Spielberg Solutions GmbH

# FileDirector

## Enterprise & SBE

**Windows Client**

**Version 3.0**

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# Table of Contents


## Welcome to FileDirector ..... 15

How Documents are Stored ..... 15
Connection to the Server ..... 16
Using a Proxy Server ..... 16
Online/Offline ..... 16
Work offline with local documents ..... 17
Online – Mode ..... 17
WinClient in a Central Server Environment ..... 17
User Licences ..... 18

## The WinClient Desktop ..... 19

Control Panel ..... 19
Document lists ..... 20
Search results ..... 20
Local documents ..... 20
Inbox ..... 20
Document Display Window ..... 20
Arrange Windows ..... 21
Toolbars ..... 21
Index Capture Window ..... 21
Split Documents ..... 21

## First Steps ..... 22

Open a Cabinet ..... 22
Open Cabinet Manually ..... 22
Open Cabinet Automatically ..... 22
Open Document Lists ..... 22
Search Results List ..... 22
Local Document List ..... 23
Inbox ..... 23
Closing Document Lists ..... 23

## Toolbars ..... 24

Tool Style ..... 24
Style 1 ..... 24
Style 2 ..... 25
Style 3 ..... 25
Configure Toolbars ..... 25
Switch Button Bars On and Off ..... 26
Customised Button bars ..... 26
Toolbar Options ..... 26

## Searching for Documents ..... 27

Search Tools ..... 27

Clear Index Fields ....27
Document Type Search ....28
Cabinet Search ....28
Filing System Search ....28
Full Text Search ....28
Info Search ....28
Previous/Next Search ....29
Search Parameters ....29
Search Using Index Fields ....29
Search using OR Combinations ....30
Input Assistance for Index Entry ....30
Search in inverted commas ....30
MRU Lists ....30
Keyword lists ....31
Date entry ....31
Memo fields ....31
ODBC database links ....31
Manual indexing using OCR zone recognition ....31
Full Text Search ....32
Searching multiple words using AND, OR, OR NOT ....32
Full text search combined with index fields ....32
Search within a Document ....33

**Document Lists ....34**

Search Results List ....34
Full Text Search Results ....34
Local Documents List ....35
Inbox ....35
Document Lists Display ....36
Document Status ....36
New ....36
Archived ....36
Checked out ....37
Read only ....37
Send ....37
Deleted ....37
Status Field ....37
Display Modes ....38
Document Type Lists ....38
Document Lists ....38
Runtime Column Customisation ....39
Column Filter ....39
Selecting documents ....40
Summarize Column ....40

**Document Display ....41**

About Documents ....41
Display Layouts ....42
Thumbnail Size ....42
Thumbnails Only ....42
Image Only ....42

Thumbnails and Image ....42
Thumbnails and Images....42
Thumbnails and Book Mode....43
Duplex View....43
Book Mode ....43
Toggle Thumbnails On and Off ....43
Open & View Multiple Documents ....43
Page Display Tools ....43
Display whole page in the image display window ....44
Fit width of page to the document display window ....44
Display page in original size....44
Zoom in....44
Zoom out ....44
Zoom Slider....44
Display selected part of an image....44
Rotate page 90° counter clockwise....44
Rotate page 90° counter clockwise....44
Rotate page 180° ....45
Maximize document viewing area....45

**Check-In and Check-Out ....46**

Check In documents....46
Mandatory fields and test during check in....46
Protected fields....47
Cancel Check in of several documents....47
Automatic Check-In Options....47
Delete new documents after check in ....47
Delete revised documents after check in....47
Do not remove from list ....47
Auto Check in of new documents ....48
Auto Check in of new documents after index edit ....48
Auto. Check in of archived documents after index edit....48
Remind to check in new documents after program end....48
Reminder to check in documents after program end....48
Check out documents ....48
Undo Check out ....49
Revisions....49
How is a revision stored? ....49
Display Revisions....49
Change Revision/ Check out ....49
Delete revision....50
Print Revisions ....50
Document type without revisions (mail box) ....50

**Document Editing ....51**

Editing Document Index Data....51
Moving Document between Document Types....52
Indexing Multiple Documents ....52
Changing Index Data for Multiple documents....52
Indexing Using the Keyboard Only....53
Copy and move with drag & drop....53

Move pages within document ....53
Move pages from one document to another ....53
Copy a document to another document ....53
Copying selected pages ....53
Creating a link to a document in a Windows-directory ....54
Indexing using OCR Forms ....54
Use a Scan Profile Configuration ....54
Full form recognition ....54
Document Type limited form recognition ....54
No form recognition - Always use this form ....54
Combine documents ....55
Combining of archived documents ....55
Combining New Documents ....55
Combining New and Archived documents ....55
Splitting Documents ....55
Scan Profile Post-indexing ....56
Duplicating a document ....56
Create Linked Document ....56
Follow Document Link ....57
Unlink Document ....57
Convert a document ....57
Create an Empty Document ....57
Delete Documents and Pages ....57
Delete single pages of a document ....57
Recovering a deleted page ....57
Remove documents from a document list ....58
Delete documents from server ....58
Undelete Documents ....58
Delete Private Emails ....58
Automatic Indexing (Forms Recognition) ....59
Codeless Connector ....59
Document Security ....59
Full control ....60
Create ....60
Delete ....60
Modify ....60
View ....60
Download ....60
Download Revisions ....60
Change annotations ....60

**Annotations ....61**

Display/Hide annotations ....61
Select annotation type ....61
Black area ....61
White area ....62
Text ....62
Line ....62
Arrow ....62
Highlight ....62
Sticky Note ....63

Mini Sticky Note ....63
Hyperlink ....63
Signature ....63
Ad-hoc Signature ....63
Stamp ....64
Hyperlink to another document ....64
Move annotations ....64
Delete annotation ....64

**Printing & Saving to File ....65**

Printing ....65
Print a Single Document ....65
Print Multiple Documents - from...to ....65
Print selected documents ....65
Print one page of a document ....65
Print several pages of a document ....66
Copy / Print Area ....66
Display Text ....66
Print document lists ....66
Saving to File ....67
Save Document ....67
Assign file name automatically ....67
Save one page ....67
Save a selection of pages ....67
Save in different formats with/without OCR text ....67
Export Document List ....67

**Scanning Documents ....68**

Supported scanners ....68
Directory scan ....68
Scanning Rights ....69
Scan Profiles ....69
Change scanner settings ....69
Set automatic value ....69
Use OCR-/Forms recognition ....70
Document Type Selection ....70
Local Scan Profiles ....71
Scan Multipage documents ....71
Scan Single Page Documents ....72
Append pages ....72
Insert pages ....72
Prepend Pages ....73
Replace one page ....73
Replace all pages ....73
Stop scanning ....73
WinClient Start-up Options ....74
Scanstation ....74
Skipbarcodepage ....74

**Import Documents ....75**

Source Text File....75
Import Settings....76
Source File....76
Field Separator....76
Number of Fields....76
Left/Right Trim Chars....76
Ignore Line Starting With....76
Full Line is Filename....76
Import from All Directories....77
Bundle All Pages....77
Document Type....77
Source Index – Target Field....77
Test Import....77
Start Import....78

# Electronic Documents....79

How EDocs are stored....79
How EDocs are Displayed....79
Navigating Through an EDoc....80
Saving to FileDirector....80
Add to Existing Document....80
Revising a Document....82
Automatic Indexing....82
Capturing Emails from Outlook....82
Email Attachments....82
Attachments as Separate Pages....83
Attachments as Separate Documents....83

# Sending Documents....84

Send documents by Email....84
Attach as a PDF....84
Configuration of Filename for Attachment....84
Sending a Single Document....85
Sending Multiple Documents....85
Sending One Page of a Document....85
Sending Selected Pages of a Document....85
Send Email as Link....86
Send Documents to users....86
The Inbox....86
Sending Documents....86
Notification....86

# Ad Hoc Workflow....87

Create an Ad Hoc Workflow....87
Edit an Ad Hoc Workflow....87
Workflow Definition....87
Add user....88
Actions....88
Email....88
Automatic Settings....88

# Process Management ..... 89

Send To Process ..... 89
Manual Sending ..... 89
Automatic Sending ..... 89
Document Receipt ..... 90
Process actions ..... 91
No action ..... 91
Confirm view ..... 91
Comment ..... 91
Approve Reject ..... 91
Check user actions ..... 92
Keep Document ..... 92
Process Status ..... 92
Configure Absence ..... 92
Sign Documents using a Signature Pad ..... 93

# Document Information ..... 94

Document ..... 94
History ..... 95
Processes ..... 95
Sent-To ..... 95
Page Information ..... 96

# Options Settings ..... 97

General Settings ..... 97
Open last used Cabinet ..... 97
Remove new documents after check-in ..... 97
Remove revised documents after check-in ..... 97
Remove local documents after sending to process ..... 97
Remove local documents after Undo check-out ..... 97
Don’t remove from search result list ..... 98
Auto Check-In new documents ..... 98
Auto Check-in External Documents ..... 98
Auto. Check-in new documents after edit ..... 98
Auto. Check-in revised documents after edit ..... 98
Reminder to check in new documents on program exit ..... 98
Reminder to check in documents on program exit ..... 98
Verify integrity of unsigned documents ..... 98
Warning before a document with 0 pages is checked-in ..... 98
Warning when a document with 0 pages is displayed ..... 99
Warning when annotating or rotating causes check-out ..... 99
Language ..... 99
Clear MRU List ..... 99
Misc Settings ..... 99
Convert to PDF ..... 99
Attachment file name composition ..... 99
Reset Zoom when displaying new page ..... 100
Use area post-indexing ..... 100
Image Enhancement ..... 100
Show post scan options ..... 100

Show line number in document lists....100
Alternate line colours in document lists....100
Show documents after single click....101
Allow floating control and list windows....101
Explorer like tree search....101
Immediate stamp embedding....101
Custom quick start program....101
Quick Start List....101
Notification....101
Disable client notification....101
Scheduler based passive notification....101
Print....102
Pagination....102
Separator....102
Standard fields....104
Print hitlist row....104
Exact scale print....104
Print using smart page rotation....104
Hitlist....104
Layout....105
WinClient Layout....105
Skin....106
Context menus....106
Full screen Lists....106
Document Viewer Reuse....106
Signatures....107
Digital....107
Using a Signature Image File....107
Configure Electronic Signature....108
Deleting Signatures....108
Local Cache....109
Document storage cache (Cache Directory)....109
Purge Cache after program exit / logout....109
Connection....109
Change Password....109
Edit Connection....110
Test Connection....110

**Reports & Scripts....111**

Using scripts....111
Script Results....112

**Template Tasks....113**

Providing templates....113
Using templates....113
Create new page....114
Refresh....114
Save....114

**WinClient Plug-Ins....115**

Installation of Plug-ins....115
Enable Plug-Ins Menu....115
Requirements for OCR Plug-in....115
OCR Index....116
Perform OCR zone recognition....116
Dual Search....116
XML File Contents:....116
OCR-Calculator....117
Adding of units and prices....117
CallTo – Reading Phone Numbers....118
Default Country Code Setting....118
HitListDocumentExport....118
Global Count....119
Usage in WinClient....119
ResponseWriter....120
Example....120
Installation....120
Configuration....120
Using ResponseWriter....122

**Retrieval Media....123**

Requirements....123
Create a Retrieval CD/DVD....124
Target Folder....124
Include revisions / history....124
Include fulltext....124
New target folder after:....124
General information....125
Certificate....125
Media ID....125
Licence Retrieval....125
Start....125
Retrieval Client....125
Installation....125
Open Cabinet with Retrieval Client....126

**Local Cache....127**

Storage location....127
Structure of the local cache....127
Cache is deleted automatically....127

**General Information....128**

Document Formats....128
Stellent Viewer....128
WinClient Settings....128
Keyboard Shortcuts....129
Help menu....130
WinClient Help....130
Repair Local Cache....130
About....130

# Welcome to FileDirector

The Windows Client (WinClient) is the primary FileDirector application for working with documents held in FileDirector Cabinets. Using the WinClient, standard tasks such as document scanning, retrieval and editing can be carried out. In addition, the WinClient is used for advanced features such as barcode reading, zone OCR indexing and process management.

The WinClient can be used with or without a connection to the FileDirector server (online or offline). In offline mode many operations can be accomplished without the use of a license.

## How Documents are Stored

FileDirector stores documents in Cabinets. There may be several Cabinets arranged in your organisation; a user is only allowed to work with those Cabinets to which he was granted access.

Each Cabinet contains different document types. Index fields are assigned to the document types, which should be filled according to the filing requirements of your documents. The retrieval information is entered into the index field. Documents are stored with this index data for easy retrieval.

Although a user has access to a Cabinet, he is only able to work with those document types in a Cabinet to which he was granted access. Additionally different rights can be granted per document type, a user may for example store documents in one document type but is only allowed to retrieve and display in a different document type.

Documents scanned in black and white are stored in TIFF; coloured documents are stored as JPEG compressed files.

Electronic documents (EDOCS) are stored in original format and can be viewed by an implemented viewer even if the relevant application is not installed. If the relevant software is installed (for example WORD) documents can also be edited. Changes are stored in regular document types as revisions, the original version of the document remains stored.

# Connection to the Server

When starting the FileDirector WinClient, you may be asked to enter the FileDirector server address to allow the WinClient to connect to a FileDirector server. This will normally happen only when the WinClient has been installed in a method other than those recommended. Please check with your FileDirector administrator for the connection information.

More information on the settings can be found in the *Options Settings* chapter

## Using a Proxy Server

If it is not possible to establish a connection between the WinClient and the server, the reason might be a proxy server.

Further details can be found in the Proxy Server chapter of the Installation manual.

# Online/Offline

The WinClient is a locally installed FileDirector module. This module connects and logs on to the FileDirector server in order to send information to, and retrieve information from a FileDirector Cabinet. Documents can be scanned, indexed and annotations can be applied documents. Information about the Cabinet and the access rights are stored the local cache of the workstation when the Cabinet is opened for the first time.

*See → Local Cache*

In Offline mode, the connection to the FileDirector server is ended. Therefore no documents can be retrieved from the server and no new documents can be sent to the server. New documents however can be created locally and local documents can be edited. If during log on for example a wrong password was specified or connection to the server failed for whatever reason a log on in offline mode is established. Make sure you are in online mode, if you want to accomplish server based actions (search, check in, etc.).

The administrator can deactivate the offline-mode for users in the client configuration to force that they use the WinClient only in online with connection to the server.

## Work offline with local documents

All pages of a document are not automatically downloaded to the local cache, so as to improve performance. Initially, only the first page is downloaded to the local cache and then every page which is displayed. If you want to work offline with the document later, all pages of the document must be downloaded to the local cache. In order to do that you must switch the mode to ***offline*** after downloading the documents (Click on the symbol ***ready*** in the left edge (corner)). If there are uncompleted documents in the local cache, you are asked if you want to download all documents to work offline with them. If you approve (confirm) with ***Yes***, you can work offline with these documents without a connection to the server.

> *Notes*
> *Downloaded documents which are not checked out can only be changed and checked in again if they have not already been revised and checked in by another user.*

## Online – Mode

If a connection to the FileDirector server exists – Online mode – each accessible function can be executed, for example; retrieve documents from server or send documents to the server.

To change from Offline mode to online mode click to the symbol in the lower left corner of the WinClient window or select Offline from the File menu.

## WinClient in a Central Server Environment

The WinClient can be installed on the FileDirector server and configured so that it can be accessed using browser software. In order for this to work, the .NET Framework 2.0 must be installed on the client. The same functions are available as if the WinClient had been directly installed on a workstation.

The only restriction is that off-line work mode is unavailable, since a connection to the server has to be established by the browser in order to start the WinClient.

After the WinClient is installed and configured on the FileDirector server, the function Add trust to this site to allow execution of browser based application needs to be run on the workstation to establish a trust relation to the server. This can be done from the FileDirector client installation page

***http://[servername]/filedirector***

Once this is complete, the WinClient can be started in the browser from the installation page by selecting Start in browser. The default link is below

***http://[servername]/filedirector/wincweb/default.htm***

If the WinClient does not start from the server this can be caused by one or more of the following:

- .NET 2.0 was not correctly installed on the client
- The branding wasn't executed before the WinClient was installed on the server. Therefore the server URL wasn't written into the App.xml
- ***Add Trust*** has not been executed on the client machine
- The security settings of the IIS directory WinCWeb prohibit access

Please check with your FileDirector administrator.

# User Licences

Users are assigned to one of the following FileDirector groups; fd-admins, fd-scan, fd-scan-named, fd-user-named and fd-user. The users are assigned the administrator.

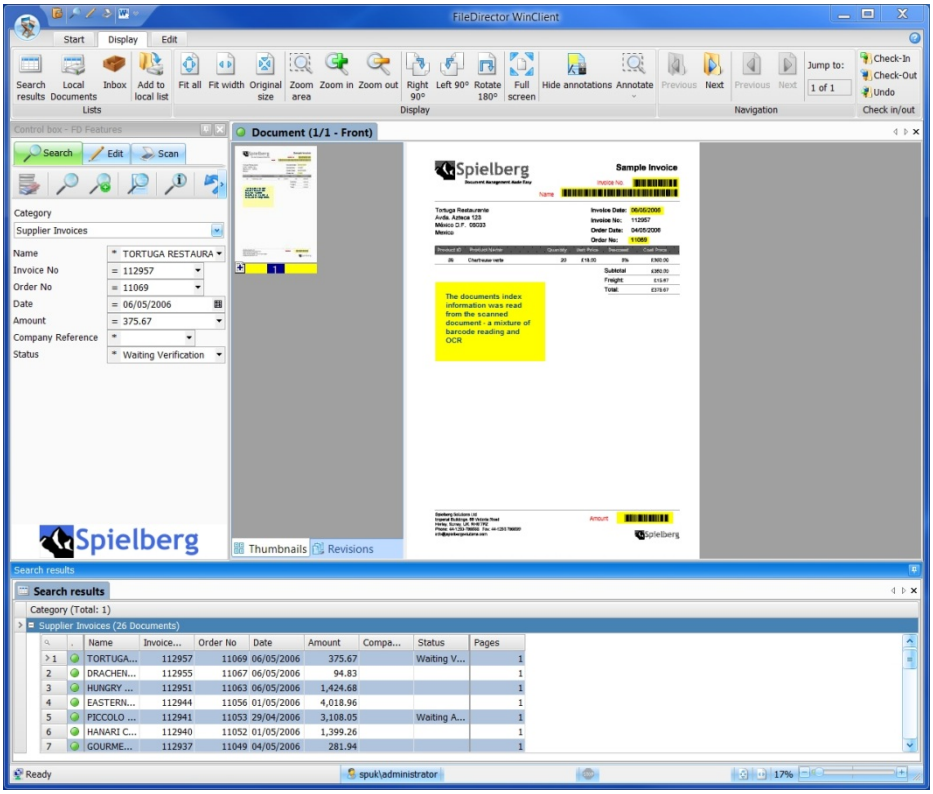
Only as many users can connect to the system and logon as licences are available. After 30 minutes of idle time (this is a default value and can be changed), the WinClient automatically logs off and frees the licence for another user. The number of licences can be displayed in WinClient under Help ⇨ Info. It is possible to specify more users in the FileDirector groups than licences available. Therefore it is possible, that a user cannot connect to the system because all licences are used. Logon will only be possible if another user logs off.

> *Notes*
> *The function Scheduler based passive notification can be selected in the WinClient options. This option could cause that the licence is not freed by the server because the WinClient establishes a connection at the set interval – even if the user is not using the opened WinClient. This only applies when WinClient is opened.*

The Groups fd-scan-named and fd-user-named should only contain as many users as named licences are available. The users specified here will always have access to the system; e.g. to scan, index and check in and search for and retrieve documents.

# The WinClient Desktop

Once the WinClient is started and a Cabinet is opened, a standard menu with icon bars and a Cabinet Control Panel is displayed. When a search is performed, the results are displayed in the Search Results list. If you double click a document in that list, it is displayed in a document display window.




## Control Panel

When a FileDirector Cabinet is opened, the Control Panel is displayed. This gives the user access to document search, scan and edit functions, dependent upon the rights of the user.

Within the Control panel, the Cabinets Document Types and associated index fields will be available. How these are displayed is determined by the Cabinet configuration. By default, the Document Types can be selected from a drop down list and once selected the associated index fields will be displayed. When the Cabinet has been configured to use the Filing System, the Document Types and selected index fields will be shown in a Tree structure, with the remaining index fields shown to the right of the tree.

The tabs in the Control Panel allow switching between Search, Edit and Scan. The tabs will not be shown if the logged in user does not have rights to perform the tab's functions. The tool icons within each tab will change depending on the tab selected and provide the necessary commands for that area.

# Document lists

Document lists are displayed in an own window. Three different document lists are available:

## Search results

The list Search results contains a list of documents found on the server by a search operation. In order to execute a search operation, the WinClient must be in online mode.

## Local documents

The Local documents list shows documents stored on your local computer, for example new documents which are not yet checked-in to the FileDirector server.

Documents downloaded from the server are also stored here as local copies. Also, documents which have been viewed are stored to a local cache.

The default name ***Local Documents*** can be customised within a Cabinet configuration, and therefore may be different from the default.

> *Notes*
> *If the option* Extras ⇨ Options ⇨ Cache ⇨ Purge cache after program end *is specified, all documents are automatically deleted from the local cache when exiting the WinClient. This does not apply to checked out or downloaded documents. If the WinClient is not closed, the cache data is automatically deleted after 12 hours, if this option is selected.*

## Inbox

The Inbox contains documents which are sent to a user by other FileDirector users or which have automatically been sent to a user by a process.

# Document Display Window

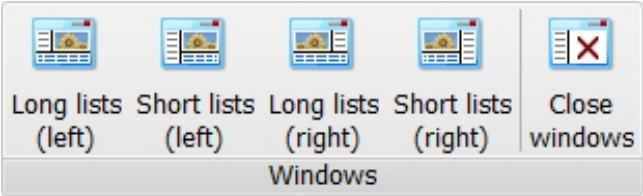
The document is shown in the document display window. Using a basic configuration with the WinClient only scanned documents can be displayed. If FileDirector Component Service installed, more than 200 file formats can be displayed, including all Microsoft Office formats, Emails and CAD drawings.

Annotations can be applied to documents with the document display window.

> *Notes:*
> *The document being displayed is always marked green in the document lists.*

# Arrange Windows

Default layouts for the Control Box, document display window and document lists can be selected, the Windows menu. This offers several options as to how the WinClient windows are displayed.




# Toolbars

The configuration of the toolbars bars can be defined, if allowed for the specific user. The rights can be defined by a FileDirector administrator. The administrator can predefine the menus and the options for the users, so that no changes are allowed for the client.

A full description of the toolbars is given within the *Toolbars Chapter*.

# Index Capture Window

The Index capture window will be displayed when a document is being imported into FileDirector by the following methods; drag & drop, Send to FileDirector, Office Link and by using the ImagePrinter.

The Image Capture Preview window will show the document being imported, or the document that is being appended or prepended to.

Using this window the document can have index data applied to it and then be saved.

## Split Documents

Using this function it is possible to split multipage documents into single page documents for separate indexing.

Selecting the split document will split the multipage document into single-page documents. For each of these newly created single-page documents a new capture window opens, once the previous one is closed. This allows each page to be classified individually.

The resulting single-page files are added to the local list in the WinClient.

> *Notes:*
> *This option does not split a single electronic document, such as a Word document. It can however split multiple electronic documents so that they can be classified individually.*

# First Steps

## Open a Cabinet

A Cabinet can be opened manually or automatically when the WinClient is started. Cabinet settings are downloaded to the local cache when it is opened. This can only be done when the WinClient is connected to the FileDirector Server. Once the settings are cached, the Cabinet can be opened when connected, or when using offline mode.

### Open Cabinet Manually

Selecting ***File ⇨ Open ⇨ Cabinet*** will display a list of available Cabinets. Double-click the Cabinet name, or select it and press the ***OK*** button to open the Cabinet.

### Open Cabinet Automatically

A Cabinet can be opened automatically when the option *Open last used Cabinet* is selected within the WinClient Options. The Cabinet that was open when the WinClient was last closed will be automatically opened.

## Open Document Lists

When a Cabinet is opened, the Local Documents list is automatically opened, if there are any documents that are currently being stored locally, such as new documents, or ones that have been checked-out from the server for revising.

### Search Results List

The list of Search results is displayed after a successful search operation on the server has been performed. If the Search Results list was already open, it is automatically refreshed. The Search Results can only be displayed when the WinClient is connected to the FileDirector server.

> *Notes*
> *A setting on the server limits the maximum number of documents to be returned to the Search Results list to 1000 entries. This default value can be changed by an administrator*
> *See → Installation Guide*

### Local Document List

The Local Document List can be opened by selecting ***File ⇨ Open ⇨ Local Documents***

### Inbox

The Inbox can be opened by selecting ***File ⇨ Open ⇨ Inbox***

## Closing Document Lists

Each of the document lists can be closed by pressing the X, top right of the list display.

# Toolbars

Most WinClient actions can be selected using the tools available on toolbars. The tools displayed, and how they are displayed can be configured by the user, or can be centrally configured by a FileDirector administrator.

## Tool Style

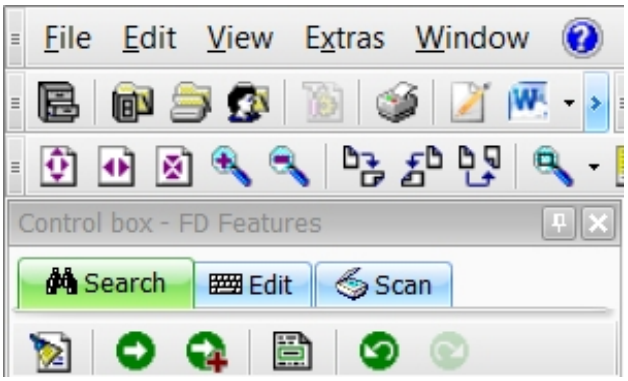
The style in which the tools and menus are displayed is set within the Layout tab of the WinClient Options

There are three styles available; Style 1, Style 2 and Style 3.Select the required style from the *WinClient Layout* dropdown.

In Styles 1 and 2, the main toolbars remain the same, but the toolbars within the Cabinet Control Panel will differ. In Style 3, the toolbars and Control Panel tools will change, and there will be no menu bar.

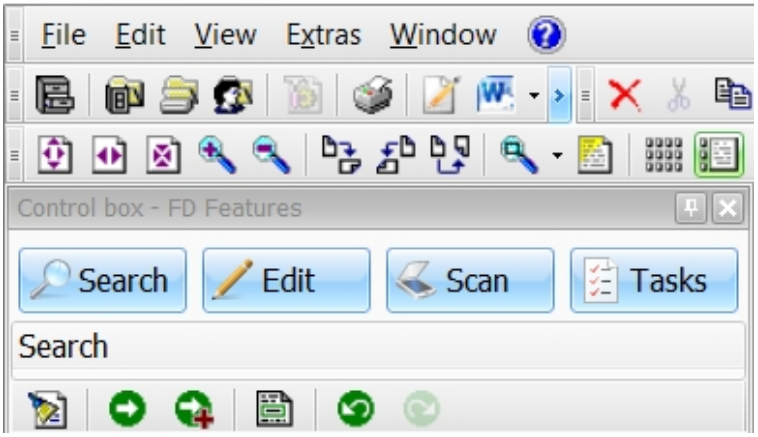
### Style 1

An example of Style 1 is below. Hovering over a tool will display a tooltip. The available tools can be customised within the WinClient by selecting the arrow at the end of each tool set.



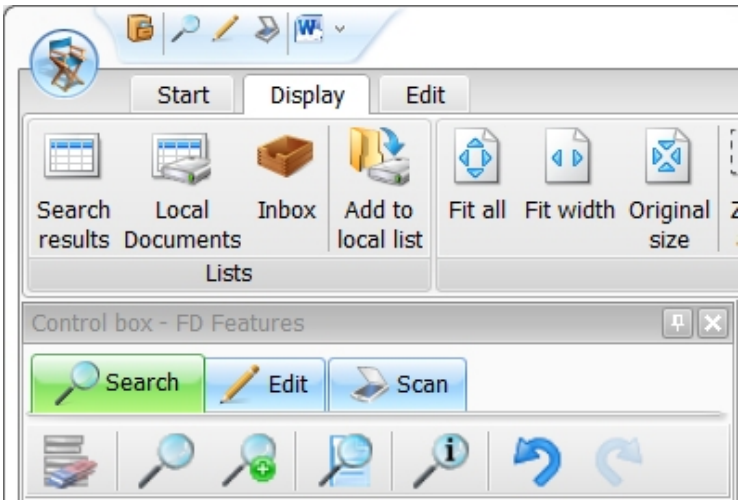
### Style 2

An example of Style 2 is below. Hovering over a tool will display a tooltip. The available tools can be customised within the WinClient by selecting the arrow at the end of each tool set.




### Style 3

An example of Style 3 is below. Hovering over a tool will display a tooltip. The available tools cannot be customised within the WinClient




## Configure Toolbars

The configuration of the toolbars bars can be defined, if allowed for the specific user. The rights can be defined by a FileDirector administrator. The administrator can also predefine the menus and the options for the users, so that no changes are allowed for the client.

The configuration options are not available when Style 3 is selected as the *WinClient Layout*.

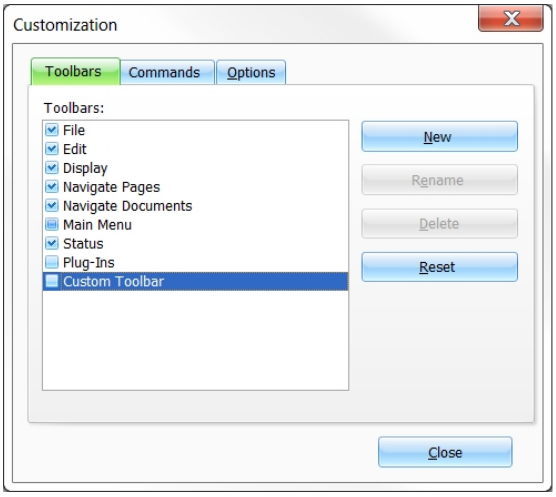
When there are small arrows between the button bars, fast configuration can be specified. If no arrows exist, it is possible (with sufficient rights) to use the setup menu by double clicking the free area of that bar.

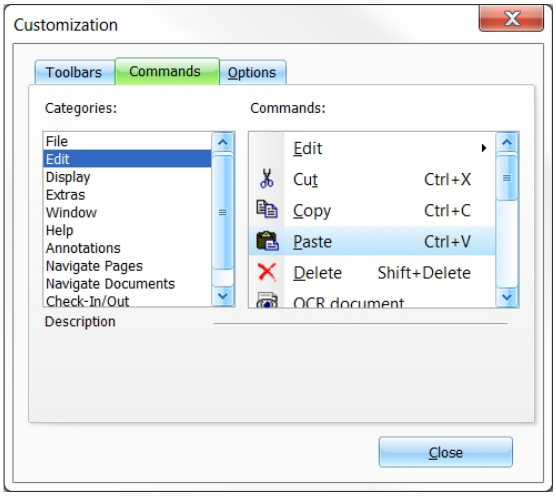
## Switch Button Bars On and Off

Using ***Add/Remove Buttons***, each toolbar button can be turned on or off by highlighting the option, and single-clicking. When the tick to the left of the toolbar option is present, it is selected, and the button will be displayed.

## Customised Button bars

User defined button bars can be created by selecting ***Customise*** from ***Add or Remove Buttons.***




Create or select the custom toolbar from the Toolbars tab. If the toolbar has a tick to the left, then it will be displayed. To add tools to the bar change to the Commands tab, after selecting a category, drag the required Commands to the toolbar.

## Toolbar Options

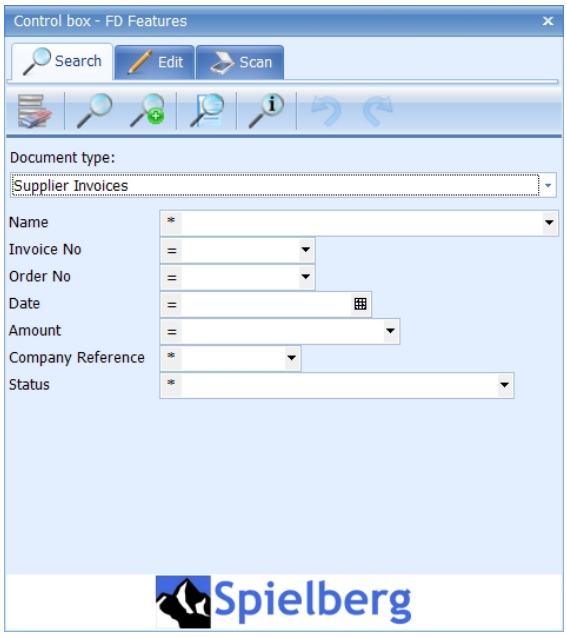
Various options for toolbars can be configured by selecting the Options tab. Options available include whether to always show full menus, or only shown them after a short delay, and whether to use large icons on the toolbar rather than standard size icons. You can also select whether to display toolbar tooltips.

# Searching for Documents

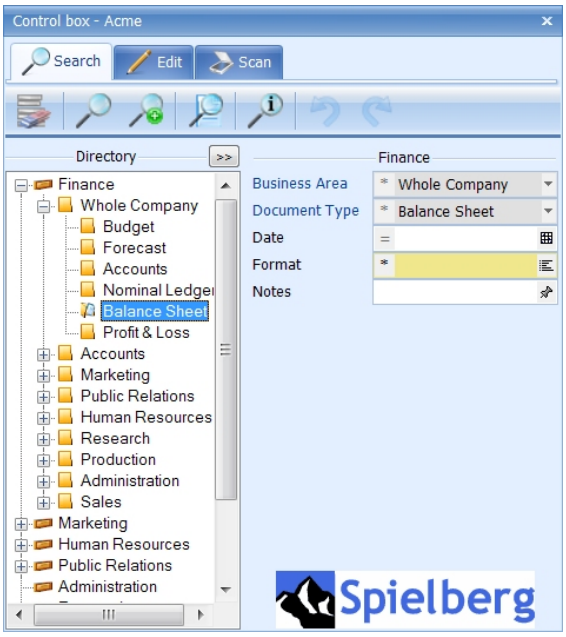
All searches for documents held within a Cabinet are performed using the Search tools in the Cabinet Control Panel. Searches can be performed within one Document Type or across all the Document Types a user has rights to.

Documents can be searched for using the index data entered against each document, or searching the contents of the documents themselves by using Full Text search. For Full Text Search, the OCR Server option is required, and must have been configured to OCR the relevant Document Types.

Example Cabinet Control Panels are shown below, with the Search tab selected.




Default index structure display




Index structure using Filing System

## Search Tools

### Clear Index Fields

Selecting this tool will clear any information currently shown within the index fields currently displayed. Using this tool within the Search tab does not edit a documents index data

## Document Type Search

Select this tool to perform a search within the selected Document Type, using the data entered into the index fields.

## Cabinet Search

Select this tool to perform a search across all the Document Types the user has rights to, using the data entered into the index fields

## Filing System Search

When the Cabinet has been configured to use the Filing System, the Document Types and selected index fields are displayed in a tree structure. Searches can be performed by right-clicking on a tree node and selecting ***Search.*** If the node has sub-nodes, these will be included in the search by default. Setting the *Explorer like search* option will restrict the search to the selected node only.

## Full Text Search

Searching for documents by their content can be performed by selecting the ***Full text Search*** tool. After entering the relevant word or phrase, the search can be performed within the selected Document Type, or across all Document Types the user has rights to by selecting the appropriate tool, available to the right of the Full Text Search data entry field.

To be able to use Full Text Search, the documents must have had OCR performed on them on the FileDirector Server using the optional OCR Server module.

## Info Search

The Info search tool will extend the available index criteria that a document for be searched against. When a document is stored in FileDirector, it automatically has certain data stored with it, such as its creation date within FileDirector. The following criteria will be made available when Info Search is selected:

Created by
Created on
Archived on
Changed by
Changed on
Checked-out by
Checked-out on
Status
Pages
Identifier (GUID)

The entry fields for these properties appear in the toolbox below the standard index fields of the selected document type. This option can also be selected in ***Extras ⇨ Info Search***.

### Previous/Next Search

The search criteria entered during a session is stored in FileDirector. During the session, a user can browse the searches performed and reuse them. Select the relevant search information by browsing through the stored list with ***Previous Search*** or ***Next Search***. The criteria for each search will be shown in the index fields.

## Search Parameters

When searching using index fields a search parameter can be selected for each field separately that specifies the search conditions.

| Parameter | Description |
|---|---|
| * | Wildcard search |
| = | Exact match |
| > | Greater than value specified |
| >= | Greater or equal value specified |
| < | Smaller than value specified |
| <= | Smaller or equal value specified |
| () | Empty value search |
| <>() | Search for all documents with index field filled |
| .--. | Range search<br>With this option two values have to be specified, a lower and an upper limitation for the range. |
| <> | Not equal search |

## Search Using Index Fields

To search using index fields in a Cabinet, select Search tab of the control panel. Specify the document type, enter search information and if necessary set the search parameter.

Click the ***Search*** button to perform the search within the selected document type or the ***Extended Search*** button in order to perform a comprehensive search over all document types.

The number of documents found and listed in the Search Results list depends on the search criteria entered. If for example, the user searches with a unique document number (e.g. invoice number); only one document should be found and displayed.

If the search parameter is changed to ***Greater or equal***, additionally all documents with numbers greater than the value specified, should be listed.

## Search using OR Combinations

If several words are entered into an index field for search, the search performed in this index field is performed with a logical OR link between these words.

***Example:***

A document has been filed under the name ***Grey***. If you are not sure how the name is spelled, you can enter several possibilities, such as:

***Grey Gray Graye***

The search is carried out for all single words entered; however the index field contents would have to match one of the names searched for.

If a document has been stored under ***John Grey***, it would not be listed with this search. The search operation can only be performed with a wildcard search: ****Grey***.

*Notes*
*When using an Oracle database this function is not available.*
*Normally only an asterisk * is attached*

## Input Assistance for Index Entry

The search parameters which can be set in a drop down list in front of the index fields can be used as input assistance. Searching with wildcards such as an asterisk * is possible.

Example:

A search with ***Mi*** will not return ***Smith*** as result, it will only return all documents beginning with ***Mi*** In order to have ***Smith*** returned, the search must be performed with ****Mi**** or ***Smi****

The asterisk can be used in the middle of a word – e.g. when searching ***Me*er*** all names including ***Meyer*** and ***Meier*** are listed.

*Notes*
*Using an asterisk * as a wildcard is only valid when SQL server 2000 or above is used as database backend. Using Oracle, a % character must be used for wildcard searches.*

## Search in inverted commas

To ensure that a search in WinClient or WebServer is always performed with quotes around the search text, the following entry can be added to the FileDirector server web.config ("0" = off, "1" = on):

***<add key="FDServer.SetQuotedIndexSearch" value="1" />***

*Notes*
*This can only be carried out by a user with administrative privileges to the FileDirector Server*

## MRU Lists

With The Most Recently Used (MRU) Lists the entries that have previously been used are listed. It is therefore possible to repeat the entries without retyping the search criteria again. The keyboard list can be opened with ***ALT ⇩***. Using the

mouse, the drop down list can be viewed by clicking the arrow on the right side of the index field.

### *Clear MRU list*

The MRU list keeps up to 32 entries. As soon as the list is full the last entries will be overwritten automatically. If you want to delete MRU-lists, select click on *Extras ⇨ Options ⇨ General ⇨ Clear MRU-List.*

## Keyword lists

If keyword lists are specified for certain index fields, the valid entries can be selected directly. Using the keyboard this list can be opened by ***ALT⇩*** .

Shortcuts can be used for keyword list entries which will avoid typing of complete keyword values and accelerate keyboard entry.

Several keywords can be selected simultaneously by checking them in a drop down list. They are entered into the index fields separated by semi colons. The keywords can be listed by clicking on the icon at the end of the keyword field

> *Notes*
> *If keyword lists are configured so that manual entries are possible, these manually entered keywords are held in the local cache of the relevant user.*

## Date entry

If a date is to be entered, a calendar opens up near to index field, where the relevant date can be selected with the mouse.

The Calendar can be displayed by clicking on the icon at the end of the date field

## Memo fields

If a field is configured as a memo field, the memo can be open by clicking on the Pin symbol at the end of the memo field.

## ODBC database links

Using ODBC links index fields can be automatically filled with data held in an external database when a unique index value is entered in the field configured as an ODBC link field.

If for example a client number is entered, the client name and address can be automatically added from a connected database to the index fields, while scanning of when you are in ***Edit*** mode.

The connection of index fields to a database must be configured as an ODBC connection on the FileDirector server by an administrator.

## Manual indexing using OCR zone recognition

Manual OCR recognition can be performed on an area of an image and the data read can be inserted into an index field. This function required an OCR Server licence.

Please see the section on the *OCR Index* plug-in.

# Full Text Search

The content of documents can be searched in order to retrieve a document which contains certain words or phrases. This can only be achieved if the documents have been processed using the optional FileDirector OCR Server module. The OCR full text module can be configured to process selected Document Types. Depending on the configuration, the full text information is only available for retrieval after a scheduled process has added the full text information to the database.

To perform a full text search, select ***Search*** in the control panel. Select the Document Type and activate the text field which is used to enter search information by selecting the ***Full text search*** tool. To start full text search enter the word(s) and perform the search by clicking the tool to the right of the field.

## Searching multiple words using AND, OR, OR NOT

When you for search multiple words in full text search, connect the entries in the search field.

### *AND - function:*

When entering ***Robert AND Mueller*** in the full text search field, all pages are found containing BOTH terms.

### *OR function:*

If invoices and credit notes are stored in a Document Type, searching for ***invoice OR credit***, will return all documents containing the word invoice OR credit.

### *OR NOT function:*

When looking up. ***invoice OR NOT Mueller***, all invoices are listed NOT containing the name Mueller.

## Full text search combined with index fields

When a full text is searched for a term, you can search in combination with index fields. If the index fields are filled out as well as the full text search, the result of the search will be limited.

> *Notes*
> *When a search for a term is performed in the full text that is also found in one of the index fields, a page may be displayed that does not include the term in the text on the displayed page. The reason is that index data will be additionally written to the full text. Thus it is possible to find documents via index terms additionally via the full text.*

## Search within a Document

When displaying a document that is within a Document Type set for full text OCR, a full text search can be performed within the document. At the top of the document display window a search bar is available. To search, enter the search word, and then press the ***Search*** tool to the right of the bar.

If found, the word searched for will be highlighted wherever it occurs in the document. If there are multiple occurrences, using the ***Next*** and ***Previous*** tools on the search bar, each occurrence can be displayed.

Additionally, the highlight colour can be changed by selecting the ***Choose Colour*** tool on the Search bar, and then selecting the colour required.

# Document Lists

The three different document lists in WinClient serve different purposes and allow processing of documents in different ways depending on the document list used.

A document may appear simultaneously on different lists, for example as a server document or as a local copy on the local document list.

## Search Results List

After a successful search operation the results are displayed on the Search Results list. If this list is already open, it is updated with the relevant results. This list will only be displayed if the WinClient has an active connection to a FileDirector Server.

If the search is performed in one document type, only documents stored in this particular document type are listed. If the search is performed over all document types assigned to the relevant user, the search results are listed separately for each document type. The name of the document type and the number of documents found is displayed.

For each document the document status is displayed, this enables a quick overview of which documents are available and which documents have been checked out by other users or yourself.

The document list can be sorted within each document type by selecting the relevant column header. Documents are displayed by double clicking on the relevant list record.

### Full Text Search Results

When performing a full text search, the results will be displayed in the Search Results list. Each record shown in the list will to a specific page of a document, for multi-page documents, and the page number will be shown. Additionally, a ranking is displayed for each page as to the relevance of the page in relation to the search performed.

Electronic format documents, such as MS Word documents and PDF's are included in the search, however, when selecting a document to view, page 1 of the document will always be displayed.

# Local Documents List

The documents displayed in this list are stored locally on the computer, and may be new documents, documents checked out for editing, or ones downloaded by the user.

New documents scanned, imported or sent to FileDirector are stored and displayed in the local document list before they are checked-in to the FileDirector server.

Documents which have been checked out and documents from which a local copy was created are also displayed in the local document list.

For each document the document status is displayed giving you a quick overview, which documents are available and which documents have been checked out by other users or yourself.

The document list can be sorted within each document type by clicking the relevant column header.

Documents are displayed by double clicking the relevant list record.

The default name ***Local Documents*** can be customised within a Cabinet configuration, and therefore may be different from the default.

# Inbox

The documents displayed in this list are sent to a user by other FileDirector users or are sent automatically by processes, if the user has been specified as a recipient in a process designed in the process management.

For documents to be received from other users or by processes the WinClient must be connected to the FileDirector server.

For each document the document status is displayed giving you a quick overview, which documents are available and which documents have been checked out by other users or yourself.

For each document on the list an action can be specified by process management. This can be a task, such as Approve/Reject, Comment or View. This task must be carried out by the relevant user in order to move a document to the next process step.

Documents are displayed by double clicking on the relevant list record.

If a document is received, the Inbox must be refreshed. In *Extras ⇨ Options ⇨ Notification* an automatic notification can be specified if a new document arrives on the personal list. Press F5 to refresh the personal list manually.

> *Notes*
> *Please note, that during the specified scheduled intervals a contact is established to the server and the client licence is not returned as long as the WinClient is open.*

# Document Lists Display

By default, the document lists are displayed as tabs, and one list can be viewed at a time.

By right-clicking on a tab a user can select to display the lists horizontally or vertically, so that the contents of each list can be viewed at the same time. In Tab groups can be defined. As soon as two tabs are displayed for the document lists (for example search list and local list), a tab group can be created by right-clicking and selecting ***New horizontal tab group*** or ***New vertical tab group***. A new area appears with the document list marked previously. The lists can be moved by drag and drop from one group to the other or with the context menu using ***Move to previous/next tab group***.

# Document Status

Each document on a document list has a defined status. The status shows if a document is stored locally on a computer or on the FileDirector server. If a document is being edited by another user, it is displayed with ***read only*** status and cannot be edited at that time.

## New

Documents with New status are stored locally on the computer and have not been checked in to the FileDirector server. They are only available for this specific user on this computer and appear on the local document list.

## Archived

Archived denotes that a document is checked in to the FileDirector server. In order to be edited or changed a document has to be checked out to prevent other users from changing it simultaneously. Depending on configuration this can be done manually or automatically. Documents of this status can appear on all three lists.

A document with an ***Archived*** status is downloaded from the server if it is displayed on the search list. If an archived document appears on the local list, it is a local copy downloaded to the PC. They are also still displayed on the local list after checking in if a local copy is maintained. That way documents can also be displayed without connection to the server.

***See also → General settings/Options***

## Checked out

A document is displayed as Checked Out, if it has been checked out from the FileDirector server by the user himself. During this process a copy of the document is automatically created and displayed on the local document list. This status is displayed for each checked out document listed in your personal list. For other users these documents are displayed with status Read only and cannot be edited.

## Read only

Documents displayed with the status Read only are currently checked out by another FileDirector user. These documents can be displayed but cannot be checked out in order to be changed. This status can appear in all three document lists.

> *Notes*
> *In urgent cases (for example: checked out documents are stored on a hard disk which is damaged) this status can be reset by an administrator by clicking Undo Check-out.*
> *ATTENTION: Check-In of previously checked out documents is not possible. They must be deleted from the local list and must be checked out again for editing.*

## Send

Sending is displayed for all documents currently being sent to the FileDirector server. These are either new documents being checked in for the first time or previously checked-out documents which are checked in again after editing is finished. This status can appear in all three document lists.

## Deleted

Deleted documents from the server can be shown by switching on the info search in Extras ⇨ Options ⇨ Info Search and selecting the entry ***deleted*** in the field Status. Performing a search will show the deleted documents, they can be undeleted with the right mouse context menu command

## Status Field

The Status field on the local document list can display details on problems that may have occurred when attempting to check-in a document. As an example, if a user attempts to check-in a document when a field must have an entry, but is left blank, the document will not be checked-in and the Status field will show the reason for this.

These hints can be incorrectly entered mandatory fields or a field that should be checked for validity by the server (e.g. if a valid date is used).

> *Notes*
> *The behaviour of documents during Check-In and Check-Out depends on various settings. Different automatic actions can be configured. See Check In and Check Out*

# Display Modes

The document lists can be displayed in a variety of ways depending upon user preference. A user can determine the way that multiple Document Types are displayed, and how documents lists within a Document Type are shown.

## Document Type Lists

### *Default View*

Each document list shows the documents grouped by document types and all document type groups are in dropped down mode. The number of document types is displayed at the top of the list.

If an extended search is performed, all document types are listed.

### *Detail View On/Off*

Using the ***Toggle Detail View*** tool the list can be switched between detailed view and list view of the document types.

### *Drop down document list*

To drop down a document type list, click the ***Plus*** symbol, which is located on the left of the document type name.

### *Minimise document type list*

To minimize a document type in a document list, click the ***Minus*** symbol, which is located on the left of the document type name.

### *Display only one document type*

To display only one document type in the list, click the ***Spyglass*** symbol to the left of the column headers of the document type.

### *Display all document types*

To display all document types in the list, click the ***Cross*** Symbol to the left of the column headers of the document type.

## Document Lists

### *Sort ascending/descending in a document type*

The documents in a list of document types can be sorted by any column. Click on the relevant column. Another click on this column header toggles the sort order.

Alternatively Sort ascending or Sort descending can be selected in the context menu which opens when right clicking on the column header.

After a performed search, the result can be re-sorted via the column sorting by holding the Shift-Key.

### *Changing the column order*

The sequence of the columns of a document type can be changed by drag and drop of the column header to the new position.

### *Changing the column width*

The width of a column displayed in a document type can be changed.

Method 1:

> *Move the mouse cursor to the dividing line between the column headers. The mouse cursor will then change to a double headed arrow. By holding down the left mouse button the dividing line can now be moved.*

Method 2:

> *Move the mouse cursor to the column header of the column to be changed and right-click. Select Best fit, which automatically fits the width of that column. When selecting* **Best fit (All columns)** *all columns of that document type are automatically adjusted.*

## Runtime Column Customisation

If a document type uses a large number of fields, they may be unreadable because they are too narrow depending on the monitor size and resolution. It is possible to select certain columns for display and make others temporarily hidden. Right-click on the column header and select ***Runtime Column Customization***. A small window appears into which index field columns can be dropped using drag and drop. They will not be displayed. In order to display all columns again, minimize the list and then change to detailed view.

### *Open list*

To open a group of columns for document display click the Plus box, on the left of the Document Type name.

### *Minimize list*

To close a group of columns in order to hide the document list, press the ***Minus*** box, on the left of the Document Type name.

## Column Filter

For each column a drop down arrow is displayed. Filters can be defined for the index data listed in this column. The list can be filtered for blanks, non-blanks or entries archived already.

Custom filters can also be configured which can filter the index values of a column for certain ranges:

# Selecting documents

Among the general selecting procedures you can use commands from the right-click mouse menu, when you are in a document list.

The options are:

| | |
|---|---|
| Select All | All documents are selected |
| Toggle | Current selections are reversed |
| Remove | All documents are unselected |

# Summarize Column

When a document list contains a field that holds numeric values, the total value held in that field for all the records displayed can be calculated. To do this, right-click on the field in the document list and select Summarize column. The total value will be displayed in a pop-up window.

# Document Display

## About Documents

A document in FileDirector is either a one page or a multipage document. One page of a document can be either a scanned page or by an electronic format document, such as an MS Word, Excel or a PDF file

The WinClient has very flexible display utilities. If installed alone it is able to display TIFF and JPEG files, the formats used to store black/white, greyscale and colour scanned documents.

When the ***FileDirector Component Service*** is installed, the WinClient is able to display more than 200 different file formats including all Microsoft Office formats and several CAD drawing formats.

One FileDirector document can contain different formats, for example a scanned page and a Word document.

If Component Service is installed and you want to display a page, you can retrieve the document and browse through it.

Each electronic document is displayed in FileDirector as one page of a document, even if it contains many pages within itself.

If the Component Services are not installed, these files are displayed as icons and the relevant application must be installed in order to display them.

# Display Layouts

When a document is opened in the Display window, the default view shows the document thumbnails and the first page of the document. There are also several other views that can be selected, and can also be defined as the default view by a FileDirector administrator.

## Thumbnail Size

When thumbnails are displayed, the size at which they are displayed can be selected. The default size is 100%, but the thumbnails can also be displayed at 125% and 150%. Select the required display size by clicking on the relevant button at the bottom of the thumbnail display.

This feature may have to be enabled by the addition of the following key to the WinClient configuration file ***app.xml***

***<add key="FastpicZoomAllowed" value="True" />***

## Thumbnails Only

This view will display the thumbnails images of the document pages only. Double-clicking on a thumbnail will display the page. You can return to the thumbnails by double-clicking on the displayed page. The thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

## Image Only

Using this view will display the document pages only. Thumbnails will not be displayed. Double-clicking on the displayed page will change to the Thumbnails Only view. Double-clicking on a thumbnail will display the page.

## Thumbnails and Image

This view displays thumbnail images of the document pages, and the selected page of the document. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

## Thumbnails and Images

The thumbnails of the document pages will be displayed together with two pages of the document at the same time. When this layout is selected browsing through the document using Next/Previous page will move one page at a time. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

### Thumbnails and Book Mode

The thumbnails of the document pages will be displayed together with two pages of the document at the same time. When this layout is selected browsing through the document using Next/Previous page will move two pages at a time. By clicking in the thumbnails pane, the thumbnails can be scrolled through using a mouse wheel. A tooltip displaying the image filename will be displayed when the mouse is hovered over a thumbnail.

### Duplex View

The thumbnails of the document pages will not be displayed. Two pages of the document will be displayed at the same time. When this layout is selected browsing through the document using Next/Previous page will move one page at a time.

### Book Mode

The thumbnails of the document pages will not be displayed. Two pages of the document will be displayed at the same time. When this layout is selected browsing through the document using Next/Previous page will move two pages at a time.

### Toggle Thumbnails On and Off

In all the display layouts apart from Thumbnails Only and Image Only, you can toggle between displaying the thumbnails and images, or just the thumbnails by double-clicking on the displayed page or the thumbnails. When thumbnails are displayed, use can scroll through them using a mouse wheel by first single-clicking in the thumbnails pane.

### Open & View Multiple Documents

Multiple documents can be opened and viewed at the same time. This is achieved by right-clicking on the document display and selecting ***Duplicate View***. This will create two document tabs, each of the same document. You can now select to view a different document in either of the document tabs.

Both documents can be viewed simultaneously by right-clicking on one of the document tabs and selecting either ***New Horizontal Tab Group***, or ***New Vertical Tab Group***.

## Page Display Tools

The display of a document within the display window can be changed, for example by zoom and rotation. The display tools are available on the toolbars

Some or all of the display tools may not be available when displaying electronic documents.

## Display whole page in the image display window

The whole of the displayed page will be shown in the document display window.

This is also available by right-clicking on the document display window.

## Fit width of page to the document display window

The document display window will fit the width of the document to the size of the display window.

This is also selectable by right-clicking on the document display window.

## Display page in original size

Selecting this will display the document at its maximum size zoom level. When displaying TIFF or JPEG files, each pixel of the image is displayed as one screen pixel.

This is also selectable by right-clicking on the document display window.

## Zoom in

This tool will increase the zoom factor, making the displayed document larger.

## Zoom out

This tool will decrease the zoom factor, making the displayed document smaller.

## Zoom Slider

When using Style 3 WinClient layout only, a Zoom Slider will be displayed in the bottom right corner of the WinClient. This allows you to zoom in and out of the displayed page by sliding the marker along the bar. Alongside the slider are the ***Display whole page*** and the ***Fit width*** tools.

## Display selected part of an image

You can display a part of an image by dragging a rectangular box around the relevant part with left mouse button.

## Rotate page 90° counter clockwise

This will rotate the displayed page 90° counter clockwise based on the current view.

This is also selectable by right-clicking on the document display window.

## Rotate page 90° counter clockwise

This will rotate the displayed page 90° clockwise based on the current view.

This is also selectable by right-clicking on the document display window.

## Rotate page 180°

This will rotate the displayed page 180° based on the current view.

This is also selectable by right-clicking on the document display window.

> *Notes*
> *Pages of archived documents can be rotated temporarily without checking out this document. Therefore users which are only allowed to retrieve documents and not to edit are allowed to rotate a document for proper display.*

A rotation is only stored and displayed during the next retrieval of the relevant document, if it is checked out, rotated and again checked in. This is the only way rotations are stored.

## Maximize document viewing area

With this option the page can be displayed in full screen mode. The Cabinet Control panel and any document lists are hidden and the document display window will be maximised within the WinClient window. You can also select Selecting this option again, will revert to the standard display. You can also use ***F12*** to toggle the display mode.

# Check-In and Check-Out

New documents are stored locally on the workstation and shown in the local documents list. They are not available for other users until they have been checked in on the FileDirector server. Afterwards the document is stored in the Cabinet and is available for retrieval.

To edit a document which is stored in a Cabinet you have to check it out first. Only then it is possible to change the document. FileDirector ensures that only the user who has checked-out the document can change it, however, a checked out document can be retrieved. Any other user will be able to view the unchanged version in read-only mode. Each change of a document is only stored in the Cabinet and available for other users if the document is checked in again after the changes have been made.

## Check In documents

Documents with a status of New are stored locally on the workstation and are not stored in the FileDirector Cabinet. They are shown in the local documents list.

Documents with status Checked Out are always displayed on the local document list and also on the Search list depending on the search criteria used.

The documents may also appear in the Inbox if they were sent from another FileDirector user or by process management.

Select ***Check-In*** in order to check in the selected new or changed documents into the FileDirector Cabinet.

This can be done by the toolbar tool or by right-clicking on the selected document(s) and selecting ***Check-In***

When checking in, the document is sent to the FileDirector server where it is then available for retrieval by other users.

### Mandatory fields and test during check in

If mandatory fields have been specified, the index must match the field properties before the document can be checked in. There are several types of mandatory fields:

Field must be filled completely, empty not allowed or valid date must be specified. If a document is not checked in because of a mandatory field, an appropriate hint about incorrect index appears in the field ***Upload Status***.

### Protected fields

There are protected fields which are greyed out and inactive in the WinClient or fields which are greyed out after a document has been checked in. Protected fields cannot be changed. A date field with automatic date for example can always be protected. A manual entry of index can be protected after check in so that the index cannot be changed afterwards. The configuration of protected fields is done by an administrator user.

### Cancel Check in of several documents

Several documents can be selected and checked in simultaneously. The status bar at the bottom of the WinClient window displays check-in status information. The left progress bar shows the progress over all documents to be checked in. The right progress bar shows the progress of the current document. A Stop button is located between the progress bars which will stop check in process.

## Automatic Check-In Options

Documents can be checked in automatically. This can be specified for new documents or checked out documents.

The automatic check in can be set within the *Extras ⇨ Options ⇨ General* tab. The following affect the check in of documents:

### Delete new documents after check in

A new document is stored on the local document list of the user. When this option is set, the document is automatically deleted from the local list when the document is checked in. If this option is not set, the document remains on the local list with status ***Archived***.

### Delete revised documents after check in

An already archived document which has been checked out appears on the local list of the user. When this option is set, a document with status checked out is deleted from the local list when being checked in again. If this option is not set, the document remains on the local list with status ***Archived***

### Do not remove from list

A document list is displayed after a search operation. If a document from this list is edited, it is checked out and checked in again. This setting determines if a document is removed from the previous search list after check in or not.

### Auto Check in of new documents

With this option set new documents are automatically checked in directly after scanning. If this option is used, the index should be entered before scanning in order to check in the document with correct index information. If documents are automatically checked in without an index, a revision is automatically created when the index is specified (not in a document type specified as mail box).

### Auto Check in of new documents after index edit

If this option is set, new documents are not checked in immediately but will be after index editing. With this option a short control or amending of index information is possible, before checking in.

### Auto. Check in of archived documents after index edit

If documents are already archived on the FileDirector server it may be annoying to check out documents manually for editing and afterwards check in. It may useful and speed up working if check in and check out is done automatically when editing.

### Remind to check in new documents after program end

If new documents are not checked in, they cannot be retrieved on the server. If the user should check in new documents before exiting the WinClient then this option should be set. When this option is set the user is reminded to check in the new documents when the WinClient is closed.

### Reminder to check in documents after program end

With this option set the user is reminded to check in documents which are checked out when the WinClient is closed.

*Notes*
*Please note that the automatic functions always need a connection to the server. If the WinClient is used in Offline mode, no check in or check out can be performed.*

## Check out documents

Documents with status ***Archived*** can be checked out from a FileDirector Cabinet. If a document is checked out, a copy is stored on the ***local document list*** of the work station and displayed on the Local document list. During the time a document is checked out, it is displayed with status ***Read only*** for all other users. A different user can only check out this document after it has been checked in again.

Select ***Check out*** from the toolbar or click with right mouse button on the document list in order to check out the selected documents.

# Undo Check out

With the option ***Undo Check out*** it is possible to change the status of a document from ***Checked out*** to ***Archived***. The document is then on the same version as it was before it was checked out. Changes which have been introduced during check out are not stored.

Select ***Undo Check-Out*** from the toolbar in order to reset the status for the selected documents.

This command can only be performed by an administrator or by the user who has previously checked out the document.

> *Notes*
> *In certain circumstances, checked out documents may need to be reverted to the Archive State by a user other than the one who checked-out the document. This can be done by a FileDirector Administrator*
> *ATTENTION: In this case checking in of documents previously checked out is not possible. They have to be deleted from the local list and checked out again if they need be changed.*

# Revisions

All changes on documents in FileDirector are stored as revisions. It is not possible to perform a change of a document without storing the changes as revisions.

## How is a revision stored?

In revisions of scanned pages which are stored as *.tif or *.jpg files only the changes, not the complete document, are stored. If pages are appended they are stored as additional *.tif or *.jpg files.

When electronic documents (see EDocs) are changed they are stored as a complete copy because the changes are done by another application (for example Word).

## Display Revisions

The displaying of revisions is protected and must be granted as a right. To display the revisions click the ***Revisions*** tab, which is available when the Thumbnails are displayed alongside the document? The tab appears in the thumbnail part of the display window. With the drop down list you can select and display the different revision in order to recall the document changes. Changes to the document indexing are also stored as a revision.

## Change Revision/ Check out

Only the most recent revision can be checked out and changed. A warning is displayed if the user tries to check out an earlier revision. This also applies for electronic documents (EDocs).

## Delete revision

A revision cannot be deleted.

## Print Revisions

Select the relevant revision. In order to print single pages, select the pages to be printed in the thumbnail display and select the ***Print*** command either in the main menu or in the context menu of right mouse button.

To print the current page right-click on the document display and select ***Print***. What is being printed always depends on the current selection.

## Document type without revisions (mail box)

If a document type is set up as a mail box by a FileDirector Administrator, it does not create revisions.

# Document Editing

Existing documents can be edited in many ways, and can depend on whether it is an archived document in a Cabinet or a new document on a local list. Editing of documents will also depend upon the rights of the user.

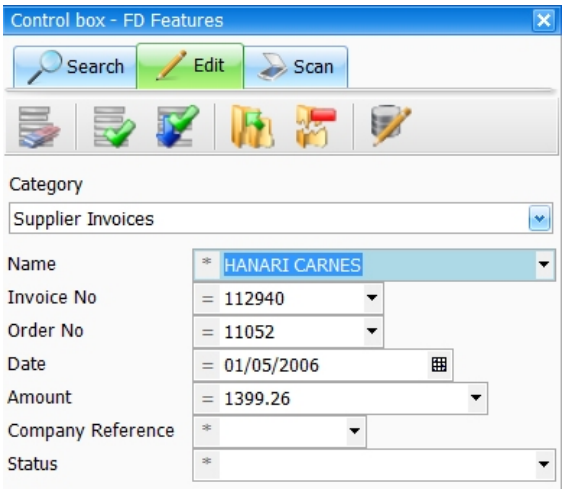
The Control Panel Scan options include the appending, prepending and inserting of pages into existing documents. Page can also be edited by adding annotations to the pages.

Additionally, the index information associated with a document can be added and changed, whole documents or single pages of a document can be deleted, and documents can be combined or split.

## Editing Document Index Data

Index information stored to a document can be added or edited at any time. The relevant user must have rights to modify documents.

The editing of an index field is carried out using the Control Box which displays the index information for the current document. Only the index fields of the document type in which the document is stored are available for editing.




Each change of a document which has been already checked in to a document type is stored as a revision after checking in again.

Select the document to be edited in the document list. If the document is already archived, it can be displayed after retrieving it.

Select the ***Edit*** tab in the control box. Select the document type. The index fields relevant for the document type are displayed. New index can be entered into the fields or existing index data can be changed.

Click on ***Save changes*** in order to carry out the changes.

# Moving Document between Document Types

Select the document to be edited in the document list. If the document is already archived, it can be displayed after retrieving it.

To move a document to a different Document Type select the ***Edit*** tab in the Control Box. Select the new Document Type. The index fields relevant for the Document Type are displayed. New index data can be entered into the fields or existing index data can be changed.

Click on ***Save changes*** in order to carry out the changes.

# Indexing Multiple Documents

Select the first document to be indexed from a document list. If the documents are already archived a search operation needs to be performed first to list them.

Select the ***Edit*** tab in the control box.

Enter new index information or change existing information in that document type.

Click ***Save Changes and Move to Next Document***. Using this will automatically move to the next document on the list.

During editing the index data can be preserved when moving to the next document. This is achieved by a setting within the WinClient app.xml.

***<add key="PreserveFieldsOnEdit" value="true" />***

*Notes*
*If this setting is only applied to the local WinClient app.xml, the next time the WinClient is updated, the setting will be lost. To set this permanently, the change must be made to the app.xml held on the FileDirector server. This must be done by a server administrator.*

# Changing Index Data for Multiple documents

The index data applied to multiple documents can be changed simultaneously by selecting the documents within the Document list, selecting the ***Edit*** tab in the Control Box and then editing the index data. When ***Save changes*** is selected. All the selected documents will have their index data changed

Only those fields that had their data changed will be saved for the selected documents. All other fields will retain their original data. When a field has been edited, the index data will be highlighted in yellow.

# Indexing Using the Keyboard Only

If you want to index documents using only the keyboard, you can move from one index field to the next by hitting Return When this is done in the last field, the focus jumps to the tool save changes and go to next document. Hitting Return again will save the changes made, and move to the next document in the list.

*Notes*
*Using* **Alt** ⇩ *keyword lists, date fields and previously used index can be displayed in a drop down list and used for fast manual indexing.*

# Copy and move with drag & drop

Pages within a document can be moved and copied, or moved and copied to another document

## Move pages within document

To move pages within a document, the pages are selected in the thumbnail view and by holding left mouse button moved to the target position.

A blue line shows the target point where the page will be moved.

## Move pages from one document to another

If one page is to be moved from the current document to another document, select the pages in the thumbnail view and move them to the target document in the search list.

The pages are attached to the target document and can then be moved to the final position in the document.

## Copy a document to another document

A whole document can be copied by selecting it on the document list and dragging it using the left mouse button onto another document.

The original archived document remains and if necessary it can be deleted.

## Copying selected pages

When pressing the CTRL-Key while scrolling, the pages can be scrolled and then copied Pages can be copied inside a document and also from one document to another.

### Creating a link to a document in a Windows-directory

Moving documents via drag & drop from a windows directory to a page, a link to this path is created.

> *Notes*
> *Please keep in mind that the link remains on the page even if the file does not exist in the specified path. This may apply to another user who accesses the document, but does not have rights to the location of the linked document*

## Indexing using OCR Forms

Predefined forms with OCR and/or barcode zones can be configured using Enterprise Manager, and then applied to documents within the WinClient, so as to fill index fields with data read from the documents.

Usually the OCR is associated with a scan profile, which will perform the OCR recognition during the scanning process.

If the OCR needs to be performed on documents already held in FileDirector, it is possible to run the OCR recognition by selecting the documents in the WinClient and starting the OCR recognition by selecting ***Edit ⇨ OCR Document***

### Use a Scan Profile Configuration

With this option the settings are used which have been configured in the scan profile the document was scanned with.

### Full form recognition

With this setting all forms are checked for an identifier, configured in the Enterprise Manager and the documents are identified, sorted and indexed to the target document types.

### Document Type limited form recognition

If there are several documents defined for one document type, only these forms will be used for recognition. If the documents are sorted before scanning, you will have faster and better recognition.

### No form recognition - Always use this form

When this option is selected a specific document can be chosen, which is used for the recognition. Is an identifier configured, the recognition for separating sheets pages can be used during batch scanning.

# Combine documents

Using ***Combine documents*** in the ***Edit*** tab of the Control box several documents can be combined to a single new document. It is also possible to append one or more documents to a specified document. This depends on the status of the documents to be combined.

## Combining of archived documents

Select the documents to be combined. The selected documents are appended to the document selected as the last one.

If documents with the status ***Archived*** are combined, the appended original documents are not deleted. If these documents should be deleted this must be carried out as an extra action.

## Combining New Documents

If documents with the status ***New*** are combined, the appended documents can be deleted afterwards as they have not been archived on the server.

## Combining New and Archived documents

If documents with the status ***New*** and ***Archived*** are to be combined, the archived document must be retrieved and checked out first. After check out they are stored in the local document list. Now the documents to be combined can be selected. They are appended to the document selected last. If the appended document has a status of ***New***, it is deleted from the local list. If the archived document is appended to the new document, the archived document stays on the server. After the documents have been combined they must be checked in again.

# Splitting Documents

***Split documents***, available in the ***Edit*** tab of the Control box, allows a document to be split into two parts. In the thumbnail display the split position can be specified, the splitting is done from the selected page. All pages which follow the currently displayed page form a new document with identical index information.

If the document being split has the status ***Archived*** the status is changed to ***Checked-out*** and the part of the document removed is listed as a new document in the local document list.

In order to retrieve those documents they have to be checked in again (if necessary after index change).

# Scan Profile Post-indexing

Documents are scanned in with the batch scan option via a scan profile configured for post-indexing.

The documents are scanned in as batch without index data and are provided by the server through the post indexing to the users named in the scan profile.

As soon as a user who is designated for post-indexing clicks on the ***Post Indexing*** tool, the server provides a batch for indexing. It appears in the ***Local documents*** list of the user as a checked-out document with several pages.

The user can start then post-indexing.

The user chooses the appropriate document type and completes the index fields. Once the last filled index field is confirmed with Return, the WinClient highlights the tool ***Save changes***.

The first page of the batch appears on the Local documents list and is marked as a new document.

If the following page of the batch belongs to the document just created, it can be added to the previous document using the shortcut ***CTRL +***.

If one or more pages have been added to a previous document by accident they can be transferred back to the batch through the shortcut ***CTRL -***

Once the document has been indexed, it can be checked-in.

# Duplicating a document

To duplicate a document, select it in the document list and right-click. Select ***Duplicate Document***. When a document is duplicated it appears in the local documents list with the same index data as the original document, but with the status set to ***New***. The index data can be changed before checking in the duplicated document.

Please note that duplicated document is totally separate to the original document.

# Create Linked Document

Selecting this option will create a new document with the same index information as the currently selected record on the Search Results list. The new document will be linked to the existing document that it was created from. When viewing the new document subsequently, the source document can be retrieved by selecting Follow Document Link from the image display right-click option.

The new document, after being created, can have pages added to it.

# Follow Document Link

When a document has been created from an existing document using the *Create Linked Document* option, the source document can be retrieved by selecting this option

# Unlink Document

The link between documents can be removed by selecting this option.

# Convert a document

By using this option a scanned page can automatically be converted to an editable Word-document. The page will be scanned via OCR and saved as a .doc file. The OCR engine must be installed on the client to use this function and a client OCR licence is required.

> *Notes*
> *As the conversion is done by the OCR text recognition, it might be necessary to edit the text depending on the quality of the source.*

# Create an Empty Document

Select ***New document*** from the ***Scan*** tools in the Control Box in order to create an empty document without pages. The document is created in the local document list of the selected document type. This function allows empty documents to be created as containers for later scanning.

# Delete Documents and Pages

Documents can be removed from a document list or the document itself is deleted. This depends on the status of the document and the document list currently used.

## Delete single pages of a document

Display the document and select the page in display window. In thumbnail view you can also select several pages. The page can be deleted via the main menu or the context menu.

## Recovering a deleted page

If a page has been deleted from an archived document and not checked in again, the version prior to the deletion can be restored by clicking ***Undo Check out***. If the document has already been checked in again, the page is present in the previous revision.

A page deleted from a new document must be rescanned.

## Remove documents from a document list

### *Local documents*

The local documents list contains new or downloaded documents. These can be deleted any time without affecting the server documents.

Documents with the status ***Checked out*** must be checked in again before they can be removed from the local document list. If documents remain on the local list after they have been checked-in will be determined by the automatic *options* set. During check in, if a document with a status ***of checked out*** cannot be checked in, check the status of the document on the server. If it is shown as ***checked-in*** it can be deleted from the local list.

### *Inbox*

Document from the Inbox can be deleted without deleting the relevant server document. If a document is stored in the Inbox by a process, it can only be deleted once the process is complete.

## Delete documents from server

If a document with the status ***Archived*** is deleted from the ***Search*** list, the server document is marked as deleted, and will not be returned in any searches. Documents with status ***Read only*** will disappear from the list, but they will appear again after a new search operation is performed which matches these documents.

Select the documents to be deleted and click on ***Delete*** on the ***Edit*** toolbar or right-click on one of the selected documents and select ***Delete***.

## Undelete Documents

If a document is deleted in the WinClient, a flag is set in the database, marking the document as deleted. Using ***Info Search*** a deleted document can be shown and displayed again.

If the document needs to be undeleted, select the document in the list, right-click and select ***Undelete Document***.

## Delete Private Emails

Within a Document Type that has been configured to store emails, you can permanently delete private emails. This is not dependent upon having Delete rights within the Document Type.

With one or more email documents selected, right-click on one of them and select ***This is private email***. You will be asked to confirm that the emails are private, and that you wish to delete them. If you confirm this, the emails will be permanently deleted from the server.

# Automatic Indexing (Forms Recognition)

Using text recognition, index fields can be filled automatically by reading zones on the page. The forms recognition must be configured by a FileDirector administrator. If the pages to be scanned always contain the same structure, a form with defined reading zones can be utilised by the system.

- The following are required for zone recognition:
- OCR Licence
- Installed Component Services and OCR Engine on the client
- Stored forms with zone definitions
- One scan profile with OCR recognition activated
- Documents to be scanned with sufficient quality

If OCR recognition is configured on the workstation, the user can perform OCR recognition by clicking ***OCR Document*** on the ***Edit*** menu. This function is useful if, for example, documents are to be indexed.

# Codeless Connector

Index information can be taken from external applications with the use of the Codeless Connector. With a configurable keyboard shortcut the field content of the external application is automatically transferred to the index fields linked in FileDirector. The connection of the fields and the shortcuts are configured in Enterprise Manager.

*Notes*
*The Codeless Connector can also be used with JAVA applications. For each work station using the Codeless Connector a licence is required.*

# Document Security

If a user has full control on a document, that user can access and specify security settings on a document. If for example a different user needs to edit a document which is normally not accessible to the user, they can be granted explicit rights to that document, by the user with full control.

If a user should be denied access to a specific document they would normally have rights to, a user with full control can deny view rights.

To specify the rights on a document, select the document in the list select ***Extras*** ⇨ ***Security*** from the menu.

A window for the specification of rights appears. Click ***Add*** and add the user or group for which you want to give certain access rights. The following rights can be granted or denied

## Full control

This enables the user given full control to grant rights to other users.

## Create

If Create is denied for a user, that user may create documents on the local list, but they cannot check them in. This is only applicable for new documents. Appending or changes to existing documents is not denied if this option is denied.

## Delete

When Delete is denied, the user may not delete archived documents from the server. Local documents with a status of ***New*** may be deleted. Documents from the Inbox may also be deleted, if they are not currently active within a process.

## Modify

Index may be changed, pages may be appended or annotations may be set.

## View

If View is denied, the user cannot view the document.

## Download

With Download denied, a user can search for index data, but the document pages are not displayed with the document as the user is not allowed to download pages to the local cache.

> *Notes*
> *The management of the local cache and the login to the workstation is important when using this option. If standard authentication is used, it may lead to a lack of security, when two users with different rights work on one work station.*

## Download Revisions

With this right denied, the user may only download the latest version of the document, but is not allowed to download earlier revisions.

## Change annotations

When annotations are set on a page, the user cannot change them unless they have the rights to do so. With annotations, certain parts of a page can, for example, be hidden.

# Annotations

Annotations can be added to *.TIF or *.JPG pages of a document. Annotations can appear as highlighted areas displayed in colour, lines, arrows, hyperlinks etc. These annotations do not change the original document and are displayed as an overlay of the original image.

When annotations are added to, or removed from a page, the document is treated as if it is revised. After adding annotations to a page a document can be checked in to the Cabinet again, creating a new revision.

Changing annotations is only allowed when the specific right is set. In this way for example text parts of pages can be hidden by putting a white or black area above them which cannot be moved by certain other users.

If a page has an annotation a ***Plus*** symbol appears at the left corner in the thumbnail view.

## Display/Hide annotations

Select the Display/Hide annotation tool to toggle the display of annotations on or off. Annotations can only be hidden or displayed by a user who is allowed to change annotations.

## Select annotation type

In order to add an annotation to a page of a document it must be displayed in display window. The page must be stored in *.TIF or *.JPG format.

The annotation type to be added to the page can be selected from two locations:

Select the relevant annotation type from the list of ***Annotations*** on the toolbar. The default icon for this is the area zoom tool. This will change according to the annotation type selected. Alternatively, right-click on the page in the display window, highlight ***Annotate*** and then select the annotation type required.

### Black area

Select ***Black area*** and draw a rectangular area on the displayed page. It is filled with black, and the part of the page behind the rectangle will be blacked-out.

You can change the colour within the rectangle by double clicking on the box, select ***Choose colour***, and select the colour needed.

## White area

Select ***White area*** and draw a rectangular area on the displayed page. It will be filled with white, and the part of the page behind the rectangle will appear blank.

You can change the colour within the rectangle by double clicking on the box, select ***Choose colour***, and select the colour needed.

## Text

Select ***Text*** in order to add a text annotation to a page. A text annotation has no background colour. Draw a rectangle on the displayed page, and when you release the left mouse button, the properties of the annotation type are displayed in a window. Enter the text, and select font and colour. After clicking ***OK*** the text annotation is displayed on the page.

The text of a text annotation is recognized when full text reading is configured. A document can be found by typing text from a text annotation into the full text search.

## Line

Select ***Line*** to draw a line on a page. While holding down the left mouse button, move the mouse to draw the line, and release the left button to complete the line.

The colour of a line can be changed by double clicking it. Select ***Choose colour***, select the colour needed and click ***OK***.

## Arrow

Select ***Arrow*** in order to draw an arrow on the page. While holding down the left mouse button, move the mouse to draw the line, and release the left button to complete the line.

The colour of an arrow can be changed by double clicking on it. Select ***Choose colour***, select the colour needed and click ***OK***.

## Highlight

Select ***Highlight*** and draw a rectangular area on the displayed page. This will emphasize a part of the image without hiding the content. This annotation works like a text marker used on paper.

The colour of the highlighted area can be changed by double clicking on it. Select ***Choose colour***, select the colour needed and click ***OK***.

## Sticky Note

Select ***Note*** to add a note to the page. The note has a yellow background.

If this tool is selected, keep left mouse button pressed at the position where the note should start. Drag the mouse to the position where the note should end and release the mouse button. The properties of this annotation type are displayed in a window. Enter the text and select font and font properties. After clicking ***OK*** the note is displayed on the page.

## Mini Sticky Note

Select ***Mini sticky note*** to add a mini note to the document or page.

A popup window will open, allowing you to enter text.

The mini sticky note will show a note icon on the page or the document. By clicking on the icon the note will be opened, and the note can be read and edited if required.

On images, such as scanned or imported TIFF or JPG images, multiple mini notes can be applied to a page, and positioned as required. On electronic format documents such as MS Word documents, only one mini sticky note can be added, and the note icon will be displayed in the top left corner of the display window.

## Hyperlink

Select ***Hyperlink***, in order to create a link to a URL on a page.

If this annotation type is selected, drag a window in the area where you want to place the hyperlink. Once the mouse button is released, a window is displayed where the properties of the hyperlink are specified.

Specify a description of the hyperlink to be used for display on the page. Select a font and colour for the text.

The hyperlink can be a link to a URL, for example an external website. Enter the web address in the field ***URL***.

## Signature

To set a signature an image must be defined first. Select *Extras ⇨ Options ⇨ Signature ⇨ Choose your signature image*. You can define up to three different signatures for one person. To set the signature a password must be entered, the same password must be configured for all three signatures. The picture of the signature will be embedded in the tiff file of the document page and cannot be deleted.

## Ad-hoc Signature

Adding an ad-hoc signature to a document requires the use of a supported signature pad, which is used to generate the signature. The picture of the signature will be embedded in the tiff file of the document page and cannot be deleted.

### Stamp

Select ***Stamp***, in order to add a stamp to a page. Follow the selection arrow to the right and select the relevant stamp.

If this tool is selected the mouse cursor switches to a crosshair symbol with the selected stamp in the background. Move the stamp to the proper position on the page and drop it with a click to the left mouse button.

> *Notes*
> *a) Stamps are only available when they have been configured in Enterprise Manager by an administrator user.*
> *b) Stamps (for example with colour areas) are always translucent.*
> *c) Stamps can be predefined in a scan profile to automatically put them on the first page or on all pages of the document.*
> *d) For embedding of stamps on a page, for example when the page is to be downloaded or sent via email, it is saved in *.jpg format.*

### Hyperlink to another document

Open the document to which the annotation should be placed. Search for the document to which the link to be added should point. Now you can pull the document by drag and drop on the displayed page. A link is created which is assembled from the index information of the document to be linked.

Several documents can be selected and pulled simultaneously as links to the document. The links are created one under the other on the page.

When viewing a link, an additional tab will be shown to display the linked document.

> *Notes*
> *To delete a hyperlink, left click on the hyperlink in order to select it. If it is displayed in red, it is selected and can be deleted.*

## Move annotations

To move an annotation, select it by pressing the left mouse button. Drag it to the new position and release the mouse button to drop the annotation at the new position.

## Delete annotation

To delete an annotation, select the relevant annotation and select ***Delete*** from the toolbar or use the context menu of the right mouse button.

# Printing & Saving to File

Documents and document lists can be printed and exported from FileDirector in a number of ways.

## Printing

The printing options of allow the printing of single or selected documents and the printing of single and selected pages of a document.

You can print TIFF and JPEG formats with WinClient alone. If ***Component Services*** is installed, more than 200 different formats, including Microsoft Office formats and Adobe PDF files can be printed.

### Print a Single Document

To print a single document, click on the document you want to print in the document list.

Select ***Print*** from the ***File*** menu or by right-clicking on the document record.

### Print Multiple Documents - from...to

To print several documents which are listed one after the other on the document list, click on the first document of that range. Hold the ***SHIFT*** key and click on the last document of that range in order to select them.

Select ***Print*** from the ***File*** menu or by right-clicking on the document record.

### Print selected documents

In order to print several selected documents from a list, click on the first document to be selected press ***CTRL*** key and select more documents to be printed.

Select ***Print*** from the ***File*** menu or by right-clicking on the document record.

### Print one page of a document

Open the relevant document and display the page to be printed. Select the image display window and select ***Print*** from the ***File*** menu or by right-clicking on the displayed page.

## Print several pages of a document

You can select several pages of a document in thumbnail display for printing. Open the relevant document; display the pages either in ***Thumbnail view and image*** or ***Thumbnail View*** only.

Hold the ***CTRL*** key pressed and click the pages to be printed in thumbnail view. Select ***Print*** from the ***File*** menu or by right-clicking on a thumbnail.

## Copy / Print Area

With this option an area of the page being viewed can be selected. Once selected, the user can choose from four options:

Choose whether to send the selected area to the printer, to send it at exact scale to the printer or to copy it to the clipboard. From the clipboard it can be pasted within another application, within an email for example.

The Clipboard (Text) option OCR's the area and the recognized text is saved into the clipboard. The text can be pasted into other applications.

> *Notes*
> *An OCR Server licence is required for this option. With this, it can be used by all WinClients that are connected to the server without installing the OCR engine on each workstation.*

## Display Text

When viewing a document that has been full text OCR'd, the text of the document can be copied to the Windows clipboard. Selecting the ***Display text*** tool on the ***Edit*** toolbar will open a popup window containing the text read from the document.

Select ***Clipboard*** to copy the text to the clipboard. If the document being viewed is an electronic format document, such as a PDF or an MS Word document, the complete document text is available. For TIF or JPG scanned or imported documents, only the text from the currently displayed page will be available.

## Print document lists

To print a list of the selected documents, choose ***Print Document list*** from the right-click options

> *Notes*
> *When a search on the FileDirector server is performed, a maximum number of documents to be displayed on a document list is specified. This maximum value is by default set to 1000. If more than 1000 documents need be printed and listed in the WinClient this value can be amended on the server by an administrator.*

# Saving to File

## Save Document

Select the document to be saved in the search results list; right-click and select ***Save as...*** The pages of the document are saved in the location specified during this process.

## Assign file name automatically

The content of an index field can be chosen as the file name. To do this, the mouse cursor must be positioned on the index field to be used for file naming. Rich-click on the document and choose ***Save as…***If the mouse cursor is not over an index field, the original TIFF file name is selected for saving.

## Save one page

Right-click and select ***Save as…*** in the display window, only the displayed page is saved, using the original TIFF file name.

## Save a selection of pages

Change to the thumbnail view in the display window and select the pages to be stored. Right-click and select ***Save as…***

## Save in different formats with/without OCR text

Documents can be saved via the ***Save as…*** option in different formats. If you want to convert a scanned page into an editable text, you have to install the OCR engine on the local client. For this an OCR client licence is required. During the storage process the OCR recognition will automatically be done when using appropriate formats.

The following formats can be used for saving:

| | |
|---|---|
| PDF (*.pdf), | Excel 97 (*.xls) |
| PDF with Text (*.pdf) | Text (*.txt) |
| Word 2000, XP (*.doc) | Text with line breaks (*.txt) |
| Word 97 (*.doc) | Unicode Text (*.txt) |
| Excel 2000, XP, 2003(*.xls) | Unicode Text with line breaks (*.txt) |

## Export Document List

The index information from all or selected documents can be exported to file from any of the Document Lists. Select the documents for which the index information is to be exported and then select ***Export Document List***. A file name can then be selected, and the information can be saved in one of the following formats:

XML File (*.xml)
HTML File (*.html)
Text File (*.txt)
Excel Sheet (*.xls)

# Scanning Documents

The WinClient allows the storage of pages to new documents or the appending and prepending to existing documents in several ways. Several scanners are supported without the need for additional driver installation. Depending on the scanner, black and white, greyscale or colour documents can be created.

## Supported scanners

The support of a scanner depends on the available drivers. Several Canon drivers are integrated in the system. Other scanners can be used via TWAIN or ISIS device drivers, delivered from the manufacturer with the scanner. ISIS support is an option, and a licence is required for the WinClient to support ISIS device drivers.

The WinClient supports many Canon Document Scanners directly without additional drivers, including the following. Other drivers may be added from time to time.

| | | |
|---|---|---|
| DR-2010C | DR-4010C | DR-7090C |
| DR-2050C | DR-5010C | DR-7550C |
| DR-2080C | DR-5020 | DR-7580 |
| DR-2510C | DR-5060F | DR-9050C |
| DR-2580C | DR-5080C | DR-9080C |
| DR-3010C | DR-6010C | DR-C125 |
| DR-3020 | DR-6030C | DR-M140 |
| DR-3060 | DR-6050C | DR-M160 |
| DR-3080C | DR-6080 | DR-X10C |
| DR-3080CII | DR-7080C | CR-180 |

In addition to the above document scanners, the Canon MS300 & MS500 microfilm scanners are supported.

In order to use the scanners, scan profiles are configured using Enterprise Manager, which can be then used within the WinClient. Users can temporarily adjust the scan profiles during a session.

## Directory scan

A scan profile can be configured as a ***Directory scanner***. Instead of using a scanner, the scan profile will import files from a defined path, either a local or a UNC path. This scan profile can be configured to delete the files from the import location after they have been imported.

# Scanning Rights

Users require Scan rights to be able to use scan profiles for scanning documents. Additionally, scan profiles themselves can have rights applied to them, so not all scan profiles may be available to a user with Scan rights.

# Scan Profiles

Documents are scanned using scan profiles. The scan profiles are configured in Enterprise Manager by a FileDirector administrator. Scan profiles should be designed to provide the highest quality scan by setting the best scanner parameters for the documents to be scanned. In a scan profile a fixed document type can be assigned, and fields can be automatically filled with pre-set values.

Which scanner settings can be configured in the scan profile depends on the scanner and the driver used. Settings such as resolution, single or double-sided scanning and colour or black & white scanning are available. A scan profile can also be set to automatically scan a defined number of pages into one document.

A scan profile can also be configured to be linked to one fixed document type or the document type can be changed manually by the user.

*Notes*
*If you cannot see the Scan tab, you may not have the right to scan.*

## Change scanner settings

The scanner settings can temporarily be changed in the WinClient. For example the brightness setting can temporarily be adjusted to the quality of the documents to be scanned. The possible settings depend on the scanner driver used.

The configuration of the scanner driver is reset to its default settings using the ***Default*** button

## Set automatic value

When documents are scanned, an index field can be pre-set with a fixed value automatically. If multiple pages are scanned, each new document is pre-set with the relevant value.

When the scanner type is set to ***Directory Scan***, index fields can be set to parts of the file path, filename, extension, or the creation, modification or last accessed time.

For files which have the index data as the filename, the name can be split and imported. The precondition is to have field separators in the filename between the index data.

Example:

In the import path are tiff files with the following names:

0001_Schneider.tif
0002_Schmitz.tif

The underscore should be configured as the ***Additional path and filename separator***. The ***To value:*** field should be set to ***Part of filename***.

Value 1 is mapped to the field, which will be filled with the content 0001, e.g. customer number. Value 2 is mapped to the name field. The ***Index*** setting controls which part of the filename is used for each field.

When ***Part of path*** or ***Part of path and filename*** is used, the path will be taken into consideration. Each drive letter/storage location, folder and subfolder within the path should be counted as a Value setting.

When ***Numbered index (&I1….&I2…)*** setting is selected, the &Ix is used as the field separator.

*Note:*
*When using this setting, ensure that the pre-set fields are used in the relevant document type where scanning is carried out. It is recommended to either use a fixed document type or not to select* **Allow to change manually,** *or choose index fields which are used in all document types that are used for scanning.*

## Use OCR-/Forms recognition

This option can be switched on if OCR forms are created and configured within the scan profile. When documents are scanned using OCR recognition, the Component service and OCR engine must be installed on the workstation.

*Notes*
*It is important for the OCR recognition, that index fields can only be recognized properly if documents are scanned with the same resolution than the stored sample page on which the form was designed on. The resolution in a scan profile using forms recognition should be predefined and not changed by the user.*

## Document Type Selection

The scan profile can be configured to be used with a single Document Type, or any Document Type that a user has access to.

# Local Scan Profiles

If a workstation has a scanner attached to it, the WinClient can create a local temporary scan profile if the user has scan rights, but no pre-defined scan profiles exist for that user.

When the user selects the ***Scan*** tab in the Control Box, the WinClient will create a list of the pre-defined scan profiles available to the user. If none exist, the WinClient will look to see if any scanners are attached to the workstation. If there is a scanner, a temporary scan profile will be created. The settings available within ***Scanner setup*** will be dependent upon the installed scanner driver and the capabilities of the scanner.

Unlike the pre-defined scan profiles, which can be linked to forms recognition, and can have default field values assigned to them, the only settings available with the temporary scan profiles are settings that the scanner offers, such as resolutions, colour settings, and single or double-sided scanning. For certain scanners, an ***Extended*** tab may be shown within scanner setup, which has settings that are unique to the scanner attached, such as double-feed detection settings.

The WinClient will also create a temporary Directory scan profile to allow documents to be imported from workstation, or other location.

These scan profiles are temporary, and will not be saved between sessions.

# Scan Multipage documents

Using Batch Scan all pages in the feeder of a scanner are scanned and stored as one document in FileDirector. Exceptions to this can be that a set number of pages per document has been defined within the Scan Profile, and by using batch separation, defined within the OCR forms using Enterprise Manager.

To scan a multipage document:

1. Select the ***Scan*** tab in the control box of the Cabinet.
2. Select the relevant ***scan profile***.
3. Select a document type where the document can be stored. When the scan profile does not allow the settings to be changed, the document type is selected automatically.
4. Index information can be entered into the index fields before scanning. The scanned documents can also be indexed afterwards.
5. Select ***Batch Scan***

If the contents of the index fields currently displayed need to be emptied prior to the start of scanning select the ***Clear fields*** tool. A scan profile can also be designed to perform an automatic OCR/forms recognition on the document. In this case, indexing is performed automatically if forms recognition and the client are configured for this task.

# Scan Single Page Documents

All documents in the feeder of a scanner are scanned and each page is stored as a single page document in FileDirector.

In order to scan a single page:

1. Select ***Scan*** in the control box of the Cabinet.
2. Select the relevant ***Scan profile***.
3. Select a document type where the document can be stored. When the scan profile does not allow the settings to be changed, the document type is selected automatically.
4. Index information can be entered into the index fields before scanning. The scanned documents can also be indexed afterwards
5. Select ***Single Page scan***

Select ***Clear fields*** in the ***Scan*** toolbar, if you want to empty the content of the index fields currently displayed.

A scan profile can be designed to perform an automatic OCR/forms recognition on the whole document. In this case, indexing is performed automatically – if forms recognition and the client are configured for this task.

# Append pages

Pages can be appended to any document in FileDirector apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

If the document to which pages should be appended has the status ***Archived*** it will have the status of ***Checked out*** after scanning. The document is then displayed in the local document list. The scanned pages are appended to the end of the document.

To append pages to a document:

1. Select ***Scan*** in the control box of the Cabinet
2. Select the relevant ***Scan profile***.
3. Select the document to which pages should be appended.
4. Select ***Append Pages***.

# Insert pages

Pages can be inserted into any document in FileDirector apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

To insert pages into a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to insert and open it.

4. Select the page for inserting. The new pages will be inserted before the page selected.
5. Select ***Insert Pages***

# Prepend Pages

Pages can be prepended to any document in FileDirector apart from documents which have a status of ***Read only***. These documents are currently checked out for editing by another user.

To prepend pages into a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to insert to.
4. Select ***Prepend Pages***

The pages scanned will be added at the beginning of the document.

# Replace one page

Single pages within a document can be replaced.

To replace single pages in a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document into which you want to replace a page and open it
4. Select the page that you want to replace.
5. Select ***Replace one page***

# Replace all pages

All pages within a document can be replaced.

To replace all the pages in a document:

1. Select the ***Scan*** tab in the control box of the Cabinet
2. Select the relevant ***Scan profile***
3. Select the document you want to replace all pages for
4. Select ***Replace all pages***

# Stop scanning

Scanning can be stopped at any time by selecting ***Stop Scanning*** on the ***Scan*** toolbar

All new documents are created and stored in the local document list. In this list the document and its index can be edited if necessary. After checking in to the server, the documents can be retrieved.

# WinClient Start-up Options

When the WinClient is installed on a workstation a desktop shortcut is created for it. A menu is also created. This will start the WinClient with default settings. Additional shortcuts can be created, adding parameters to the start-up command.

## Scanstation

It may be that within an office, only one workstation has a scanner which is used by several users to perform their scanning. All the users may have been allocated a standard user licence, which does not have rights for scanning. By adding the ***/Scanstation*** switch to the WinClient start-up command, when the user logs in they will automatically be assigned a scan licence.

Create a shortcut for the WinClient and add the option to the end of the start-up command:

***C:\Program Files\Spielberg Solutions GmbH\FileDirector WinClient\ FileDirector WinClient.exe /Scanstation***

## Skipbarcodepage

This option will use any page with a barcode on it as a batch separator, but will not save the page.

Create a shortcut for the WinClient and add the option to the end of the start-up command:

***C:\Program Files\Spielberg Solutions GmbH\FileDirector WinClient\ FileDirector WinClient.exe /skipbarcodepage***

# Import Documents

From the WinClient documents and their associated index data can be imported. The index data for the documents is read from a text file

## Source Text File

The source import file is a text file that will contain the index data for a document and the name or names of the document files associated with the index data. Each documents index data and filename information is held on one line of the import text file. If the document files are held in a different location to the import text file, then the path for each document file must be specified in the import file.

When a text file is created, it must have field separators to allow FileDirector to determine the index data which is any valid character not used within any of the index data of document names. Each line must contain the same number of fields, irrespective of whether a there is no index data for that field.

```
123456,Bob Smith,image1.tif
234567,Tim Brown,image2.tif,image3.tif
345678,,C:\Import\Documents\image4.tif
```

In the example above, there are two fields, followed by the document file names. Within each line, the index and filename information is separated by a comma, although this can be any valid character not used in any of the index data or filename. Record 1 has one document associated with it, whereas record 2 has two documents associated with it, again separated by a comma.

Record 3 only has one piece of index data, but still retains the comma to signify the end of the index data field. The document file is not located in the same location as the import text file, and therefore the full path to the document is specified.

# Import Settings

To import the documents and index data select ***Impor***t from the ***File*** menu and the import window is displayed.

## Source File

Browse to the location of the import text file.

## Field Separator

Specify the character being used to separate the index data and document filenames within the import text file

## Number of Fields

Specify the number of index data fields contained within the import file.

## Left/Right Trim Chars

On occasions when the import file has been generated by a third party system, additional characters may have been added to the start and/or end of each index field, which should not be imported into the FileDirector index fields.

```
^123456^,^Bob Smith^,^image1.tif^
^234567^,^Tim Brown^,^image2.tif^,^image3.tif^
```

Using the ***Left Trim*** and ***Right Trim***, you can specify the number of characters to be removed, and not imported, from the start and/or end of each index field. In the example above, to remove the ^ character, set Left & Right Trim to 1

## Ignore Line Starting With

If the Import text file contains lines that should not be imported, such as comment lines, you can specify the character the lines begin with, and the import will ignore any lines starting with the specified character.

## Full Line is Filename

This option should be selected when the document file name contains the full index data, and is the only content of the import file.

```
123456_Bob Smith_image1.tif
234567_Tim Brown_image2.jpg
```

Using the example above, for each record there are two pieces of index data, separated by an underscore. The document filename is the complete line, including the index data.

### Import from All Directories

If there are directories below the one selected that also contain import text files with the same name as the one selected, this option will also process those text files as well.

### Bundle All Pages

With this option, all records in the import file with the same index data will be combined into one record within FileDirector.

123456_Bob Smith_image1.tif
123456_Bob Smith_image2.tif
234567_Tim Brown_image2.jpg

In the example above, the first two records will be combined into one record in FileDirector.

### Document Type

You can select the Document Type that the index data and documents are to be added to.

### Source Index – Target Field

After the number of index fields the import file contains has been specified, the Source Index column will list those fields, numbered 0,1,2 etc. The source index fields can then be associated with the fields of the Document Type that has been selected.

## Test Import

You can test the validity of the settings by using ***Test Import***. This will produce a *.testresult text file in the source location that will list any issues encountered, if any. This ensures that any issues can be corrected prior to importing the data and documents.

Test import only checks the import structure, not the complete document data to be imported.

# Start Import

Once the import has been configured and tested, select Start Import to process the import text file, and import the index data and documents.

The imported documents are created in the local document list and will need to be checked in.

When the import has finished, a message appears stating whether the import process was successful or not. If the import procedure was not successful, but has been executed, the index data may point to non-existing documents. Should this occur, check that the images are all located in the same path as the index file.

# Electronic Documents

Component Service, when installed on a workstation, allows the WinClient to interact with over 200 different electronic format documents (EDocs) such as Microsoft Word and Excel files, AutoCAD drawings, PDF files. The WinClient will be able to display and print the documents. A ***Send to FileDirector*** option will also be added to Windows Explorer to allow documents to be saved to FileDirector.

In addition, when Component Service is installed, if the option OfficeLink is selected, ***Save to FileDirector*** will be added to Microsoft Office applications.

## How EDocs are stored

Each electronic document, other than imported .TIFF and .JPG files are saved as a page of a FileDirector document, even if the file itself contains several pages. To view the pages, Component Service must be installed.

## How EDocs are Displayed

The Component Service contains viewer filters which allow the display of different file formats without the relevant application being installed on the workstation.

The viewer supports more than 200 different file formats including the most important propriety formats. Examples of these formats are Microsoft Word, Excel and PowerPoint files, Microsoft MSG Email files, Adobe Acrobat PDF files and AutoCAD drawings.

These formats can only be edited when the source application is installed

The viewer can display and print the electronic documents. It cannot recognize and display each and every format detail or special settings of the original file. Therefore the display of electronic documents in FileDirector can be different to the display of that document in the original application.

*Notes*
*Microsoft Office 97 format documents are no longer supported.*

# Navigating Through an EDoc

The document navigation and display tools available will be dependent upon the document being viewed. With the vast majority of documents, you can use the vertical and horizontal scroll bars of the document display window to navigate through the document. At the bottom of the vertical scroll bar, ***Next Page*** and ***Previous Page*** tools will be available. For some documents, these will be available to the left of the horizontal scroll bar. For some documents, such as an MS Excel document, that has multiple worksheets, the worksheet selection tools will be to the left of the horizontal scroll bar.

# Saving to FileDirector

Electronic documents can be saved to FileDirector in a number of ways. By right-clicking on a document, you can select the ***Send To...FileDirector*** option. Alternatively, documents can be dragged to the Cabinet Control Panel. The Index capture windows will then be displayed.

If the ***OfficeLink*** option was selected during the Component Service installation, MS Office documents can be sent to FileDirector from within the applications themselves. A Send to FileDirector tool is added to the Office applications toolbars. In Office 2010 for example, it is added to ***Add-Ins***, and can be added to the Quick Access toolbar.

Whichever method is used, the Index Capture window will be displayed, allowing the user to select which Cabinet and Document Type the document is to be saved to, and to add index data to be associated with the document. Once this is done, selecting Ok in the Index Capture windows will save the document to the Local Document list within the WinClient.

Documents can also be dragged and dropped to FileDirector. If more than one document has been selected and dragged to the WinClient, the user will be asked whether all the documents should be saved together. If the user answers Yes, The Index Capture window opens, and once the index data has been entered and the OK button pressed, all documents will be saved as a multi-page document in the WinClient. If the user answers No, each of the documents must be indexed separately, and will be saved as multiple single page documents.

# Add to Existing Document

From the Index Capture window, you can perform a search for an existing document and then choose to either append or prepend the document

If more than one document matched the search criteria used, the user can browse through the documents by using the ***Next Document*** and ***Previous Document*** tools to select the correct document to append or prepend the document to.

Additionally, if a value is entered into field that matches an existing document, and the field has been configured to only allow unique values, the document will be added to the existing document, being appended or prepended depending upon the field configuration.

# Revising a Document

For MS Office documents, if the original application is installed on the workstation, the document can be opened in the application by right-clicking in the display window and selecting ***Run Application***.

The document can then be revised and sent to FileDirector. The user will automatically be asked whether the document should be saved as a revision. If the user chooses not to save the document as a revision, the Index Capture window will open, to allow the user to index the document.

# Automatic Indexing

FileDirector index fields can be configured to be automatically filled with information from a document, such as the file name and its creation and modification date. When the Index Capture window opens, and the appropriate Document Type is chosen for the document, those values will be shown in the fields configured for that information.

For emails saved from MS Outlook, information such as Email from, Email to, Subject, Date Sent and Received can be automatically added to FileDirector index fields, if configured.

# Capturing Emails from Outlook

Emails can be sent to FileDirector from Microsoft Outlook, as for other Office applications, by using the Send to FileDirector tool.

# Email Attachments

FileDirector can be configured to separate attachments from the email, and either saves them as subsequent pages of the FileDirector document, of which the email itself will be the first page, or the attachments can be saved as totally separate documents.

For this to happen, keys need to be added to the Component Service configuration, which should be carried out by a FileDirector administrator. The file that needs to be edited is FileDirector Component Service.exe.config, held in the Component Service installation location.

## Attachments as Separate Pages

To save email attachment as separate pages, add the following key;

***<add key="EMailSplit" value="Off" />***

This value can set to the following values:

| | |
|---|---|
| Off | Emails are saved as complete *.msg file and attachments can be opened only when the email is opened in Outlook |
| On | The attachments of emails are saved as separate pages of the document and the body is saved as an html page |
| Ask | With this option the user is asked during saving whether the attachments are to be saved as separate pages or not |

*Notes*
*If there are pictures in html pages, they are also saved as separate pages in the document. The links in the html file cannot be displayed.*

## Attachments as Separate Documents

When the attachments are to be saved as separate documents the following option is set to ***TRUE***:

***<add key="NewDocsForAttachments" value="TRUE" />***

The default value after an installation is ***FALSE***, which means not activated.

# Sending Documents

Document can be sent by email, or can be sent to other users within FileDirector.

## Send documents by Email

The Email option of FileDirector allows sending of single or selected documents as well as single or selected pages of a document.

In order to use this feature you must have a valid Email account and a MAPI compatible Email client must be used on the workstation.

If the document to be sent only contains black/white images, a multipage TIFF file is created and appended to the email.

If the document contains several file formats, the TIFF files are bundled and appended as a Multipage TIFF file. Colour pages are appended as JPEG files, any other formats are directly appended to the Email in their original format.

### Attach as a PDF

With a setting in the WinClient, attachments to the email can be automatically converted to PDF format. This is set in ***Extras⇨Options⇨Misc***. The advantage of these settings is that the recipient of the Email only needs a free Acrobat viewer to read the document. It can also not be edited and a *.pdf file is normally smaller than the original, which is an advantage when sending via email.

### Configuration of Filename for Attachment

The file name of a TIFF file contains a time stamp, which is the creation date and time.

This file name is used when the user right clicks on a record on a document list on the tiny square used to select documents and if command Send to Email is used. The subject and the file name are named accordingly.

If the send command is used from the right-click menu when clicked on one of the index fields, the index information is used as the file name.

The file name can be set manually, if an option in the WinClient settings is configured. Open *Extras⇨Options⇨Misc*. The file name to be used can be configured to be made up of three parts and a field separator. The file name is assembled from these parts when Send to is used.

The relevant parts can be index information, a date field or the document type name. If a date field is used, one index field of the relevant document type must be configured to contain a date. If there are several date fields, the first date field is used.

> *Notes*
> *These settings may already be predefined in a client configuration in Enterprise Manager. In this case the user may not have the right to change this setting.*

## Sending a Single Document

Select the document to be sent in the document list.

Select ***Send to Email*** via the right-click menu.

The email Client will open a new message and attach the document to this new message. The recipient and a message will need to be added before sending.

## Sending Multiple Documents

Select the documents to be sent in the document list.

Select ***Send to Email*** via the right-click menu.

The email Client will open a new message and attach the documents to this new message. The recipient and a message will need to be added before sending.

## Sending One Page of a Document

Open the document and display the page to be sent.

Select ***Email*** by right-clicking in the display window, or on the thumbnail

The email Client will open a new message and attach the page to this new message. The recipient and a message will need to be added before sending.

## Sending Selected Pages of a Document

Select the pages to be sent from the thumbnails display of the document

Select ***Email*** by right-clicking on the thumbnails.

The email Client will open a new message and attach the pages to this new message. The recipient and a message will need to be added before sending.

# Send Email as Link

When a document is sent via ***email as Link***, links to the document will be created automatically in the clipboard for the WinClient, for the browser WinClient and for WebServer to call the document.

After a new email is opened, the clipboard can be copied to the email body.

The links are composed of the settings configured in ***Extras⇨Options⇨Misc***.

*Notes*
*When sending documents as a link, the recipient must be a FileDirector user, or anonymous access must be configured in WebServer for the recipient to be able to view the document*

# Send Documents to users

## The Inbox

Documents can be sent to other FileDirector users. The received documents appear in the Inbox of the user. When sending, a comment can be added as a note for the recipient, which is displayed when the document is opened.

## Sending Documents

Select the document or documents to be sent in the document list, right click and select ***Send to User***. The target user can then be selected. When sending, a comment can be added as a note for the recipient, which is displayed when the document is opened.

## Notification

Under *Extras ⇨ Options ⇨ Notification* a notification mode can be set, which will inform the user when new documents have been received in their Inbox.

# Ad Hoc Workflow

Using the Ad Hoc Workflow, users can create their own document processes and send documents to them. Users are limited to a maximum of 5 single step ad hoc workflows each.

## Create an Ad Hoc Workflow

From the ***Process Management*** toolbar, select ***Adhoc Workflow***. If there are no existing workflows, the ***workflow definition*** window will automatically open. The workflow name and step information can be entered.

If the user has existing workflows saved, the ***Create or edit adhoc workflows*** window will open. To create a new workflow, type the name it is to be given in the ***Name*** field, and then press the ***New*** button. The ***Workflow definition*** window will then open.

## Edit an Ad Hoc Workflow

From the ***Process Management*** toolbar, select ***Adhoc Workflow.*** The ***Create or edit adhoc workflows*** window will open, and will list the existing workflows.

From the list, highlight the workflow to be edited and press ***Edit***. The ***workflow definition*** window will then open, showing the workflow configuration.

Exiting workflows can be deleted from the list by selecting the workflow, and then pressing the ***Delete*** button

## Workflow Definition

Within the definition window the workflow name and the step information can be defined. If the definition window was opened from the ***Create or edit adhox workflows*** window, the Name field will be automatically filled with the Name entered there.

If there are no existing workflows, the default name of ***New adhoc workflow*** will be in the Name field. This can be overwritten with a meaningful name.

## Add user

To add a user to the workflow, click on the ***Plus*** button in the right of the window and select the user who is to perform an action from the drop down list. Only users who are in one the FileDirector groups, and have permissions to the Cabinet can be added. Several users can be added and the actions they have to perform defined.

Users can be deleted from the workflow by highlighting them in the list and pressing the ***Minus*** button

## Actions

For each user added to the workflow and action to be taken can be specified

### *View*

The user has to display the document and confirm the action.

### *Comment*

The user has to confirm the action by commenting.

### *Approve /Reject*

In the Windows Client two buttons will appear with the document in the Inbox which allow the document to be approved or rejected. A comment must be added to the document as part of the action.

## Email

If this option is set in the workflow, the user will automatically receive an email containing a link to the relevant document.

In order to send Emails, an SMTP server must be configured.

> *Notes*
> *The users email address must have been configured and stored within the user properties in Active Directory, or in Enterprise Manager for FileDirector sub-domain accounts.*

## Automatic Settings

For each workflow, three automatic settings are applied.

- Before a document is returned to the originating user, all the users defined within the workflow must have performed their action.
- If a user does not perform their action within seven days of receipt of the document, the defined action will automatically time out, and the document will be released to return to the originating user.
- After completion of the workflow, the document is always returned to the originating user.

# Process Management

FileDirector documents can be integrated into workflow processes using the process management option. With this module the path of a document through the steps of a defined process can be configured and then performed.

A process consists of several steps that are performed consecutively. Each process step can be individually configured to be worked on or whether an action is to be performed by one or more users. Defined tasks are specified for each user, for example approve, reject, comment or simply view (confirm notice).

If the task specified is carried out, the document is routed to the next step of the process depending on the structure of the process. Process management controls the path of a document through the process steps and keeps track of the status and location of a document.

## Send To Process

Processes must have been configured for a document to be added to one. Documents can be sent on a process manually or automatically.

### Manual Sending

To send documents manually to processes:

1. Select the document to be sent
2. Right-click and select ***Send to… ⇨ Process***.
3. Select the process to be used. Which process should be used must be checked with the administrator who configures the processes to company requirements.
4. Add a comment, if required
5. Press ***Ok***

### Automatic Sending

Documents can be automatically sent to a process depending on the configuration of the process. Automatic options include

- New documents added to a Document Type optionally depending upon index criteria set for the document
- Existing Documents within a Document Type, depending upon index criteria set for the document.

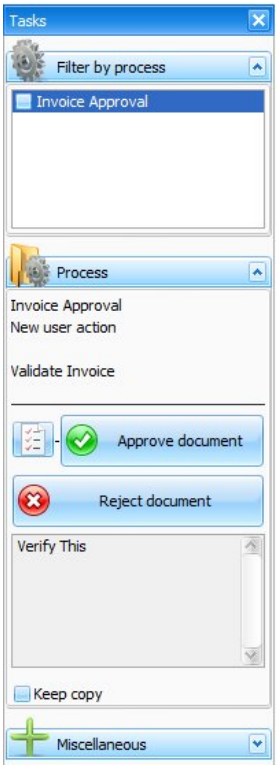
# Document Receipt

Each document received by a user from a process is listed in their Inbox. The action which the user must perform is displayed in the ***Action*** column of the Inbox. This includes documents received as part of a process and from ad hoc workflows.

When a document is opened, the following will happen:

When Layout Style 1 is being used, a button is displayed in the display window to perform the relevant action. The comments are also displayed which may already have been added by other users.


When Layout Style 2 or 3 is being used, a Tasks pane is opened on the right of the display window, which will allow the user to perform the relevant action. The comments are also displayed which may already have been added by other users.




Once the action required has been performed, the document is closed and sent back to process management control. Should it be necessary, a link to the document in your Inbox can be kept by selecting ***Keep local copy*** before performing the required action.

# Process actions

For each document received by a user, the configured action needs to be performed. The document will stay in the users Inbox until either the required action is performed or the time delay specified is reached. Process management then takes control of the document.

The following actions can be set:

## No action

Action ***None*** is used to send a document to a user during a process for information purposes. This action does not influence the process at all.

## Confirm view

If the action View is specified for a document, the user must confirm that they have viewed the document. The process management can then take the document to the next step in the process. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

## Comment

If a document step has the action Comment assigned, the user must view and add a comment regarding the document. Pressing the ***Comment*** button will open a windows showing all previous comments made, and will allow the user to add their own comments. The process management can then take the document to the next step in the process. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

## Approve Reject

If the action Approve/Reject is specified for a document, the user must read and then decide whether the document is approved or rejected. In both cases a comment can be added. The process management can then take the document to the next step in the process. Prior to confirming the action, the user can select ***Keep Document***. When this is selected, the document will remain in the users Inbox after the action has been performed.

The default action text for is ***Approve document*** and ***Reject document***. This can be user defined, and therefore the Approve/Reject actions may be differently named.

### Check user actions

User actions can be defined during the configuration of a process. A list of entries will be defined which must be completed before the user can confirm. This list can be configured to be user specific. If all the checks are not completed, the document will be rejected. Will not move to the next step of the process, and will remain in the users Inbox until all the checks have been completed.

The options that have been checked can be seen in the Comments of the document.

### Keep Document

If you decided to keep a copy of the processed document in your Inbox, this can be deleted at any time. This only removes the document from your Inbox, and does not affect the server copy. The document cannot be removed from the list if it is checked-out.

## Process Status

The current status of a document on a process can be displayed. For each document, the process name, the user where the document is currently located, the action which the user must perform, the name of the user who sent the document to the process, and the date and time when the document was sent to the process is displayed.

Any document in a process can be retrieved and commented upon from the process status. The process list can also be printed and, if necessary, the document can be cancelled from the process. From the ***Extras*** menu, select ***Process Status***

For a specific document, the same information and actions can be performed by right-clicking on the document, selecting ***Document Info***, and then selecting the ***Processes*** tab.

## Configure Absence

When using the process management, the documents are sent to users for processing. The user will see the document in their Inbox. When a user is away they can specify a period for an appointed assistant. The appointed assistant needs sufficient rights to edit the document and to deputize for the user adequately.

The settings can be applied by selecting ***Extras ⇨ Absence Settings***. This can also be done by a FileDirector administrator in Enterprise Manager.

# Sign Documents using a Signature Pad

A Process can be configured so that documents must be signed in order to approve them. A licence and specific hardware is required for this. FileDirector can use several different pads. The configuration of this is described in the *Signatures* section in the ***Options Settings*** chapter.

If a user has to sign a document, a window will open for the user to write their signature on the pad. This will then be compared with the sample signatures entered during the configuration, and if it matches, the signature will be accepted. If it is not accepted, the user must try again.

# Document Information

Every action that is performed on a document in FileDirector can be logged. A list of these actions can be displayed by an administrator user.

A description of the document information is given below, general information such as when the document was created, by which user, its size and the number of revisions can be viewed. The document history contains a list of retrieval activities and modifications. Other information about process activities and sending of documents is also stored and can be viewed.

To view information on a document, select the document in a document list, right-click and select ***Document Info***. A window which shows all information on the document is opened and is divided into four sections, selectable by choosing the appropriate tab.

Information on each page of a document can also be displayed by right-clicking on the page within the document window and selecting ***Info***.

## Document

This displays general information about the document

| Information | Description |
|---|---|
| ID | Unique number (ID) of the document |
| State | Actual status : Archived, Checked Out, Read only |
| Pages | Number of pages |
| Revisions | Number of revisions |
| Created on | Date of first storing in the Cabinet on the server |
| Created by | The user who created the document |
| Last modified on | Date the document was last modified |
| Last modified by | The user who last modified the document |
| Checked out on | Date/Time of Check out |
| Checked out by | The user who has the document checked-out |
| Size | Storage space used by the document |
| Certificates | Lists any certificates applied to the document |

# History

The document history contains a log, which lists who retrieved and changed the document.

| Information | Description |
|---|---|
| # | Number of the listed action |
| Action | Type of action: Created, Retrieved or Modified |
| Created on | Date and Time of action |
| Created by | User account involved |

# Processes

In Processes, all actions that have been performed on the document within a process are listed.

| Information | Description |
|---|---|
| Process | Process name |
| User | User account involved in this step |
| Action request | Action requested from user |
| Action response | Action taken by user |
| Action taken on | Date/Time of action taken |
| Comment | Comment added during execution |
| Signature | Signature used by user for action |
| Created by | User account involved when sending |
| Created on | Date/Time when document was sent |

The order in which columns are displayed can be changed by clicking on the column header, and dragging it to the required location. Similarly, columns can be removed from being displayed by dragging the column header towards the centre of the window, until a large ***X*** is displayed, and then releasing the left mouse button. The changes made will be saved. The original layout can be restored by right-clicking on any column header and selecting ***Restore layout***

# Sent-To

This tab displays a list of users which have received and sent the document.

| Information | Description |
|---|---|
| User | User account to which the document was sent |
| Comment | Comment added to the document |
| Created by | User account from which document was sent |
| Created on | Date/Time when document was sent |

# Page Information

This displays information about an individual page of a document. This does not apply to formats such as Acrobat and MS Office documents.

| Information | Description |
|---|---|
| Cabinet | Name of Cabinet that document is stored in |
| Document type | Name of Document Type which document is stored in |
| Document ID | Unique number (ID) of the document |
| File type | File type (TIFF, BMP or JPEG) |
| Width (Pixel) | Image width in Pixel |
| Height (Pixel) | Image height in Pixel |
| Resolution X (DPI) | Horizontal resolution |
| Resolution Y (DPI) | Vertical resolution |
| Colour depth (Bits) | Colour resolution in Bits |
| Uncompressed size | Size of uncompressed image |
| Compressed size | Size of compressed image |
| Compression rate | Compression rate in per cent |

# Options Settings

The WinClient can be configured to perform certain functions automatically, and you can configure how other functions are carried out. Settings can also be applied as to how the WinClient will look.

These settings can be stored for each user on the FileDirector server and be downloaded to the WinClient opened by the user on any workstation, so that their settings are constant.

To change these settings, select Options from the Extras menu. The various settings can then be configured within the tabs available.

## General Settings

### Open last used Cabinet

When selected, the last used Cabinet is automatically opened when the WinClient is started.

### Remove new documents after check-in

When selected, new documents will be automatically removed from the local list once they have been checked-in to the FileDirector server.

### Remove revised documents after check-in

When selected, revised documents are automatically removed from the local list once they have been checked-in to the FileDirector server.

### Remove local documents after sending to process

When using the process management the documents which are sent to a process are saved in the Inbox of the user. If a document is to be deleted after the user has performed their action, this option should be selected.

### Remove local documents after Undo check-out

With this option set, any documents in the local document list will be removed from the list if ***Undo Check***-out is selected.

## Don’t remove from search result list

After changing the index data of a document, it will be checked-in again and disappears from the search list. With this option set the document remains on the search list even if it does not match the search criteria after the index change.

## Auto Check-In new documents

When new documents are created, they are normally stored in the local document list on the workstation and have to be checked-in from this list. With this option new documents are immediately checked in.

## Auto Check-in External Documents

When set, this option will automatically check-in new documents being saved to FileDirector via the index capture window, such as when using the ***Send to FileDirector*** option in Windows Explorer.

## Auto. Check-in new documents after edit

With this option set, new documents are automatically checked in to the server only after the index data has been edited.

## Auto. Check-in revised documents after edit

With this option set, existing documents are automatically checked in to the server after the index data has been edited.

## Reminder to check in new documents on program exit

With this option set, the user is informed that new documents are still stored in the local list which have yet to be checked-in. This reminder appears when the user closes WinClient.

## Reminder to check in documents on program exit

With this option set, the user is informed that new or changed documents are still stored on the local list and have not yet been checked in. This reminder appears when the user closes WinClient.

## Verify integrity of unsigned documents

A check sum, a so called ***hash code*** is generated for each document. When document data is changed in the file directory of the server, the check sum will not match with the original data. A manual change of the data will be displayed with a red icon in the WinClient.

## Warning before a document with 0 pages is checked-in

With this option set, a user is asked whether a document with 0 pages should be checked in. This may happen after creating a linked document.

### Warning when a document with 0 pages is displayed

With this option, a warning is displayed when a document with 0 pages is selected for display.

### Warning when annotating or rotating causes check-out

With this option set a warning is displayed when an annotation is added to a checked-in document or an existing annotation is changed on a checked-in document.

### Language

The language used by the WinClient can be selected. By default the language of the operating system (Windows) is used, but it can be changed to one of the following languages:

English (UK)
English (US
Deutsch
Français
Português
Espaňol
Japanese
Chinese (Big5)
Chinese (Simplified)

If you switch to a different language, select a language from the drop down list and click OK. The WinClient will have to be restarted.

### Clear MRU List

With the MRU lists (most-recently-used) the search criteria are stored which have already been entered. This option deletes the MRU lists.

## Misc Settings

### Convert to PDF

With this option set, the documents which are to be attached to a new email (***Send to … Email***) are automatically converted to PDF and then attached.

*Notes*
*Electronic documents cannot be converted to PDF.*

### Attachment file name composition

The name given to any attachments can be defined within these settings. The separator is the character to be used between the single parts of the name.

## Reset Zoom when displaying new page

With this option set, the current zoom factor is not kept when a new document is selected to be displayed the display switches to a new page.

This option can be useful when indexing documents with the same layout. In this instance de-select the option.

## Use area post-indexing

If this option is set, the zoom parameter is saved for each index field individually. This allows for fast and easy manual indexing. If the field contents are always located at the same position on the document, the zoomed part always moves to the correct location.

## Image Enhancement

When set, this option turns on the WinClients image rendering, which enhances the display quality of images.

## Show post scan options

If this option is selected, a window appears after batch scanning, which allows the user to select the next actions

### *Save scanned pages*

The scanned pages are stored as one document.

### *Scan new batch*

After a scanning process has been terminated, a new document will be created when a new batch of pages is scanned.

### *Continue scanning*

Scanning can be continued and further pages can be appended to the current document when this option is selected.

### *Delete last page*

It may be that an index or separation pages are inserted between the documents. If this option is selected, the last page scanned is automatically deleted.

## Show line number in document lists

By selecting this option the line number will be shown at the beginning of each line in each document list.

## Alternate line colours in document lists

The background for each line in the document lists will alternate between two colours. The colours of the lines are set by the system.

### Show documents after single click

By selecting this option the document will be displayed after the first click on the document record in the document list and it is downloaded to the local cache. When this option is not selected the page will be shown and downloaded only after performing a double click.

### Allow floating control and list windows

Dynamic arrows showing possible positions appear during the positioning of control bays and lists via drag drop. This option can be set to provide this method of free positioning. When this option is disabled, control bays and document lists cannot be moved freely.

### Explorer like tree search

When ticked, a search is limited to only the currently selected node of the filing system. Sub nodes will not be included in the search.

### Immediate stamp embedding

When selected, stamps are immediately embedded as part of an image and cannot subsequently be changed.

### Custom quick start program

When Component Services are installed, an Office quick start toolbar is created in the WinClient. Office must be installed on the workstation. This quick start toolbar can be expanded by additional applications which can be available from the WinClient. The applications are added by Drag and Drop.

### Quick Start List

The Quick start list shows the links created for the quick start programs, and allows them to be deleted.

## Notification

### Disable client notification

Select this setting if the notification of new documents in the Inbox is not required.

> *Notes*
> *If the notification is switched on, the client will connect to the server in a fixed schedule. This may prevent the license used being freed again for another user*
> *The Inbox can be refreshed manually by pressing F5*

### Scheduler based passive notification

Select this option if you want to be notified when a new document is received in your Inbox

The interval, in minutes, must then be specified in which the WinClient should check for new documents in your Inbox. Select the types of notifications in Notification options.

#### *Display document list:*

When new documents arrive in personal folder the document list of the personal folder is displayed.

#### *Icon in task bar:*

A folder Icon appears as a notification for the arrival of new documents in your Inbox. The number of new document is displayed if you position the mouse cursor on the folder icon.

#### *Display message:*

A notification message window is opened, which informs you about the arrival of new documents in your Inbox.

#### *Play sound:*

A notification sound is played, which informs you about the arrival of new documents in your Inbox.

# Print

## Pagination

Choose whether you want a page number printed on the document or not.

#### *None*

No page number is printed on the document.

#### *Simple*

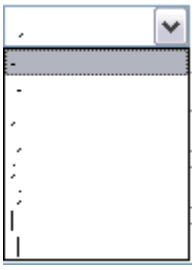
The page number is printed on the top right of the page.

#### *Extended*

The page number and the total number of pages will be printed on every document.

## Separator

The separator for the printed fields can be selected from the following pre-defined separators:



## Standard fields

Up to eight fields can be chosen, which will then be printed on the document.

These are:

None
Program
Version
Computer name
User
Date and Time
Clicked field
Date field
Document Type name

## Print hitlist row

When this option is ticked all fields in the document list row are printed as a header to the document. When unticked, no index field content is printed, unless the *Standard fields* index data printing has been configured, which is described above..

## Exact scale print

With this option set, documents are printed in their original size exactly as they were scanned. The image is not sized to the output format.

## Print using smart page rotation

As a document is printed the page format is set to the format of the printer and automatically rotated. This option can be used, if e.g. A3 and A4 documents are to be printed and must be rotated differently on several printers.

## Hitlist

When printing records from a document list the following can be set

### *Select fields before printing*

With this set, the index fields to be printed can be selected. When not set, all fields are printed.

### *Print Gridlines*

With this set, the document list is printed with borders and lines separating each line and column

# Layout

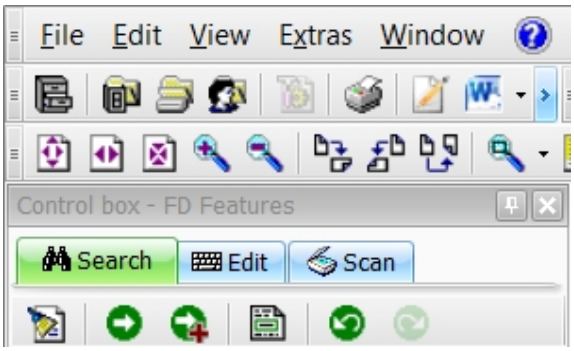
The Layout option allows you to configure how the WinClient will look, and what type of tool icons will be used.

## WinClient Layout

There are three styles available

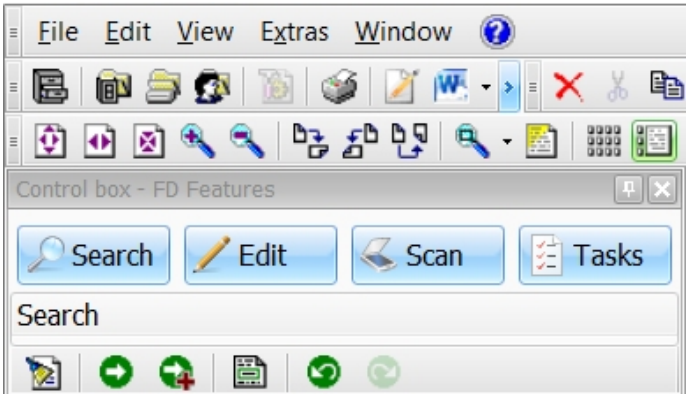
### *Style1*

This uses standard menus and icons for the toolbars and Cabinet Control Box



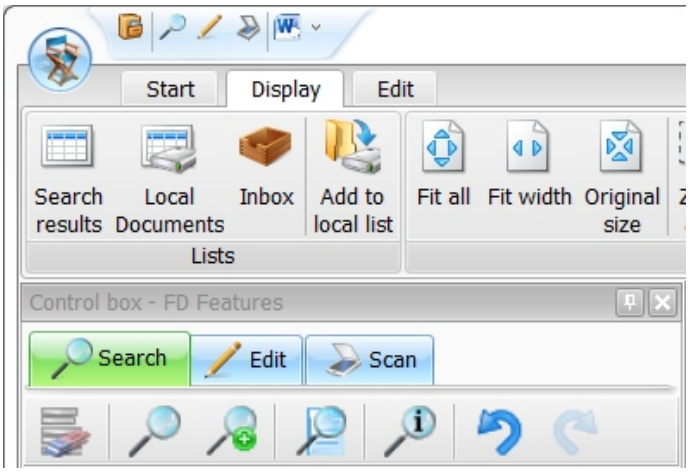

### *Style 2*

Style 2 uses the same icons and toolbars as Style 1, but the Cabinet Control Box uses buttons instead of tabs, and the process Management Tasks pane can be opened from the Control Box.



### *Style 3*

Style 3 does not have a menu bar and groups tools to 3 areas; Start, Display and Edit/ the tool icons are larger and where possible, will state their function. The Cabinet Control Box also uses different icons.




## Skin

The Skin option allows you to select the general colour scheme used by the WinClient. There are several options available

## Context menus

You can select whether the context menu's – those that are displayed when you right-click, use large or small tool icons.

## Full screen Lists

With this option you can determine the default views for the document lists and document display window. When selected, the document lists and display window are opened in full screen mode, with the lists and display window selectable by tabs.

## Document Viewer Reuse

Used in conjunction with the ***Full screen Lists*** setting, this will, when selected, open each document in the same document display window. When not set, a new tabbed document display window will be opened for each document viewed.

# Signatures

There are different ways in FileDirector that a document can be signed. You can use an electronic or a personal signature.

An electronic signature is used as proof of authenticity with a certificate when the documents are sent to the server. These documents cannot be manipulated, because the original documents are checked.

In comparison to that a personal signature is a way to sign a document as you would on paper.

## Digital

When a document type is configured only to accept signed documents, any user adding document to that document type will require a digital a certificate. This certificate must be provided to the user and can be loaded from the appropriate storage medium.

The following stores are selectable:

- Active Directory user store
- Current user store
- Smart card store

To obtain a certificate and to know from which server the certificate can be loaded, please ask the administrator or an official trust centre.

## Using a Signature Image File

Usually a document must be signed on the paper before it is scanned. With FileDirector you can place a scanned signature into the document after it has been scanned

To use this feature you must scan your signature and load it using the command ***Choose your signature image***. A password must be defined for the user to ensure that only the correct user has access to their signature. Every user can predefine three signatures, for example, a normal signature, initials and a legible signature. For all three signatures the password must be identical, as only one password is requested for the user who sets the signature as an annotation. If a password is already stored, the button with the number will change to bold.

When a signature is added to the document, it is embedded within the image. To add a signature to a document, use the ***Signature annotation***

To set a signature, the password must be entered.

## Configure Electronic Signature

You can add a signature using a Signature pad that can be used within the Process Management to authenticate process steps taken. For example, a process can be defined where a document is approved by using a signature. This step of the process is only complete if the signature is valid.

### *Select Pad Type*

FileDirector supports a variety of signature pads and Wintab, which is a link to many digitizers. Prior to selecting the pad, you must ensure that the pad is connected and that all drivers are correctly installed. Please refer to the manufacturer Installation guide for instructions on how to do this.

### *Setup Signatures*

The WinClient needs three stored samples of your signature for recognition. These must be stored by the user.

To add your signature, click on the Redo button next to the first signature box, and a window will be displayed where the signature written on the pad will be displayed. Once Ok is pressed, the second signature can be added, and then the third signature.

The signature can be tested by clicking on ***Test signature***. Upon entering your signature again, it will be compared with the three samples. If green buttons appear next to the sample boxes, the signature was recognized correctly.

If red buttons appear, the recognition did not work. If this is the case, the signatures may be too different and should be repeated

*Notes*
*The sensitivity for the signature recognition can be set in the web.config file of the FileDirector server. An administrator must modify this.*

***<add key="FDServer.SignatureThreshold" value="80" />***

*Please refer to the installation manual for further details on the settings of the configuration file.*

## Deleting Signatures

Signature configurations can be repeated at any time by redoing the sample signatures. A signature may only be deleted by a FileDirector administrator from within Enterprise Manager.

# Local Cache

For each WinClient user a separate cache is created on the workstation where local documents and copies of the documents recently displayed are stored. Each user can specify if the copies of the recently displayed documents are kept, when closing WinClient.

## Document storage cache (Cache Directory)

The storage location for the local cache is displayed. Normally the cache is located in a ***FileDirector*** folder within ***My Documents***.

The cache path setting can only be viewed here. The location is, by default, determined by Windows settings. This can be overridden by a server profile, which can be configured by a FileDirector administrator, and is described in the FileDirector Installation Guide.

## Purge Cache after program exit / logout

When this option is active, all copies of the recently displayed documents are deleted when the WinClient is closed or the user logs off. If the WinClient is left open for extended periods, after 12 hours the cache is automatically deleted to prevent large amounts of data being accumulated.

# Connection

The Connection tab determines which FileDirector servers the WinClient can connect to, and the basic login settings for each server. Multiple connections can be established to different servers, although a single connection to a FileDirector server is standard. Any connection setting changes will be applied to the WinClient when it is next started.

When installing the WinClient on a workstation from the FileDirector Server the connection is configured automatically. The settings are the sever address (URL), the connection mode and the language of the WinClient desktop and menus.

If the Connection window appears when starting WinClient, ask your system administrator for the address of the FileDirector server and enter the URL of the server. Once the connection settings are entered once they are stored in the local Cache of WinClient.

## Change Password

When using an account belonging to a FileDirector internal sub-domain, a user can change their password by clicking on the ***Change password*** icon on the ***Connection*** tab. The new password must be entered twice for verification.

Windows account users cannot change their password using this feature.

## Edit Connection

### *Server URL*

Selecting Edit Connections will display the connection configuration window. This setting holds the location of the FileDirector server.

The URL format is: ***http://server name/FDinstallation name***

Where:

***server name*** denotes the server name in the network that FileDirector is installed. This can be an n actual server name, an IP address, or a domain address, depending upon the server configuration.

***FDInstallation name*** is the name of the virtual directory of the FileDirector Server installation (default: = FileDirector).

### *Description*

A description can be applied to identify the server being connected to.

### *Automatically Log-In*

You can specify if you want to log in to the FileDirector using the current windows account or if you want to specify a user name and password each time the WinClient is started.

By default the login should be automatic, using the current Windows account. In this case each local cache is assigned to the relevant user and is only accessible to that user. Which setting should be used in your environment is specific to the environment requirements and must be configured by an administrator.

To change this setting click ***Automatically log-in using current windows account*** in order to switch this setting on or off.

When the setting is turned off and more than one FileDirector server connection is set-up, the Log-in window shows a drop down menu to select the server you want to connect to including the description of the connection.

### *Setup Image*

An image can be displayed to visually mark the connections. This can help with identification, especially when dealing with multiple connections. The image has to be a bmp file.

## Test Connection

The connection settings can be tested by selecting Test Connection. If the connection was successful, a success message will be displayed.

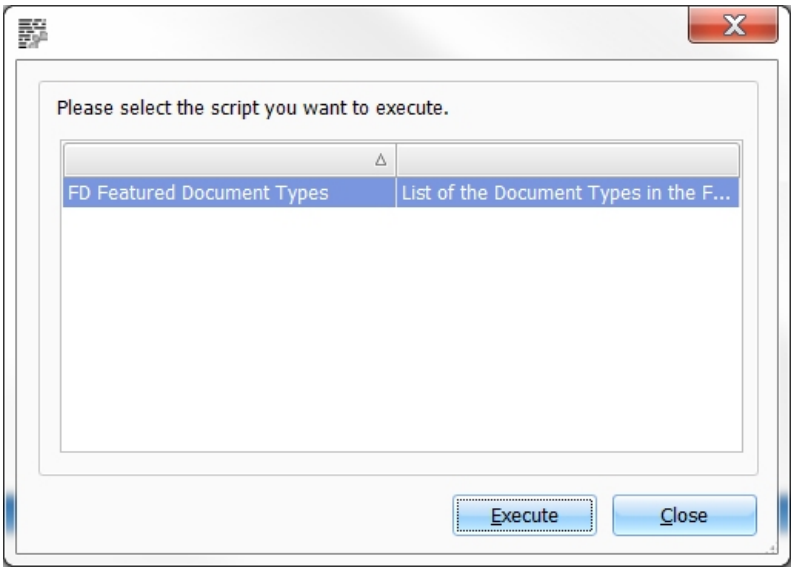
# Reports & Scripts

Scripts configured by a FileDirector administrator within Enterprise Manager enable a user to run data queries on FileDirector without any knowledge of or access to SQL server.

The scripts can contain parameters that have to be set by the user.

## Using scripts

Select ***Reports & Scripts*** to list the available scripts. Only those scripts that a user has rights to will be listed. The example below shows one script, which will list the Document Types of the FD Features Cabinet.



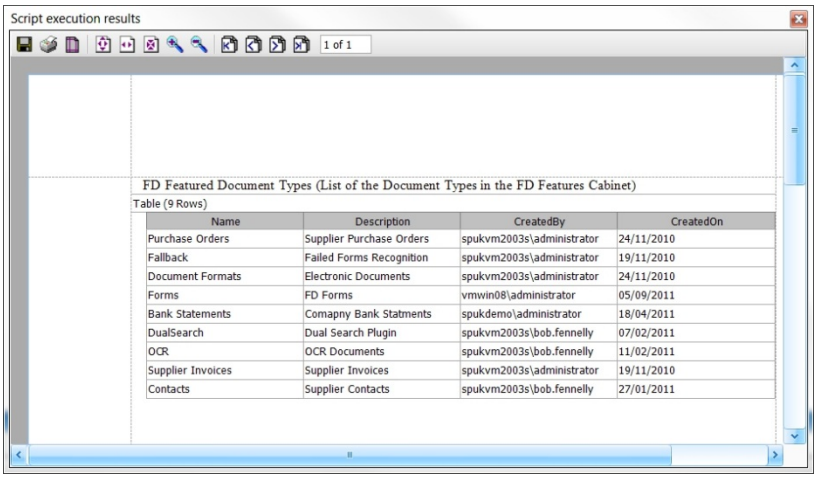

To run the script, choose it from the list and select ***Execute***. If the script needs manually entered parameters a window opens where the parameters must be entered. The window ***Script execution results*** will then open.

# Script Results

The script results window will display the information returned by the script query, in tabular format. The report can be paged through if necessary and different zoom levels can be selected.

The report can be printed, or can be saved in the following formats: PDF, XLS, RTF and CSV.

The example below lists the Document Types from the FD Features Cabinet




| Name | Description | CreatedBy | CreatedOn |
|---|---|---|---|
| Purchase Orders | Supplier Purchase Orders | spukvm2003s\administrator | 24/11/2010 |
| Fallback | Failed Forms Recognition | spukvm2003s\administrator | 19/11/2010 |
| Document Formats | Electronic Documents | spukvm2003s\administrator | 24/11/2010 |
| Forms | FD Forms | vmwin08\administrator | 05/09/2011 |
| Bank Statements | Comapny Bank Statments | spukdemo\administrator | 18/04/2011 |
| DualSearch | Dual Search Plugin | spukvm2003s\bob.fennelly | 07/02/2011 |
| OCR | OCR Documents | spukvm2003s\bob.fennelly | 11/02/2011 |
| Supplier Invoices | Supplier Invoices | spukvm2003s\administrator | 19/11/2010 |
| Contacts | Supplier Contacts | spukvm2003s\bob.fennelly | 27/01/2011 |

# Template Tasks

The Tasks feature allows HTML form templates to be opened and the fields filled from within the WinClient. The fields within the template can be linked to FileDirector index fields so that when the form is saved, the index fields are automatically filled.

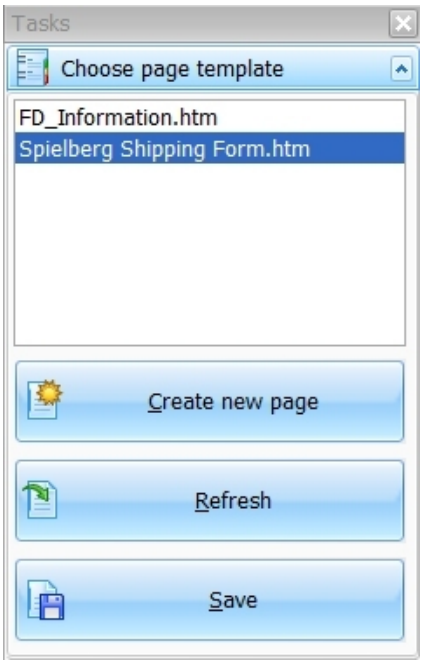
This can be a very useful feature for completing forms that are to be sent to customers or suppliers as well as being stored in FileDirector, as the whole process can be completed within the WinClient.

## Providing templates

The templates shown in ***Tasks*** are configured in Enterprise Manager through the ***Overlays*** in a Cabinet.

## Using templates

After selecting ***Create page from template*** in the WinClient the Template Tasks pane will open on the right side of the WinClient.




The templates available will be listed.

## Create new page

Highlight the template you want you use, and select Create new page. The template will be opened in the display window. And the fields contained within the template can be completed.

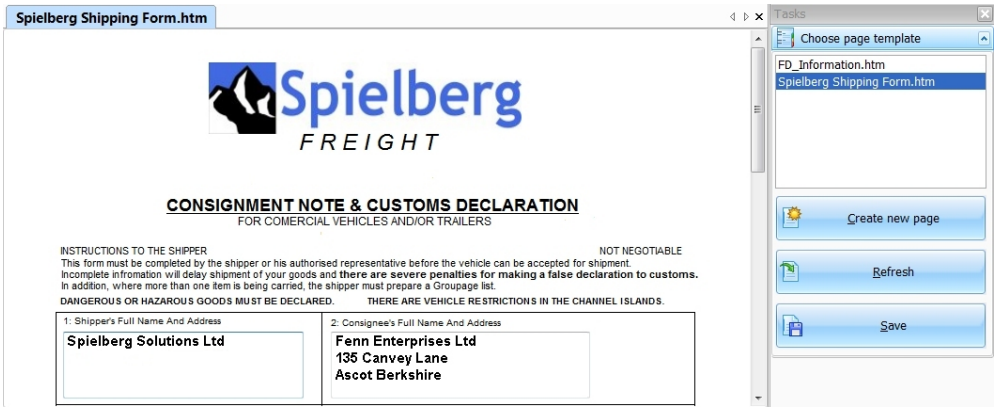
## Refresh

Refreshes the fields connected in the HTML-template.

## Save

This will Save the HTML-template, fill the Document Type index fields from the fields on the template, and place the document in the Local documents list. Depending upon the setting applied to the template, it may be converted to an image, or stay in HTML format.

An example template is shown below.



# WinClient Plug-Ins

Plug-ins are additional functions which can be added to the WinClient to perform specific functions that are not part of the standard WinClient, and that are not required by every installation, or workstation within an installation. Customized functions can also be developed to make the system more versatile for specific business requirements.

## Installation of Plug-ins

The plug-ins are located on the FileDirector installation CD in the directory plug-ins. To install these files have to be copied into the plug-ins directory of the WinClient application directory:

***C:\Program files\Spielberg Solutions GmbH\FileDirector WinClient\PlugIns***

### Enable Plug-Ins Menu

To use the plug-ins after installation, the buttons need to be added to the menu. This can be done with the customization menu. If the user does not have rights to change the menu‘s the administrator must activate the plug-ins with the Client Configuration in Enterprise Manager.

### Requirements for OCR Plug-in

Since this plug-in performs OCR recognition, Component services and the OCR engine must be installed on the server. Note that for OCR a licence is required, this function is only available if the workstation is connected to the server

# OCR Index

With OCR Index plug-in it is possible to draw a zone on a displayed page and directly move the recognized information to an index field independently of any forms recognition that may be configured. This function can also be used for scanned pages which are not suited for automatic OCR indexing

## Perform OCR zone recognition

To draw and OCR a zone on a displayed page, and place the text in an index field, follow the steps below

1. Select the document to be indexed and display it.
2. Select the Edit tab in the Control Box
3. Select the index field to be filled
4. Select the OCR Index plug-in button
5. Drag a zone around the information to be read.

# Dual Search

The ***Dual Search*** plug-in gives the WinClient user the option to retrieve all documents with a field with the same value, by entering a known unique value of another field.

For example, the user knows the invoice number for a specific customer but needs all documents for this customer. Using this plug-in, the user can search for the invoice number and the WinClient shows all documents which contains the same customer number as the one with the invoice number entered above.

The configuration of Dual Search is done through the xml file of the plug-in. The default path for the xml file is:

***C:\Program Files\Spielberg Solutions GmbH\FileDirector WinClient\PlugIns\DualSearch***

## XML File Contents:

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration>
 <Settings key="Title" value="Perform Dual Search" />
 <Settings key="UniqueFieldID" value="E8AB566D" />
 <Settings key="GroupingFieldID" value="F0FCEF9F" />
 <Settings key="ShowDocument" value="True" />
</Configuration>
```

### *Title*

Contains the name of the plug-in.

### *UniqueFieldID*

The ID of the appropriate field is entered. This could be the invoice number.

### *GroupingFieldID*

The ID of the field containing the common value for the documents is entered; this could be the customer number.

### *ShowDocument*

This determines whether the document is retrieved and displayed.

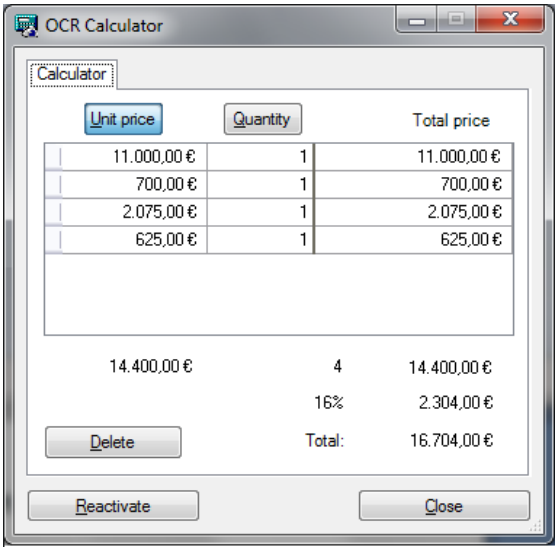
*Notes*
*The ID of a field is shown in the properties window of a field in Enterprise Manager.*

# OCR-Calculator

The OCR Calculator can add units and prices. If this information is listed on an invoice, the information can be read by OCR and listed in a calculation table.

## Adding of units and prices

For the OCR calculator, scanned documents which list units and prices in columns are required. Select the document to be read and display it. Select the OCR Calculator plug-in and drag a zone around the listed units and prices. A window appears where the units and prices are listed in a grid. The entries can be modified for a quick calculation.



# CallTo – Reading Phone Numbers

The Call To plug-in also works with OCR recognition functionalities. This plug-in reads telephone numbers from a document and filters the reading result in order to obtain a valid telephone number.

The filtered telephone number does not contain hyphens or other formatting characters, so that this number can automatically be passed to a defined application using the ***callto:// *** - windows function.

## Default Country Code Setting

The default country code needs to be set within the XML file of the call To plug-in. This is found in the CallTo plug-in directory.

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
 <appSettings>
        <add key="CountryPrefix" value="+44" />
 </appSettings>
</configuration>
```

If a standard country code is assigned during recognition, this can be specified in the XML file of this plug-in. If **+** or ***00*** is recognized at the beginning of the number, the default country code is not used.

# HitListDocumentExport

This plug-in can be used to export documents, with their index information. It creates an export file from the selected documents, which can be imported by the WinClient or other third-party applications.

Select the documents to be exported, and then select the plug-in. A field separator must be defined which is used within the export file. Select ***Export*** and then select the target folder for the documents to be exported to.

A subfolder named with the Cabinet ID is created in the selected folder. The documents are written as subfolders named using the document ID. An index file with suffix .dat is also created, which contains the index data listed with the relevant TIFF files:

> *Notes*
> *This plug-in exports the newest version of a document without revisions and annotations.*

# Global Count

The ***Global count*** plug-in is a counter that can be applied manually to a defined field. The setting is saved in the on the FileDirector Server, so all users can apply the counter.

The location of the setting is in the ***FDConfig*** database, ***Settings*** table. If a record does not exist, it can be created. ***GlobalCountPlugin*** should be added to the ***FD_Key*** column. By default, the start value will be ***0***, but this can be changed to suit the application.

The field the count is applied to must be defined in the XML file of the plug-in.

```
  <?xml version="1.0" encoding="utf-8" ?>
- <Configuration>
    <IndexField ID="BA558B9F" />
  </Configuration>
```

The value of the database counts up to 1. The field can also contain alphanumeric and corresponding values count up as follows ‘abx’ -> ‘aby’ -> ‘abz’ -> ‘aca’ …

If no value is found in the database (first use) ‘0’ will be set. The value can be changed in the database with the SQL Enterprise Manager.

> *Notes*
> *This counter doesn’t need a field with the property* **increment (global),** *because this is an automatic server function.*

## Usage in WinClient

Each time the ***GlobalCount*** tool is selected, the associated field is filled with the count value, and the count value is then incremented.

When multiple document are to have the same counter value, close the window of the current document and mark several documents. Select Global Count and all the selected documents will have the value applied to them.

# ResponseWriter

Response Writer is used to assist in creating word documents with prefilled fields taken from FileDirector.

As an example, you may wish to query an invoice received from a supplier. By using ResponseWriter, the supplier name, address and invoice information can be added to a word document, via a word template that has the fields specified that ResponseWriter will link to.

## Example

In this example, one document type is used to hold supplier Invoices, and the second document type holds records containing supplier names and addresses. A common (connection) field between the two document types is ***SupplierID***.

Document Type One - Invoices
***SupplierID***, Invoice number, Date …etc.
Document Type two – Supplier Information
***SupplierID***, Address, Name, Email, Phone, Street…etc.

A letter needs to be generated regarding an invoice received from a supplier. By selecting the invoice in the first document type and selecting the Response Writer plug-in, the invoice and address details can be passed to Microsoft Word, by using a defined Word template.

## Installation

Copy the plug-in to the WinClient plug-ins folder. The folder will contain the XML-file DSDMS FileDirector ResponseWriter.xml which must be edited for the correct configuration.

## Configuration

You will need the Cabinet ID, Document Type ID of the second Document Type – the one that has address information. Also, the field ID of the connection field – SupplierID, and the ID's of the fields from both document types you want to insert into the correspondence.

Open the configuration file ***DSDMS FileDirector ResponseWriter.xml*** and fill in the appropriate values:

```
<?xml version="1.0" encoding="utf-8"?>
    <Configuration>
    <Cabinet ID="055CF7ED">
            <Settings key="ConnFieldID" value="1E074F71" />
            <Settings key="DetailsDocType" value="2C2B91E8" />
            <Settings key="TemplatePath" value="D:\Templates\EDocs\" />
            <ShowDetailColumns FieldID="90511262" />
            <ShowDetailColumns FieldID="1E074F71" />
            <Mapping FieldID="90511262" Name="«°First name°»" />
            <Mapping FieldID="1E074F71" Name="«°Name°»" />
            <Mapping FieldID="E4A1A0A2" Name="«°Address°»" />
            <Mapping FieldID="2B11B6E4" Name="«°Postcode°»" />
            <Mapping FieldID="E13A67C0" Name="«°City°»" />
            <Mapping FieldID="458C3749" Name="«°Supplier No.°»" />
            <Mapping FieldID="CCA3175B" Name="«°Invoice No.°»" />
    </Cabinet>
    </Configuration>
```

The following <tags> must be filled in the file:

| | |
|---|---|
| Cabinet ID | The unique ID of the Cabinet |
| ConnFieldID | Connection field between document types |
| DetailsDocType | Document type of the address data (details) |
| TemplatePath | Path for the templates |
| ShowDetailColumns | Fields for the listed contact persons<br>Select details if several entries are available for one Supplier ID<br><Mapping FieldID="90511262" Name="«°First name°»" /> |

The mapping fields are fields whose contents are filled into the correspondence, extracted from the document type. Either fill in the ID in this way [FD_3795A51F] or the definition which has been set as the name of the field: «°First name°».

The address field of a word-file which is to be filled in with the defined fields can look like this, for example (Name: InvoiceQuery.doc):

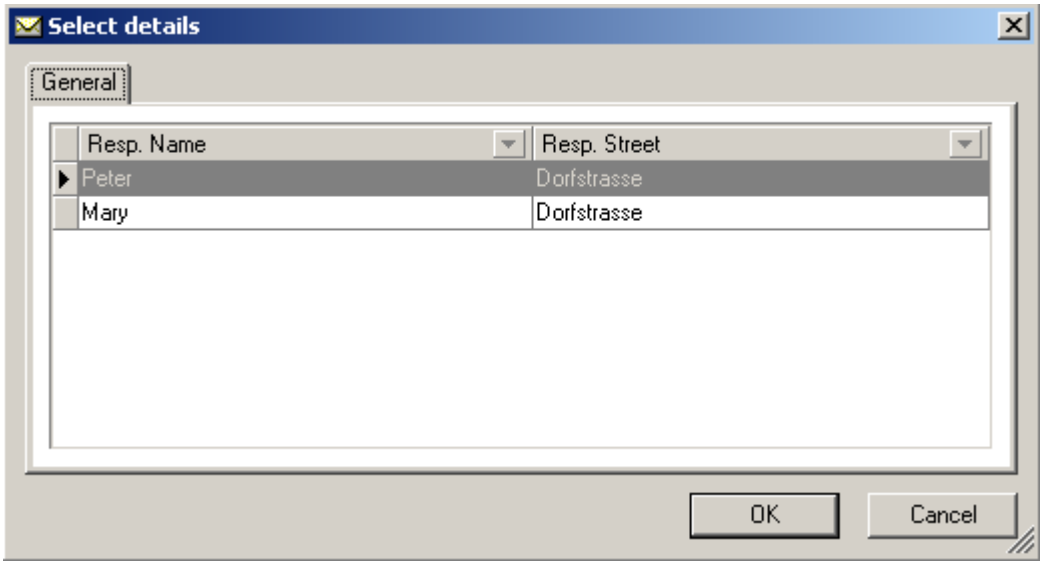
```
[FD_90511262] [FD_1E074F71]
[FD_ E4A1A0A2]
[FD_2B11B6E4] [FD_ E13A67C0]


Your invoice:          «°Invoice number°»


Dear Sir or Madam,
```

## Using ResponseWriter

Select an invoice in the document list and then select the ResponseWriter plug-in.




The example given has two contact entries for supplier number 1111. The correct contact can be selected. You can then choose the Microsoft Word template to be used, which will open a new Word document, and fill the fields configured within the XML file.

# Retrieval Media

Documents, with their associated index data can be exported from FileDirector to other media, together with a Retrieval application that allows the documents to be displayed, along with their index data. This data can be viewed for retrieval without using a FileDirector Server. The special retrieval client is available for this. This is a very easy way to provide data for retrieval from a FileDirector Server to somebody who has no access to a FileDirector infrastructure.

## Requirements

A Retrieval ticker is required to create a retrieval CD or DVD. These tickers can be purchased in blocks and they are stored in the FileDirector program licence. Any number of documents can be exported and added to an assembly of data. If the required data has all been collected, this collection must be licenced with a ticker. Only when this ticker licencing has been performed, can the data be processed by the retrieval software.

A licenced CD or DVD can be copied without limitation or without requiring new tickers. If data is amended within an existing licenced collection, a new ticker is required.

If a collection of documents needs more space than is available on the relevant disk (CD or DVD), the data is divided into several directories. These directories can be opened by the retrieval client as separate Cabinets. For each directory a ticker is required.

*Notes*
*In order to purchase tickers please contact your FileDirector reseller.*

# Create a Retrieval CD/DVD

If you want to export documents to retrieval media, select the documents to be exported and choose ***File ⇨ Export ⇨ Retrieval CD/DVD***.

If documents from different document types should be exported, they can be assembled step by step without having to licence it after exporting. It is possible to create a document list containing more documents than the currently set maximum number of displayed documents.

A number of documents can be added to an exported Cabinet at any time. If the exported Cabinet is already licenced with a ticker, a new ticker will be required. When it has not been licenced by a ticker yet, any number of documents can be added and a ticker is needed for licencing only on completion.

> *Notes*
> *The maximum number of documents that can be displayed on a document list is set on the server. An administrator can specify the maximum number of documents to be listed on a document list.*

Once the documents to be exported have been selected, select ***File ⇨ Export ⇨ Retrieval CD/DVD***, and the ***Export to CD/DVD*** window will open.

## Target Folder

The exported data is stored in the target folder. A subfolder with the Cabinet ID as the name is created. A file CABINETS.XML is created, which is used by the retrieval client. A licence file and other XML files are created, that describe the contents of the Cabinet.

## Include revisions / history

If revisions should be exported, this option can be selected. Please note that the user exporting the data will need rights too display revisions, otherwise the data cannot be exported correctly.

> *Notes*
> *The export of full text is not supported.*

## Include fulltext

Any information generated as a result of full text OCR being performed on the documents can be included in the export, and subsequently used for document searches within the Retrieval software

## New target folder after:

The size of the target directory is specified. The size of the XML files is taken into account during calculation of the estimated necessary size.

Please note to reserve some space on the export disc, if the retrieval client software is also to be copied to the media.

### General information

The company name and the name of the user exporting the data can be set.

### Certificate

When using a certificate the export can be performed with an electronic signature.

In order to use this feature, certificate services must be available in the domain (Public Key Infrastructure - PKI). A signature ensures that the exported data is created from a trusted source.

### Media ID

Each new retrieval media carries a unique number, the media ID. Using this, a disc can be identified as the original one. The previous, actual and next media ID can be specified here.

### Licence Retrieval

This option puts a licence file to the exported Cabinet data. If the exported data collection is bigger than the space specified, a new subdirectory is created with a new Cabinet directory. For each directory a ticker is used for licensing.

### Start

FileDirector does not contain or control CD/DVD software, the exported data cannot be written directly to CD/DVD. Data is always written to an export path, which should not exceed the space available on the media to be written. The exported data must be licensed; this collection of data can then be written to CD/DVD.

## Retrieval Client

The FileDirector Retrieval Client is necessary to retrieve the data from a disc. This retrieval client must be available for anyone who needs to use this disc. The retrieval client can either be written to the disc itself or be sent to the users by other means.

### Installation

On the FileDirector installation CD the retrieval client can be found in the folder ***\Setups FileDirector Retrieval Setup.msi***.

For installation, log on to the system as an administrator user and execute the *.msi –File. Follow the installation instructions displayed on the screen.

After installation is complete a FileDirector Retrieval icon can be found on the desktop. Double clicking this icon will start the retrieval client.

***Notes***

***FileDirector Retrieval Client can also be installed on a computer with FileDirector WinClient installed.***

## Open Cabinet with Retrieval Client

After the retrieval client is started, a window for opening of a Cabinet appears. Open the Cabinets.xml, which was created during the export. An exported Cabinet can only be opened by the retrieval client if it licenced.

FileDirector retrieval client generally is comparable with a limited WinClient, i.e. it has less functions. Descriptions about the functionalities can be taken from the WinClient documentation.

# Local Cache

All new scanned, checked out, downloaded and viewed documents are automatically stored in the local cache.

Only the actual displayed pages of a document will be downloaded, so that the time to load is much shorter when working with large documents. When you need to work with documents in off-line mode, the complete document should be downloaded.

*Notes*
*The local cache is automatically created; no manual or other changes should be made.*

## Storage location

By default, the local cache will be located in the folder FileDirector, which is created in the users My Documents folder The administrator can move this folder to another folder if required.

## Structure of the local cache

In the FileDirector folder, for every logged-in user, the WinClient settings are written to a folder. Within this folder, Cabinet folders with the ID of the Cabinet will be created for every opened Cabinet. The file docmanager.xml contains a list of the documents.

The documents are saved in subfolders, which contains the revisions and pages.

## Cache is deleted automatically

The setting Purge cache on program exit/log-out, when set will remove any documents which have been viewed, but do not currently appear on the document lists. All local and checked-out documents are not purged. The setting is located in Extras⇨ Options ⇨ Cache

If the cache directory is deleted, when the WinClient next starts, it will be automatically recreated. It may however have lost the connection settings to the FileDirector server, so this would have to be reapplied.

# General Information

## Document Formats

### Stellent Viewer

When Component Service is installed, the, Stellent Viewer is installed to enable FileDirector to display different document formats without the need for the corresponding application to be installed.

For information on the formats supported, please refer to the Oracle homepage.

When using formats that are not supported by the Stellent Viewer or you have trouble displaying these files via the WinClient, the Stellent Viewer can be switched off for these formats.

### WinClient Settings

The Stellent Viewer can be disabled for specific document formats, if, for example you wish to utilise the native application to view the document.

To apply this setting to a single client, add an entry to the configuration file ***app.xml*** in the WinClient program folder

The file is stored in the program path of WinClient. ***C:\Program Files\Spielberg Solutions GmbH\FileDirector WinClient***.

In this file app.xml find the following entry:

```
<appSettings>
<add key="NoStellentFor" value=".xml;.htm;.html;.mht" />
</appSettings>
```

Add the formats that are not to be used by the Stellent Viewer.

*Notes*
*Bear in mind that this setting can be overwritten when the WinClient is updated. If this setting is to be permanent, the setting should be added to the app.xml on the server prior to installation*

# Keyboard Shortcuts

All the WinClient commands can be carried out using the mouse or touchpad. There are also many keyboard shortcuts available that you can use to control the WinClient. These are listed below.

| Key | Function |
|---|---|
| F6 | Control box Search |
| F7 | Control box Edit |
| F8 | Control box Scan |
| Ctrl + F6 | Search results |
| Ctrl + F7 | Local Documents |
| Ctrl + F8 | Personal folder |
| F5 | Refresh |
| Alt ⇩ in index field of control box using a keyword list | Drop down of a keyword list |
| Alt ⇩ in index field of control box using normal field | Drop down of a list of recently used entries (MRU) |
| ⇩ scrolling through last entries made | |
| Current tab Edit, First entry in list is selected, storing of changes of return in last index field | In last index field focus jumps to button „Save changes and move to next document → pressing Return again executes this button |
| Perform search (Strg +S) | The search is executed using the index currently entered. |
| Ctrl + A | Select all |
| Ctrl + T | Toggle select |
| Ctrl + R | Remove selection |
| F12 | Toggle to full screen mode |

# Help menu

## WinClient Help

The Help/Contents option of the Help menu will display the WinClient User Guide. This is a PDF so an appropriate reader such as Adobe Acrobat Reader will need to be installed on the workstation.

## Repair Local Cache

If an issue has occurred with the local cache, selecting this option will start the cache repair. When the WinClient starts, if a problem is found with the local cache, you will be prompted to run the cache repair.

## About

This will display the version number of the WinClient. Also displayed is the FileDirector Server type and version, the number of tickers for Retrieval CD/DVD's available, and the version information for the following, if currently installed on the workstation:

Component Service
EDOC engine
OCR engine

The time, in days, until the expiry of the FileDirector software Assurance is also displayed