

iDocument

User Guide & Reference Manual

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iDocument is an application designed to assist technical staff with documenting their iMIS and database instances. It enables you to associate notes and metadata with iMIS entities (Activities, IQAs, Reports, Panel Definitions) and database objects (Tables, Views, Stored Procedures, Jobs, Triggers), and generate shareable HTML or PDF documentation files.

Current Version	2.13.2102 (October 2020)
OS Support	Windows 7 or higher; Windows Server 2008/2012+
iMIS Support	iMIS 15.2 or higher
SQL Server	2008 / 2008R2 / 2012 / 2014
.NET Framework	4.0 or higher
Support	support.imis.com

1. iDocument Overview

iDocument is an application designed to assist technical staff with documenting their iMIS and database instances. It allows you to associate notes and other metadata with various entities in iMIS (such as Activities and IQAs), or objects in the database (such as Tables or Jobs). iDocument can also generate a documentation file containing all of the notes that have been entered, which you can save as an .html or .pdf file.

2. System Requirements

Component	Requirement
Operating System	Windows 7 or higher, or Windows Server 2008/2008R2/2012
iMIS	iMIS 15.2 or higher
SQL Server	2008 / 2008R2 / 2012 / 2014
.NET Framework	4.0 or higher
Browser	Internet Explorer 9 or higher (recommended)
Network	UDP port 1434 must be open on the SQL Server

3. Useful Terms

Term	Definition
Entity	Any top-level item in the left column (e.g. table, activity, job, or report).
Field	Any second-level item in the right column (e.g. column or field).
Metadata	Any user-editable information entered for an entity or field (notes, descriptions, etc.).

4. Installing iDocument

Note: It is best practice for all users to be on the same version of iDocument.

1. Download iDocument from the ASI Support Portal (https://support.imis.com/hc/en-us/articles/46424761394701/live_preview/01KTMDB0MWX2JQ52N51D4H11K9).
2. Unzip the folder and navigate to the unzipped folder.
3. Right-click on **Setup.exe** and select **Run as Administrator**.
4. When prompted to allow the program to make changes to your computer, click **Yes**.
5. The Setup Wizard will open. Click **Next**.
6. The License Agreement will display. Select **I accept...** and click **Next**.

7. Verify the default installation folder and click **Install**.
8. A progress screen will display during installation.
9. A confirmation screen will indicate iDocument has been successfully installed. Click **Finish**.

5. iDocument Setup

5.1 Launch and Login

1. Launch iDocument from **Start > All Programs > ASI Programs > iDocument**.
2. Log in using your iMIS user name and password.
3. If prompted for a license key, enter the one provided by ASI. If you need a new license key, contact **support.imis.com**. To evaluate without a license, select **Start in Trial Mode** and click **OK**.
4. You may be prompted for your database SA credentials. Declining will limit some features.
5. The first time iDocument connects to a database, it runs an initialization script requiring table-creation rights on the **dbo** object for the iMIS SQL user. Click **OK**.

You are now ready to use iDocument.

5.2 About the License Key

When first logging in, iDocument will attempt to auto-license by calling the ASI licensing API. If you are prompted for a license key at any point, please reach out to ASI Application Support at **support.imis.com** for assistance.

6. Using iDocument

iDocument supports creating and storing notes ("metadata") against various iMIS and database-related entities. The following areas are supported:

6.1 Supported Documentation Areas

iMIS Areas

Area	Description
Activities	View fields for each activity. For each field, view: iMIS Prompt, underlying data field, and field type.
User Windows	View fields included on each window. For each field: iMIS Prompt, underlying data field, field type, lookup table, source table and field. A panel icon indicates Panel Editor windows.
Business Objects	Browse BO folders and view objects in each folder. For each business object, view object details including source tables, columns, and branch hierarchy.

IQAs	Browse IQA folders and view queries in each folder. For each query, view columns, sources, relationships, filters, sorts, and query options. Note: the \$/WebFormZAttachments/ folder and its sub-folders are filtered out.
Reports	View reports grouped by category and iMIS System. For each report, view the iMIS description.
Panel Sources	View panel sources created in the RiSE Panel Editor. For each panel source, view fields and field type information.
Panel Definitions	View panel definitions and the panel layout as it appears in RiSE. For each field, view field information and the source object it references.

Database Areas

Area	Description
Tables	View columns on each table.
Views*	View columns on each view. View source code via the 'View Source' button.
Stored Procedures*	View parameters on each stored procedure.
Functions*	View parameters on each function.
Jobs	View steps for each job; last run information, step types, step commands, job state, and associated schedule name.
Triggers*	View all triggers grouped by table/view name. For each trigger: operations (Insert/Update/Delete), timing (On insert / Instead of), and source code.

* Items marked with an asterisk support viewing source code via the **View Source** button. Source opens in a new window with Word Wrap and Striped View options.

6.2 Browsing Entities and Fields

Select a tab on the left side of the application to jump to a category. A list of top-level entities loads in the first list box. Click an entity to view its information. Once selected, the second list populates with the entity's fields. The right-most column shows details about the selected item and fields for editing metadata.

Note: Items with a metadata icon indicate that the entity (or one of its fields) already contains notes. Both top-level entities and their fields can independently have metadata associated with them.

Tip: To re-select a parent entity after clicking a field, simply click the entity name again in the left list.

6.3 Entering and Editing Notes

Entering Notes:

1. Select either an entity or a field.
2. Type your notes in the fields displayed in the right column.

3. Notes are saved automatically — no Save button required.

Editing / Reverting Notes:

1. Make your changes in the right column.
2. To undo changes and revert to the original notes, click **Cancel**.
3. You will be prompted to confirm the cancellation. Click **Yes**.

Keyboard Shortcut	Action
PageUp	Select the previous field in the list
PageDown	Select the next field in the list
Ctrl + PageUp	Select the previous entity in the list
Ctrl + PageDown	Select the next entity in the list

6.4 Filtering Entities and Fields

Click the blue **Filter** button above the Field list box to filter each category independently. The filter supports two modes:

- **Show all items** — shows every item in the system.
- **Show only items with metadata** — shows only items that have associated notes.

The **Reports** category has an additional **Show All Reports** checkbox above the entity list. By default, only custom (non-system) reports are shown.

6.5 Generating Documentation

1. Click the blue **Generate Documentation** button in the lower-right corner.
2. Select the categories/areas you would like to include (at least one required).
3. Select whether to include **All Items** or **Only items with metadata**. "All Items" retrieves every item of that type. "Only items with metadata" retrieves only items that contain notes (but includes all of their fields, not just the documented ones).
4. Select the export format:
 - **HTML** — generates an HTML document of the selected items.
 - **PDF** — generates a PDF document (may take a few minutes).
 - **Word** — save as PDF and open in Word to convert.
5. (Optional) Enter header text to be included at the top of the document.
6. Click **Generate**.

Note: Depending on the options selected and your SQL server connection speed, documentation generation may take some time.

7. Options

7.1 iDocument Settings

iDocument has user-configurable settings accessible by clicking **Settings** in the top-right corner of the application.

7.2 Database Filters

Filters can be independently applied to each of the five types of database entities. Use **%** to match one or more characters, and **_** to match a single character. Separate multiple filters with **;**.

Note: Example: To filter out all tables except ASI tables, Name tables, and User tables, use the filter: **asi_%; Name%; User%;**

7.3 HTML Output Options

The generated HTML document includes these options:

- **Copy to Clipboard** — copies the HTML document to the clipboard for pasting into a rich text editor.
- **Save...** — opens a Save dialog. Available formats: **.htm/.html** (for viewing in a browser) and **.txt** (for viewing or modifying the HTML source).

8. Troubleshooting

If you have any issues with iDocument, please contact ASI Support at **support.imis.com**. Tickets are normally responded to within 1 to 2 business days.

9. Release Notes

Version	Date	Changes
2.13.2102	Oct 2020	Fixed PDF output generation
2.13.2096	Nov 2019	International license update
2.13.2095	Aug 2019	Added User Guide menu item; removed installed PDF guide, replaced with URL link
2.13.2094	Apr 2019	Fixed collation issue (CW 84602)
2.13.2079	Jan 2018	Updated licensing in ASI Core library (CW 72484)
2.13.2078	May 2017	Developed handling for WPF type casting issues (CW 65119)
2.13.2074	Mar 2017	Fixed crash on empty Panel Definition; fixed crash on empty IQA; filtered WebFormZAttachments from IQAs
2.13.2023	Nov 2016	Added value list info and required markers to business object fields (CW 61804)
2.12.1982	Nov 2016	Fixed crash on documentation generation; fixed search results navigation; added sort by last modified for BOs
2.12.1945	Aug 2016	Fixed orphaned user exceptions when login is absent (CW 54812)
2.12.1923	Jun 2016	Fixed text box rendering; added Panel Sources, Panel Definitions, and Database Triggers support; added View Source for views, SPs, functions, triggers

2.11.1505	Aug 2015	Added application tracing (CW 49624)
2.11.1504	Jul 2015	Enhancements to login control and iMIS URL handling (CW 48242)
2.11.1502	Jun 2015	Added IQA and Business Object details to metadata/documentation; fixed hidden reports display; added remote licensing
2.10.1145	Apr 2015	Added PDF export; job schedule descriptions; activity descriptions; copy/paste of read-only metadata; search interface; sync user-defined window notes option
2.8.716	Dec 2014	Integrated Core Library; improved iMIS login; standardized About dialog; fixed user-defined field crash
2.7.635	Sep 2014	Fixed SQL elevated user bug; added splash screen on startup
2.6.568	Aug 2014	Additional Reports section info; fixed first-start SQL elevated user bug
2.0.1	May 2014	Added trial mode; fixed crash on exit on certain systems
2.0.0	Apr 2014	Initial release of iDocument