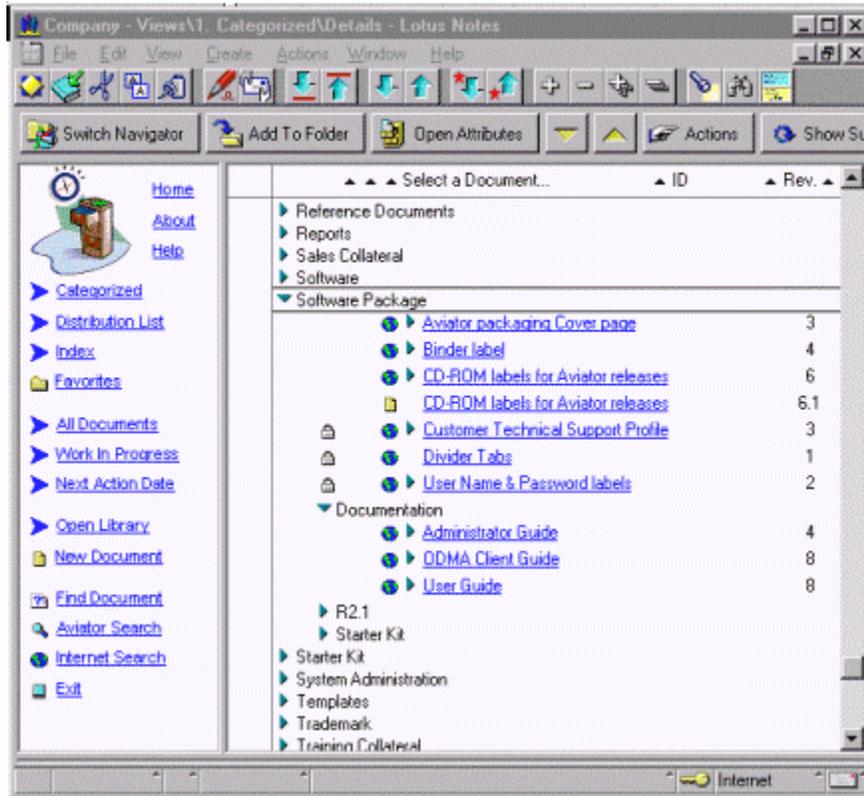
From the cabinet, you can:

- View documents in a categorization list – this view has an option to display summary information about each document (click on the "Show Summary" button at the top of the view) or to display detailed information about each document (click on the "Show Details" button at the top of the view).
- View documents by distribution or index list, which provide another type of classification

- View all documents in the cabinets, regardless of status
- View only documents in currently being worked on or in review
- View documents that are pending an action, sort by the next action date
- Open the library
- Create a new document
- Find a document
- Retrieve saved search results

The buttons at the top of the views (for Notes clients only) let you:

- Switch the navigator to the standard Notes Folders navigator (Switch Navigator)
- Add selected documents to a personal folder (Add To Folder)
- Open the attributes of a selected document from the view (Open Attributes)
- Download and Upload files between selected documents and your local directory system (yellow arrows)
- Perform specific management actions on selected documents (Actions)



Aviator Cabinet – Categorized View

Aviator Documents

Aviator documents consist of two parts: “attributes” and “content”. Attributes describe the document (e.g., document name, document ID, date created, author, who can edit or read the document, etc.). The content is the body of the document, which consists of file attachments (word processing files, spreadsheets, graphics, CAD drawings, etc.), text, or any combination of the two.

Document Status

The status of an Aviator document depends on the release process and revision control imparted on it from its profile:

-  Released: the document is completed and issued for all relevant readers to access. Released revisions are whole numbers or letters (i.e. 1, 2, 3 or A, B, C etc.);
-  Draft: the document is in progress, on its way to being released. Draft revisions are ‘point revisions’ (i.e. 0.1, 1.3, 3.4, B.2, D.4 etc.);
-  Checked out: the document (draft or released) is being edited by a user (check the document’s attributes to see who has it checked out);
-  Review in progress: the draft document is being reviewed by certain users (see the document’s attributes for the stage of the review process);
-  Deleted: the document is no longer used and remains in the cabinet for reference purposes.

A document with a twisty  next to it indicates there are previous revisions or comments have been made to the document. These revisions, comments, and responses to comments are part of the document’s life cycle. They provide a snapshot of the document’s history, and provide a means of collaborating or sharing information about the document.

Opening a Document

A document’s content can be opened directly from the cabinet view by double clicking on the document. A document’s attributes can be accessed from its content view.

Lotus Notes users can open the attributes from the cabinet view by clicking the “Open Attributes” button above the document list (the document must be highlighted in the view).

Aviator ODMA users can launch files contained in a document directly into an ODMA-compliant application (see Aviator ODMA Guide).

Creating a New Document

- 1) Click New Document in the library or cabinet
- 2) Select a document profile
- 3) Click Create Document
- 4) Enter the document attributes. The document’s attributes can be edited by the document manager at a later date (see Aviator’s on-line Help for additional details about attributes):
 - a) Name
 - b) Summary

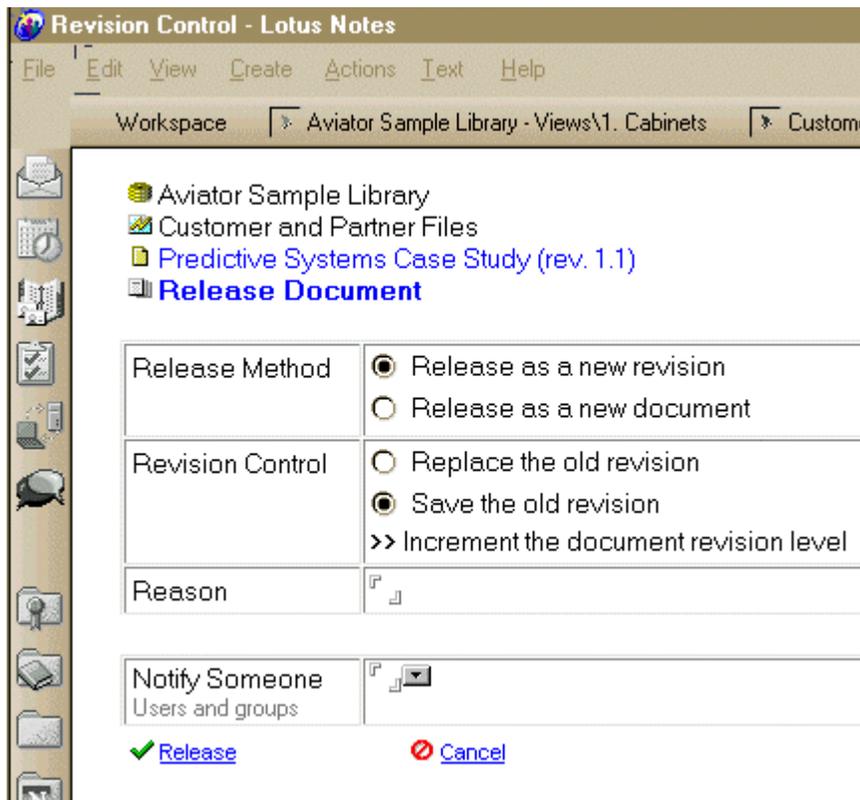
- 5) Optionally expand the Document Attributes section
 - a) Enter Document ID (if applicable)
 - b) Keep the default Date Created, or use the original document creation date (per your documentation requirements)
 - c) Modify Author if applicable
 - d) Add or remove Editors, Readers and Distribution List as necessary
 - e) If appropriate, select a Category or Index keyword to classify documents
 - f) Aviator provides additional Custom Attributes defined in the respective document profile. Add attributes as required.
- 6) Click Create Content
- 7) Lotus Notes users have the ability to add text or embed files in the specified field
- 8) All users (Notes or Web) select Attach File or Browse to attach a file (Aviator supports all file formats)
- 9) Click Save and Close.

At this point you will have the option to check in the document. Checking in the document means changing the document's status from "checked out", or "newly created" to either a draft or released document (depending on the release process of the document's profile). If you choose not to check in the document it stays checked out to you, signaling other readers that the document is in progress.

NOTE: All documents are created as checked out, and need to be checked in upon Save and Close before they can be read or edited by other users.

Releasing a Document

A document's release process is controlled by its profile. Documents can be created as released or as drafts. Draft documents can be released with no control, or can be forced to require a review by certain individuals prior to its release. A draft document can go through many revisions prior to being released. Upon release you will also have the option to save the draft revisions.

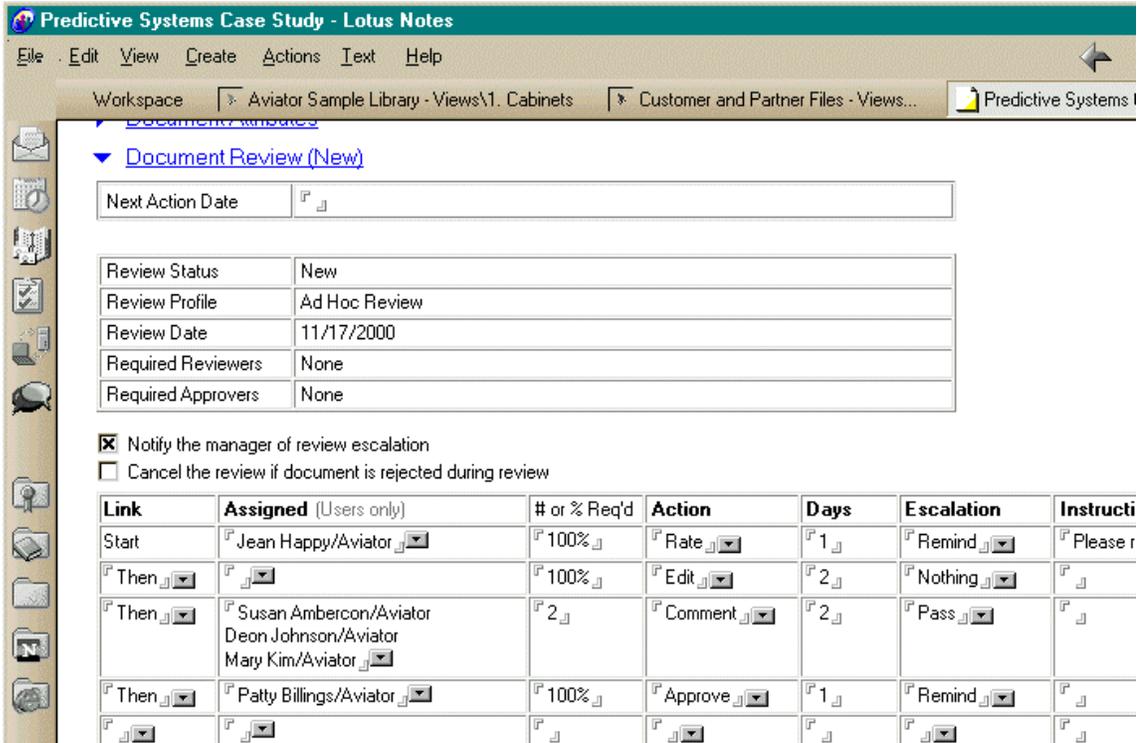


Document Release Dialog

Creating a Review

- 1) From the document's attributes, click Create Review
- 2) Select the appropriate review profile
- 3) Click Create Review
- 4) At the document attributes screen, expand the Document Review section
- 5) If the review *is not* editable:
 - a) enter any instructions for reviewers
 - b) go to step 8
- 6) If the review *is* editable, verify the contents of the review:
 - a) add or remove reviewers if necessary
 - i) For parallel reviews, enter multiple reviewers.
 - b) select an action to be taken by assigned reviewers:
 - i) Edit – reviewers have the ability to check out and edit documents. They must check the document back in before assigning the next reviewer.
 - ii) Comment – reviewers add comments to the document

- iii) Approve – reviewers approve or reject the document. You have the option to cancel the review if the document is rejected during the review (the review is canceled and returned to the document manager for edit) – check box above review table.
 - iv) Rate – reviewers rate the document on a scale (1 - 3 through 1 – 8) controlled by the review profile. An average rating from all reviewers is calculated in the results.
- c) Enter the number of reviewers that must complete the action, as a percentage or number. Default is 100% if not specified
- d) enter the duration (in days) for each reviewer



Document Review Settings

- e) specify an escalation (action taken once their duration is expired) for reviewers:
 - i) Nothing – the document stays with the reviewer until reviewed (no reminder is sent)
 - ii) Remind – the reviewer is reminded via email that they are late (they are reminded every day from then on)
 - iii) Pass – the document is passed to the next assigned reviewer
 - f) to be alerted of review escalations, select the box above the review table
 - g) enter any special instructions for reviewers
 - h) NOTE: if you want an assigned reviewer to choose the next reviewer, or any of the items for the next reviewer, select 'Then' in the first column, and leave other fields in that row empty.
- 7) If you are not ready to submit document for review, click Save and Close

- 8) When ready to start the review, click Start Review. This automatically saves and closes the document.
- 9) If periodic reviews are required for the document, enter a date for the next action date at the top of the review section. The document manager will be notified on the specified date via email.

Viewing a Document's Content (Attached File(s))

The document's content can consist of text or file attachments. Text can be read directly from the document content view. To read a file attachment:

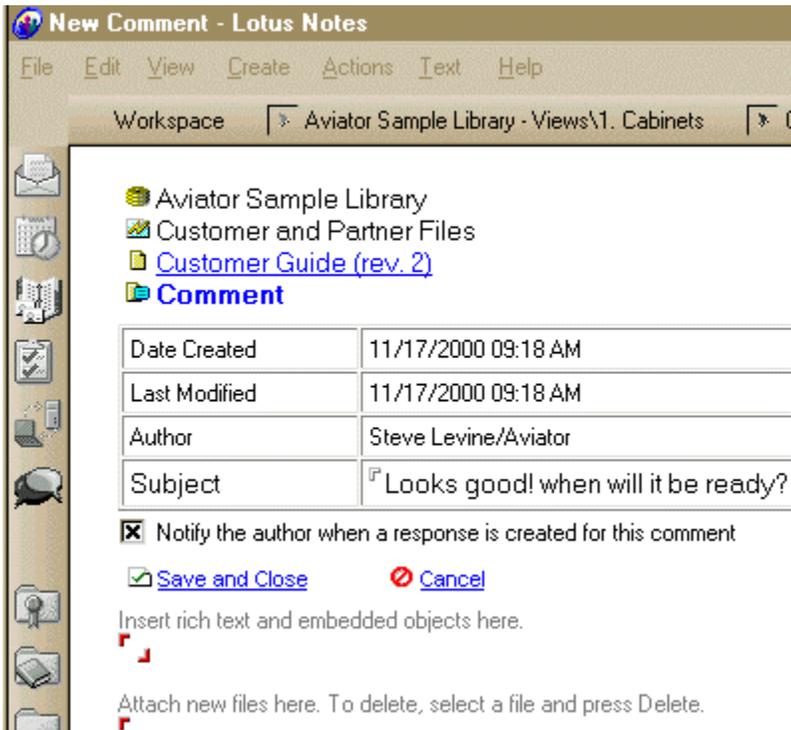
- 1) Select the application icon and right click
 - a) to view the file with the Lotus Notes viewer, select View. The document may appear skewed due to the viewer's inability to maintain certain applications' formatting.
 - b) to launch the file in its native application format, select Launch. The file will be copied to your local temporary directory (c:\Temp or c:\Windows\Temp). Edits to this file DO NOT affect the file attached to the Aviator document.
 - c) for ODMA-compliant applications, files can be opened from and saved into Aviator directly from the application. See the Aviator ODMA Guide.
- 2) The document can be printed from any of the above options (provided access to a printer and ability to print certain organization's documents).

Adding a Comment to a Document

Comments can be made about a document and attached to the document (threaded under the document's name in cabinet views) for others to read. Comments can be used:

- by readers to alert editors of changes necessary to the document;
 - by editors to contribute to the document without having to check it out at that time;
 - by anyone wishing to contribute their thoughts about a document.
- 1) Click on the Comment action in the document's attributes or content view
 - 2) Enter the comment in the fields provided
 - 3) Text or file attachments can be added to the comment fields
 - 4) Click Save and Close
 - 5) Only the document manager and administrator have permission to delete comments.

To respond to a comment, double-click on the comment from the cabinet view and select the Response action. The response is threaded under the initial comment in the cabinet view. You can respond to responses in the same way as a comment.



Aviator Comment

Revising a Document

Documents can be revised one of two ways: by checking it out and checking it back in, or making a copy and re-releasing the document as a new revision. While checking a document out, editing it, and checking it back in may be the easiest process, some document profiles will not allow the ability to check out released documents. These documents must be copied, edited, and re-released to replace the original document.

Checking Out a Document

Lotus Notes users have 3 options to check out and edit a document – Web browser users can only use the first:

- 1) Open the document's content or attribute page and click the Check Out action: the content page is opened in edit mode, so that file attachments can be detached or launched, edited and reattached.
- 2) Highlight one or more documents in a cabinet view and click the Download Files button (yellow down arrow), select the Check Out option and click OK.
- 3) Aviator ODMA users can double click on a document select the Check Out option and launch the selected file directly into the appropriate application.

Checking a document out reserves a copy of the document for you and only you. Other readers will see the checked out icon next to the document, but will only be able to view the original (pre-checked out) version.

After modifying a file:

- 1) Edit the document's content page, reattach the modified file – the original file must be deleted first in order to maintain the filename, click the Save and Close action and optionally choose to Check In the document.

- 2) Highlight one or more documents in a cabinet view and click the Upload Files button (yellow up arrow), optionally select the Check In option.
- 3) Aviator ODMA users can save the modified file back to the document from within the application and are prompted to Check In the document when the application is closed.

When you are checking in a document, select from the following options:

- 1) Replace the old revision, with the option to increment the revision number
- 2) Save the old revision, automatically incrementing the revision number
- 3) the document profile may be set to force one of the above
- 4) Optionally enter the reason for the new revision
- 5) Optionally choose to Notify Someone that the document has been modified
- 6) Click the Check In action

Copying a Released Document

Making a copy of a document from an existing released document creates an exact copy as a draft to be modified as necessary to create the new document.

- 1) Access the document's attributes
- 2) Click Copy to create a copy of the document to be modified. If the copy is to become a new document, create a new title for the document at this time.
- 3) Click Edit Content
- 4) Make the necessary changes to the document
- 5) When the document updates are complete, the document must be released according to its document profile
- 6) You will have the option to release the document as a new revision (replacing the original document copied) or as an entirely new document.

Reviewing a Document

If you are assigned to review a document, you will receive an email notification. The email will provide information required to perform the review. You can open the document directly from the email link, or by double clicking on the document in the cabinet listing. This document will appear in the Work In Progress view.

- 1) Open the document's attributes. Note the "Last Update" field in the attributes table - this is the change submitted by the editor for the revision you are reviewing.
- 2) Expand the Document Review (Open) section. You should see your name in the table under "Current Assigned".
- 3) Review the document as required by your assignment
- 4) Once your review is complete, click on the "Review Action" link in the Document Review section.

- 5) Once you submit your review, you will have the option to forward the document to the next assigned reviewer, or keep the review open to you for further review.
- 6) When ready, forward the document to the next reviewer.
- 7) If you are given the ability to choose the next reviewer or any of the review criteria, a window will prompt you to complete the next assigned reviewer's activities.

Deleting a Document

Document managers have the ability to delete documents. Documents can be marked deleted (they stay in the cabinet views, but are considered inactive), or completely removed from the cabinet. To delete a document:

- 1) Open the document attributes
- 2) Click the Delete action
 - a) select "Change status to deleted", and enter the reason for deletion

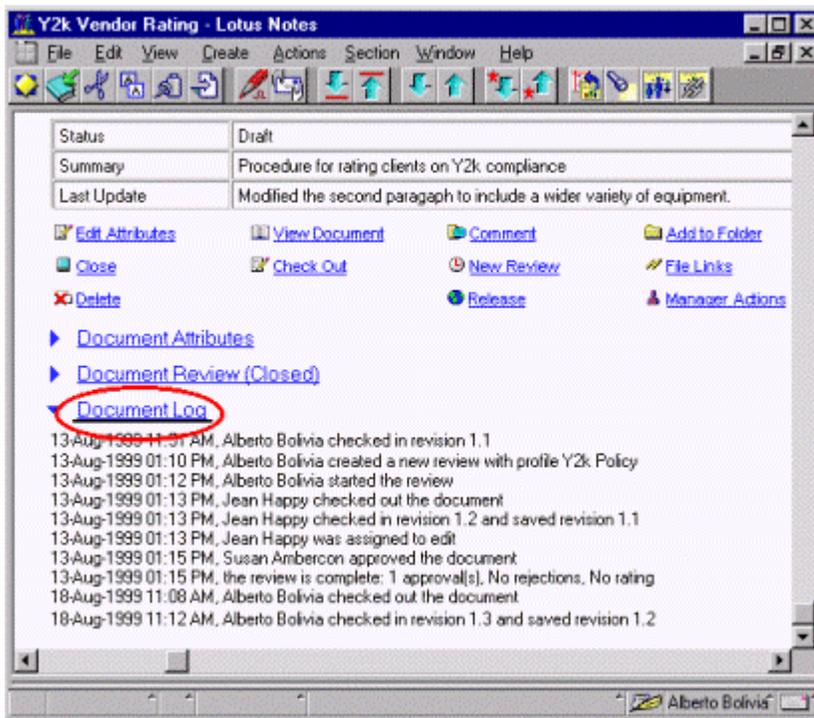
OR

- b) select "Remove document from the cabinet"
- 3) If status changed to deleted, the document will be removed from the views that contain released documents, but can be viewed in the All Documents view.

To re-activate a document marked deleted, select the Undelete action from the document attributes (must have sufficient access).

Document Log

Within the document attributes is a Document Log link. This is a log of all transactions that have occurred within the document. This can help track when the document was accessed, deleted, approved, etc. Depending on the document's profile, the document log can get quite long, or only contain the most recent transactions.



Aviator Document Log

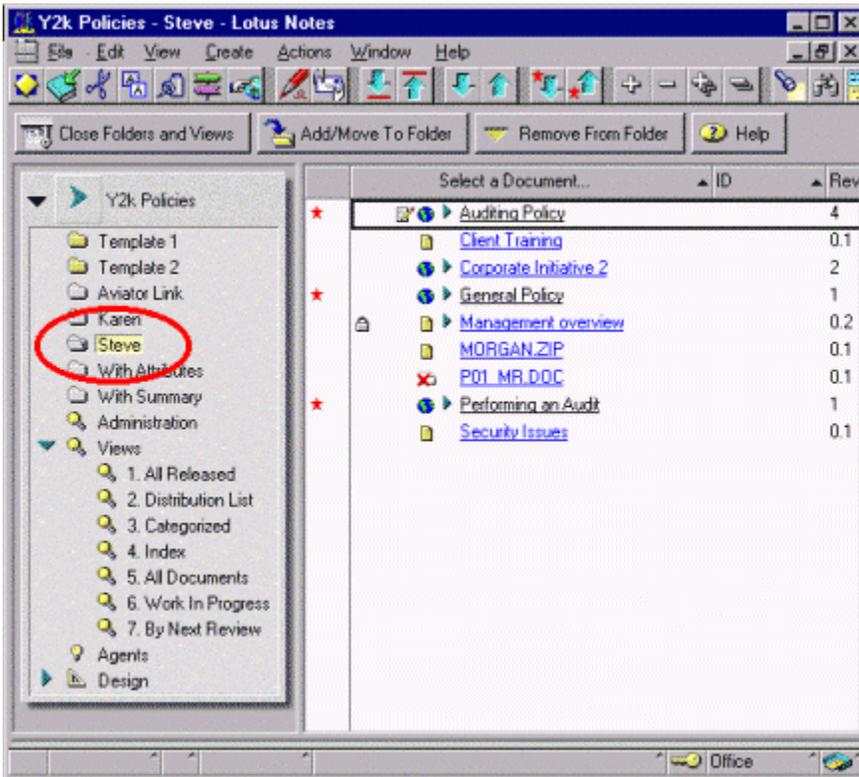
Folders (Lotus Notes users only)

A default Favorites folder is available in the cabinet navigator. You can drag-and-drop documents into this folder from any view. The folder is private, so no one else can see the folder's contents.

Additional folders can be created in the Notes cabinet navigator (click the "Switch Navigator" button above the navigator). These folders can be used to store documents relevant only to you. To add documents to your folder:

- Drag documents to your folder when using the Notes cabinet navigator
- Select documents in the cabinet view, and click the "Add to Folder" button at the top of the view
- In the document's attributes, select the Add to Folder action

This does not remove the documents from the other standard views. Unread marks in your folder indicate a document has been modified since you last accessed it.



Aviator Folders View

Other Document Actions

See Aviator's on-line [Help](#) for more detail on the following activities.

Manager Actions

Document managers will see a Manager Actions action in their documents' attributes. From this action, document managers can:

- Change the document manager from him or herself to another Aviator user
- Change the document's profile
- Copy the document to a different cabinet
- Cancel a check out (if a document is checked out, but the document manager wishes to cancel it)
- Cancel a document's review
- Change a document's review profile
- Open a reader log (logs who has read the document, how many times, and the date of last reading)

Reader log

A reader log optionally activated in the document profile tracks which users have read specific documents, how many times, and the last date the document was read. Only document managers can

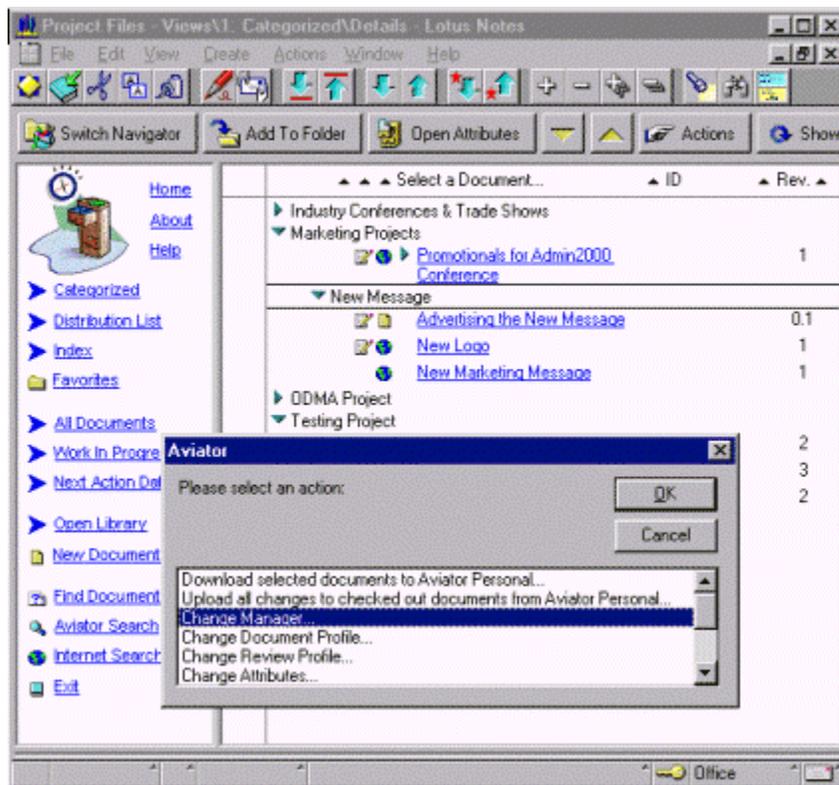
view the log. The reader log is a valuable tool to ensure individuals are reading important documents relevant to the organization's success, as well as to report documents' activity and usage.

File Links

File links allow document creators to link a new document's file to other files within Aviator. If a document is created with a file attachment that references another file in another Aviator document, the file links provide the means to link the two files together.

Global Actions (Lotus Notes users only)

The "View Actions" button at the top of the cabinet view performs global actions to all selected documents:



Aviator Global Actions

- Change Manager
- Change Document Profile
- Change Review Profile
- Change Attributes
- Delete Documents
- Open a Printed Header (for attachment to printed documents)
- Copy the Documents
- Export Documents (exports all attached files to a specified directory)

To initiate a global change:

- 1) Select the documents to be changed
- 2) Click the "View Actions" button
- 3) A pop-up window will prompt you for information
- 4) Enter necessary information, and click "OK"
- 5) An agent will run and immediately post results to you.

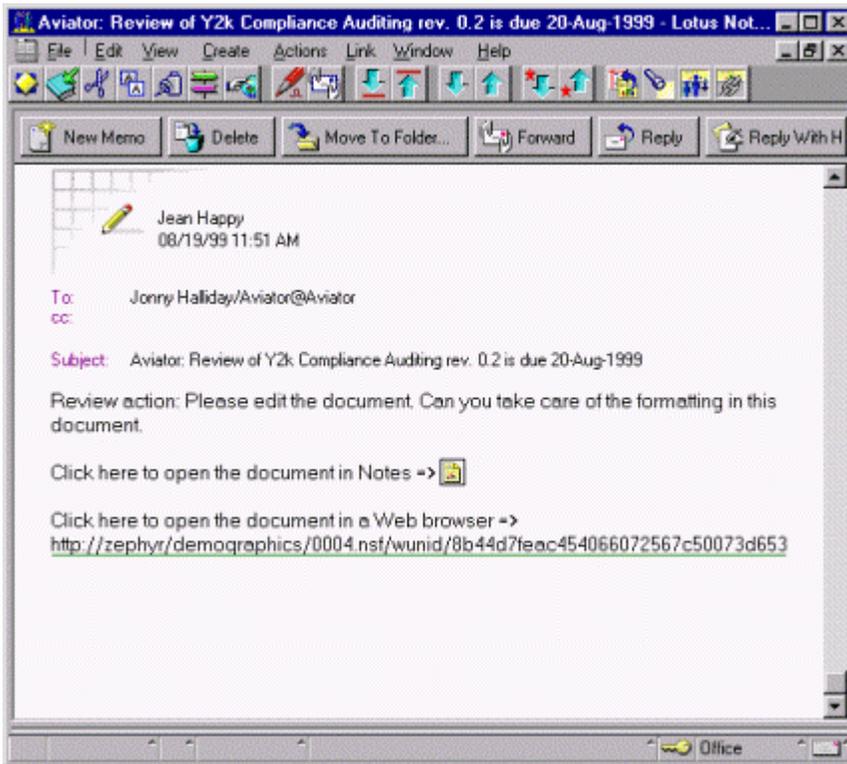
Distribution List Recipients

Aviator optionally enables electronic (email) notification of its users upon the completion of various activities (in addition to all emails regarding document reviews and escalations). You may be on a distribution list for any or all of the following:

- Changes to the library
- Additions of, or changes to, cabinets
- Releases of certain documents
- Revisions to certain documents
- Deletions of certain documents

If you are on a distribution list, you will be notified via email when any of the above has occurred (see sample email on the next page). Simply click on the document link or URL in the email. The link will take you to the library, cabinet, or document in reference.

For document distributions, the links always access the most recent revision of the document, thereby assuring you always have the most recent copy of the document at your disposal. If you would like to view all documents for which you are on a distribution list within a cabinet, click the Distribution List link on the cabinet navigation bar.



Aviator E-mail Notification with Document Link and URL

Importing Files and Documents (Lotus Notes users only)

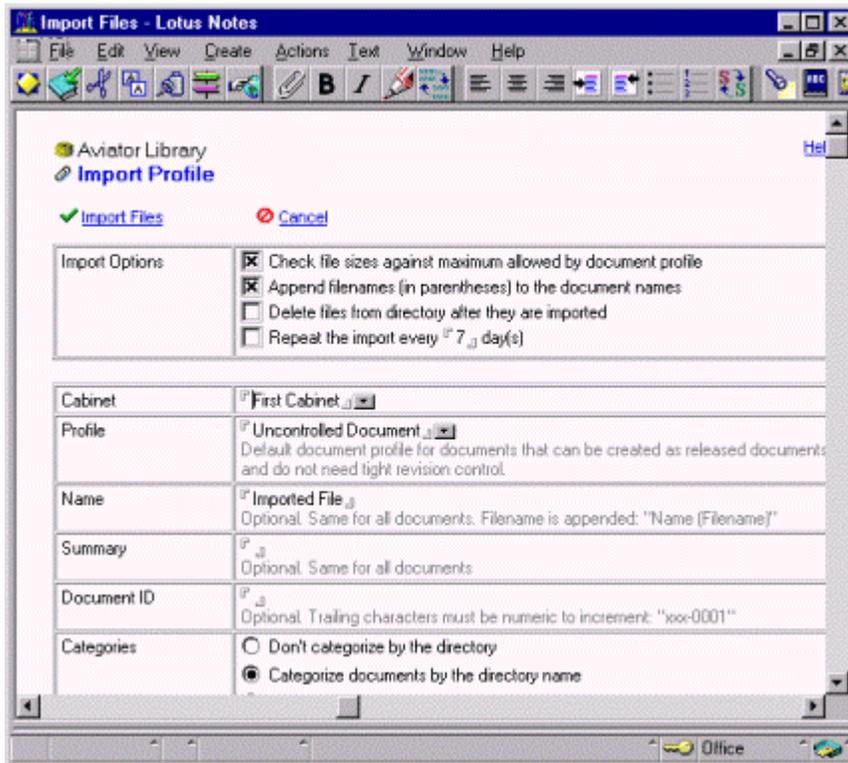
Importing files and documents is a quick and easy way to migrate shared drives and Notes databases to Aviator. While any user can perform file imports, it is recommended that only experienced Notes administrators perform document imports.

Aviator is designed to import files from one or many directories at a time. You can even schedule imports for directories that are regularly populated with files.

- 1) From the Library navigator, click the Import action to open the import view
- 2) Click the "Import Files" button at the top of the view
- 3) Select the appropriate Import Options. We highly recommend appending the file name to the document name for ease of recognition in Aviator.
- 4) Select the Cabinet and Document Profiles. Note that all documents imported use the default document attributes. Default users, editors, distribution recipients, etc., are in the document profile, so it is important that the profile is set as desired before importing.
- 5) Enter a Name and Summary - these are to be the same for all documents until manually changed within Aviator
- 6) Enter a Document ID number if applicable
- 7) Select or enter the document categories in the cabinet. Here you have the option to create categorization that mirrors your directory system
- 8) Select the Import directories

9) Click Import Files

Depending on the document profile, the documents will be created as released or as drafts. If required, you will need to access each individual document to give it a unique name, attributes, etc.



Aviator Import Profile Form

Entering a Revision History

Once a document has been released, a document manager can add a revision history to the document. The revision history usually comes from paper versions of your files. Maintaining the document's history could be critical to users that need to have the history readily available. Your organization may want to create Aviator documents at revisions greater than '1' to coincide with paper version of the document:

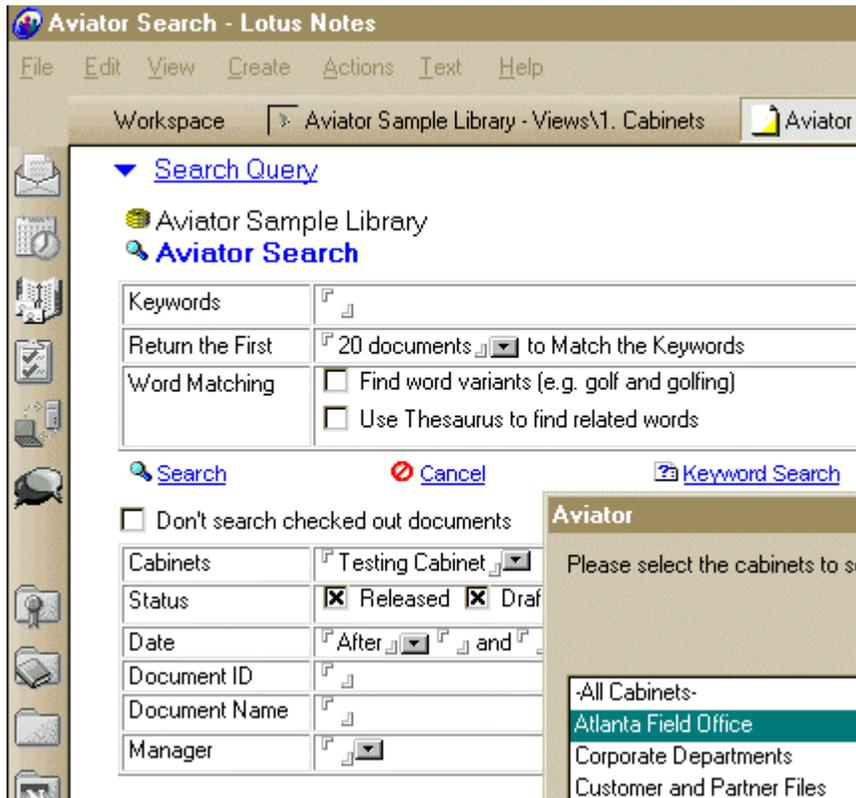
- 1) From the document attributes, click on Manager Actions and select "Create Revision History"
- 2) Fill in the table as indicated. This is the only place to capture historical information in Aviator. The document's current revision can be edited as well.

Aviator Search

Aviator Search (see search screen on next page) allows users to perform keyword or attribute searches in individual cabinets or the entire library:

- Keyword searches allow you to find a document using words and sentences that appear in document attributes or the document body (including file attachments).
- Advanced searches allow you to filter the search results by cabinet, document status, release date, name, ID, or document manager.

- Search queries can be saved with their results for future reference and to refresh at a later date.
- Auto-refresh allows you to refresh saved search results at specified intervals.



Aviator Advanced Search Form

To perform a search, select the Find Document action in the library or cabinet navigators. To access the search database, select the Aviator Search action. The search database presents search results by Date and Author, and provides additional document and search management functionality.

Downloading / Uploading files to / from Local Directories

For mobile users Aviator provides easy download of files from Aviator to a local directory, and upload of modified files when reconnected to the server. File download/upload is only available in the Notes client.

Before downloading or uploading files you must specify the local directory or directories that you intend to work with your files. This could be a temporary directory (e.g., c:\temp) or your application's working directory (e.g., c:\My Documents).

- Click on the cabinet you want to look into
- Click the Actions button on the overhead toolbar
- Select the Download/Upload Setup option
- Enter the path of your local directory or directories for your Local System
- Click OK

To download files from Aviator documents to your local directory:

- Select one or more documents in the cabinet view
- Click the download files action at the top of the view (yellow arrow)
- Optionally choose to check out the document at the same time
- Select the file(s) you want to download
- Optionally change or enter a new directory - the default directory is created from the document name and revision number with the following characters converted or removed (space, comma, dot, àáâãäåæ, ç, ñ, èéë, íïî, ðóôõö, ùúû, ýÿ, !"#%&'()*+,-./:;<=>@[\\^_`{~¢£¥§©®)
- Click OK

Read-only files are marked as read-only on your local system so you cannot accidentally modify them.

To upload files from your local directory to Aviator:

- Select one or more documents in the cabinet view
- Click the upload files action at the top of the view (yellow arrow)
- Optionally choose to check in the document at the same time
- Optionally choose to delete the files at the same time
- Optionally change or enter a new directory and refresh the file list
- Select the file(s) you want to upload
- Click OK

AVIATOR PERSONAL (Lotus Notes users only)

Aviator Personal is a document management database for your personal documents. It is not a shared database. You can:

- Create and manage your own files (as attachments) and Notes documents
- Download documents from Aviator to take them on the road
- Modify downloaded documents that are checked out to you and upload the modifications to the library next time you are connected to the server
- Refresh all the read-only documents that have been downloaded with the latest modifications made in the library
- Download and Upload files between selected documents in Aviator Personal and your local directory system.

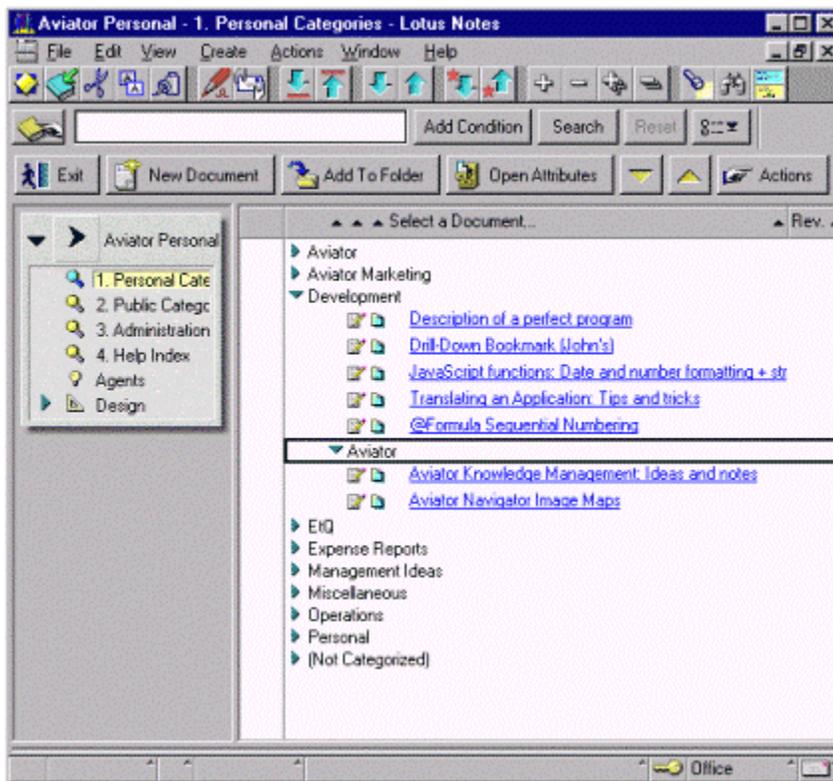
Installing Aviator Personal on your Local Workspace

The library administrator will provide access to the Aviator Personal database on the server:

- 1) Add the Aviator Personal database (avipers.nsf) icon to your workspace
- 2) Highlight the icon, and select File – Database – New Copy...
- 3) Make a copy of the database in your local Aviator directory
- 4) Delete the server's Aviator Personal database icon from your workspace
- 5) Aviator Personal is now available for your personal use.

Creating new documents in Aviator Personal

- 1) Click the “New Document” button
- 2) Enter the attributes for the new document
 - a) select the “Revision Control” option to track the document’s revision history
 - b) select the “Private” option if you are sharing your Aviator Personal database, but wish to keep the document private
 - c) add a Summary and categorize the document as well.
- 3) Click “OK”
- 4) Enter the text for your new document and/or attach one or more files
- 5) Click the “Save and Close” button



Aviator Personal

Downloading documents from Aviator into Aviator Personal

If you wish to disconnect from the server and take documents on the road with you, simply download the documents you want from the Aviator library into your Aviator Personal database on your laptop.

From an Aviator cabinet:

- 1) Select the documents you want to download
- 2) Click the “Actions” button at the top of the view
- 3) Select the “Download selected documents to Aviator Personal” option
- 4) Optionally check out the documents you want to modify in Aviator Personal (you cannot check out documents in Aviator Personal)
- 5) Click OK

Updating Aviator Personal documents from Aviator

To update documents in Aviator Personal that have been previously downloaded from Aviator:

- 1) Open Aviator Personal
- 2) Click the “Actions” button at the top of the view
- 3) Select the “Refresh all downloaded documents” option

Updating Aviator from Aviator Personal

If you have modified documents in Aviator Personal, you can upload the changes to the library from Aviator Personal or from a cabinet. Use the Upload action in Aviator Personal if you want to upload to multiple cabinets simultaneously. Use the Upload action in a cabinet if you want to check in the updated documents simultaneously.

- 1) Open Aviator Personal or an Aviator cabinet
- 2) Click the “Actions” button at the top of the view
- 3) Select the “Upload modified documents from Aviator Personal” option
- 4) Optionally check in the documents after they are updated
- 5) Click OK

See Aviator’s on-line [Help](#) for additional information about Aviator Personal.