Spielberg Solutions GmbH

FileDirector

Enterprise & SBE

WinClient – User Guide

Version 3.2

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Welcome to FileDirector

The Windows Client (WinClient) is the primary FileDirector application for working with documents held or to be held in FileDirector Cabinets. Using the WinClient, standard tasks such as document scanning, import, 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 created in an organisation; a user is only allowed to work with those Cabinets to which they have been granted access.

Each Cabinet can contain several document types and Index fields are assigned to the document types, which can then be completed according to the filing requirements of the documents. The retrieval information is entered into the index field. Documents are stored with this index data for easy retrieval.

Although a user may have access to a Cabinet, they are only able to work with those document types in a Cabinet to which they have been 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 second document type.

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

Electronic documents (EDOCS) are stored in original format and can be viewed by an inbuilt viewer even if the associated application is not installed. If the associated application is installed (for example Word) documents can also be edited. Changes are stored in regular document types as revisions, with the original version of the document also remaining stored.

Connection to the Server

When starting the WinClient, the FileDirector server address may have to be entered to allow the WinClient to connect to the server. This will normally happen only when the WinClient has been installed in a method other than those recommended. Please check with the 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 may be associated with a proxy server.

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

Online/Offline

The WinClient is installed on to a workstation and 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 in 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 not established. 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 logon 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 such as search, check in, etc.

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

Work offline with local documents

When retrieving documents from the server, not all pages of a document are automatically downloaded to the local cache, so as to improve performance. Initially, the first page is downloaded to the local cache and then each page that is viewed. If you want to work offline with a document, 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 ***ready*** symbol in the bottom left 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 confirm with ***Yes***, you can work offline with these documents.

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 performed, for example; retrieve documents from the server or send documents to the server.

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

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.

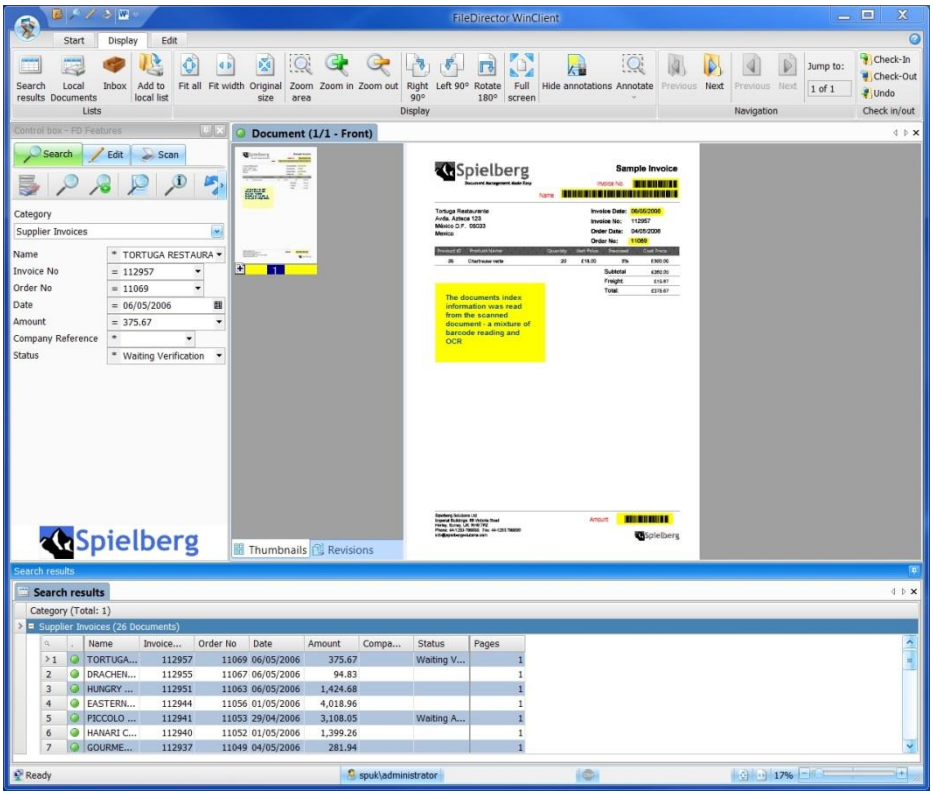
Only as many users can connect to the FileDirector Server and logon as licences are available. After 30 minutes of idle time (this is a default value and can be changed), the WinClient will automatically log off and free the licence for another user. The number of licences can be displayed in the WinClient 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 then only be possible once another user has logged off.

Notes
The **Scheduler based passive notification** *setting can be selected in the WinClient* **Notification** *options. This setting can result in the licence not being freed by the server because the WinClient will establish a connection at the specified interval – even when the user is not using the opened WinClient. This only applies when the WinClient is open.*

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

When opened, the WinClient commands and options are available from the displayed toolbars. Once a Cabinet is opened, the ***Cabinet Control Panel*** is displayed. When a search is performed, the results are displayed in the ***Search Results*** list. When 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 tools within each tab will change depending on the tab selected and provide the appropriate commands for that tab.

Document lists

Document lists are displayed in separate tabs. Three different document lists are available:

Search results

The Search results list shows the documents found on the server as a result of a a search operation. In order to perform a search, the WinClient must be in online mode.

Local documents

The Local documents list shows documents stored on your local workstation, 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. In addition, documents that have been viewed are stored in the local cache.

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

Notes
When Start ⇨ Options ⇨ Cache ⇨ Purge cache after program end is specified, all documents are automatically deleted from the local cache when closing 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, when this option is selected.

Inbox

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

Document Display Window

Documents are shown in the document display window. When FileDirector Component Services is not installed, the WinClient can only display scanned documents save as TIFF or JPEG. When Component Service is installed, over 200 file formats can be displayed, including all Microsoft Office formats, emails, PDF and CAD drawings.

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

Arrange Windows

Default layouts for the control panel, document display window and document lists can be selected from the ***Windows*** menu or from the ***Windows*** tools on the ***Start*** toolbar, depending upon the display layout selected. This offers several options as to how the windows are displayed.



Toolbars

The configuration of the toolbars bars can be defined, if allowed for the specific user. A FileDirector 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

Selecting split document will split a 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 separately.

The resulting single-page files are added to the local documents 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.

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  or ***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 the Installation Guide*

Local Document List

The Local Document List can be opened by selecting ***File ⇨ Open ⇨ Local Documents,*** or by selecting the ***Local Documents*** tool on the ***Display*** toolbar.

Inbox

The Inbox can be opened by selecting ***File ⇨ Open ⇨ Inbox,*** or by selecting the ***Inbox*** tool on the ***Display*** toolbar.

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 centrally by a FileDirector administrator.

Tool Style

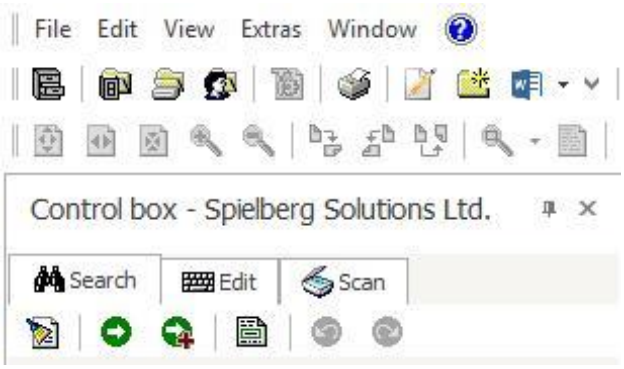
The style in which the tools and menus are displayed is set within the ***Layout*** tab of the WinClient ***Options***.

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.

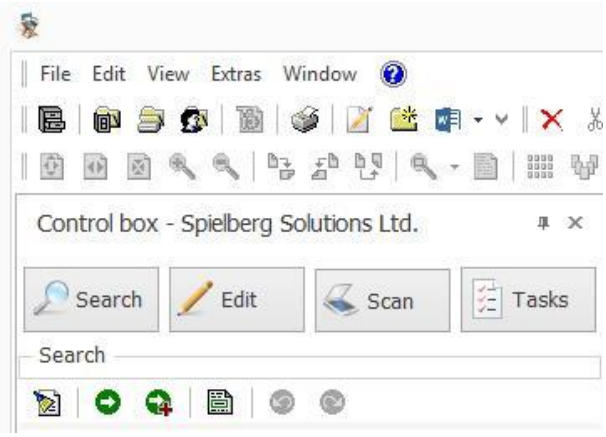
Style 1

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.



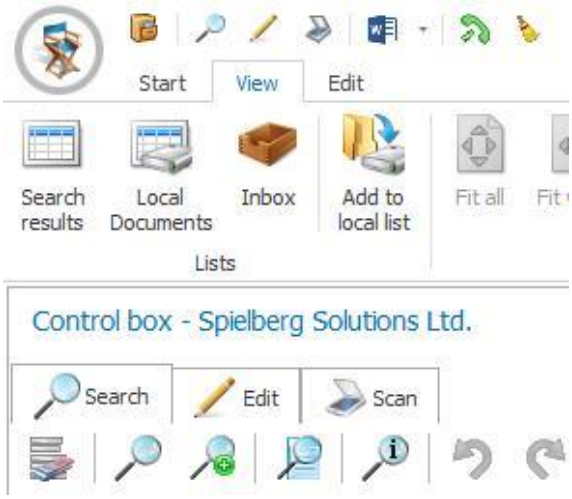
Style 2

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 can be tailored by each user, if the security settings allow this. The rights can be set by a FileDirector administrator. The administrator can also predefine the menus and the options for the users, so that no changes are allowed by users.

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

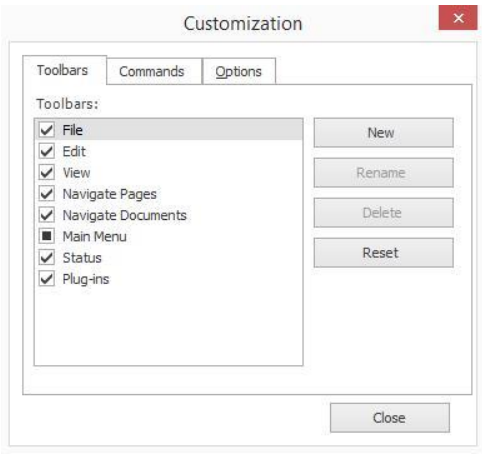
When there are small arrows between the toolbars, the tools available can be modified. If no arrows exist, it is possible, with sufficient rights to use the setup menu by double clicking the free area of that bar.

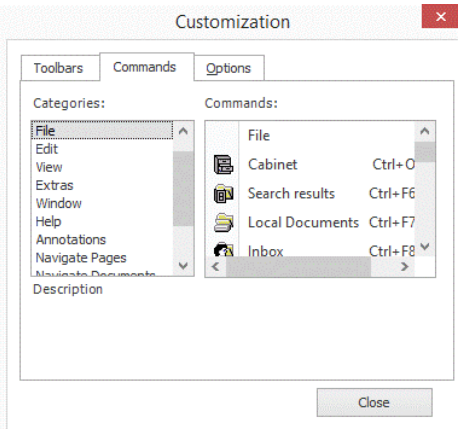
Switch Button Bars On and Off

Using ***Add/Remove Buttons***, each toolbar option 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 tool will be displayed.

Customised Button bars

User defined toolbars 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, and after selecting a category, drag the required Commands to the toolbar.

Toolbar Options

Several 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.

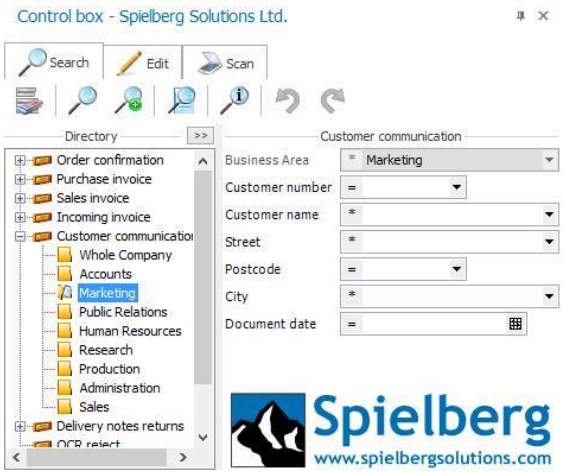
Documents can be searched for using the index data entered against each document, or by searching the contents of the documents themselves by using full text search. For full text search, the OCR Server option is required, and must have been configured to OCR the relevant Document Types.

Control Box

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

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

Document Type Search

This performs a search within the selected Document Type, using the information entered into the index fields.

Cabinet Search

This performs a search across all the Document Types the user has rights to, using the data entered into the common 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 can be searched for 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
Modified by
Modified on
Checked-out by
Checked-out on
State
Pages
Identifier (GUID)

The entry fields for these properties appear in the toolbox below the standard index fields of the selected document type.

Previous/Next Search

The search criteria used during a session is stored by 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 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 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 the ***Search*** tab in the control panel, then specify the document type and enter the search criteria and if appropriate, 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 will be found and displayed.

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

Search using OR Combinations

When several words are entered into an index field, the search 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; and the index field contents will have to match one of the names searched for.

If a document has been stored under ***John Grey***, it will 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*

Wildcard Searching

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

Example:

A search using ***Mi*** will not return ***Smith***, 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 server Using Oracle, a* ***%*** *character must be used for wildcard searches.*

Search in inverted commas

To ensure that a search in the 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

The Most Recently Used (MRU) list holds search entries that have previously been used. Using these, you can reuse the search criteria without having to retype it. The 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-list, select ***Start*** ⇨ ***Options*** ⇨ ***General*** ⇨ ***Clear MRU-List.***

Keyword lists

When an index field has been set to use keywords the keyword list entries can be selected directly. Using the keyboard this list can be opened by ***ALT*** ⇩ .

Shortcuts can be used for keywords which will avoid having to type complete keyword values and accelerate keyboard entry.

Several keywords can be selected simultaneously by checking them in the 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

When a date is to be entered, a calendar opens up next to the index field, and the relevant date can be selected.

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

Memo fields

When a field is configured as a memo field, it can be opened by clicking on the Pin symbol at the end of the field.

ODBC database links

With 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 or when in ***Edit*** mode.

The connection of the 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 *Annotations (OCR Index)*.

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 performed when the documents have been processed using the optional FileDirector OCR Server module, which 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 for multiple words you need to 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 an. ***invoice OR NOT Mueller***, all *invoices* are listed NOT containing the name *Mueller*.

Full text search combined with index fields

A full text search can be combined with an index field search. If the index fields are filled out in addition to 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 written to the full text. It is therefore possible to find documents via index terms and via the full text.*

Search within a Document

When displaying a document that is within a Document Type set for full text OCR, a 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 Type Views

Individual settings for users and groups for the fields in the control box and the Search Results list in the WinClient for a Document Type can be configured. This is done by an administrative user within EnterpriseManager.

These settings can be defined for the Search and Edit/ Scan tabs separately.

Views can be configured that will determine the fields from the Document Type that will be available to the users, and the order in which they are displayed. Additionally, either separators or group separators can be added, to group fields together in the Control box.

Document Lists

The three different document lists in WinClient serve different purposes and allow the processing of documents in different ways. A document may appear simultaneously on different lists, for example as a server document and as a local copy on the local documents list.

Line Colours

The background colour of lines in the Document Lists can be set, depending upon the value held in a field. This can be set within the FileDirector EnterpriseManager.

Der displayed line colour depends on field values specified in EnterpriseManager. The options are that a value held in the field should be: Equal to, Not equal to, Less than, Less or equal to, Great than, Greater or equal to, a between a range.

Multiple conditions can be set so that different colour backgrounds can be used

In case multiple fields with different colours are defined within a single document type, the last field of a document type, defined for line colours and matching with a definition determines the line colour displayed in FileDirector WinClient.

Search Results List

The results of a successful search has been performed are displayed in 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 a single document type, only documents stored in that 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, which gives a quick overview of which documents are available and which documents have been checked out a user.

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 refers 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 workstation, and may be new documents, documents checked out for editing, or those that have been downloaded by the user.

New documents scanned, imported or sent to FileDirector are shown and displayed in the local documents list before they are checked-in and sent to the FileDirector server. Documents which have been checked out and documents for which a local copy has been created are also displayed in the local documents list.

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

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.

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.

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

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

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 *Start ⇨ 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
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 using drag and drop from one group to the other or from 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 workstation or on the FileDirector server. If a document is being edited by another user, it is displayed with a ***read only*** status and cannot be edited by another user at that time.

New

Documents with the status ***New*** 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 workstation and only appear on the local documents 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 the configuration this can be done manually or automatically. Documents with 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. In this way documents can also be displayed without an active 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 current user. 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 with a status of ***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 certain circumstances (for example: checked out documents are stored on a hard disk which is damaged) this status can be reset by an administrator by selecting **Undo Check-out**.
ATTENTION: Checking-In of previously checked out documents is not possible. They must be removed 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 complete. This status can appear in all three document lists.

Deleted

Deleted documents from the server can be shown by selecting ***Info search*** in ***on the Search tab in the Cabinet Control panel*** and selecting the entry ***Deleted*** in the field ***State***. Performing a search will show the deleted documents, they can be undeleted by right-clicking and choosing ***Undelete***.

Field “Status”

The ***Status*** field on the local documents list can display information on issues 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 field will show the reason for this.

The information shown 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 menu which opens when right clicking on the column header.

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

Changing the column order

The order of the columns of a document type can be changed by dragging and dropping a 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. These 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 values returned by the initial search.

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 within 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.

HyperLink

When a URL has been added to a field that has a HyperLink setting, the URL hyperlink will be displayed in the Document Lists, and can be clicked on to open the URL location.

Document Display

About Documents

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

The WinClient has extensive 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.

When 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.

When the Component Service is not installed, these files are displayed as icons and the relevant application, or a third-party viewer must be available 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 thumbnail 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.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

Coverflow

Coverflow allows you to easily page through documents, and to move from one document to another, especially when using a touchscreen. To select Coverflow, a document must already be opened in the document display window.

When selected, all pages of the document are available in the display window, with up to seven pages visible at one time. The selected page is displayed in the middle of the display window, with preceding and succeeding pages shown to the left and right of it respectively.

You can move back and forth through the document by using the mouse and clicking to the left or right of the selected page, or, when using a touchscreen, swiping left or right of the currently selected page.

You can move to the previous or next document by clicking or pressing on the icons shown at the beginning and end of the document.

> *Note*
> *Coverflow is suited for documents with a small number of pages as the whole document is downloaded from the FileDirector server prior to it being displayed. Documents with a large number of pages may take some time to display.*

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.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

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.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

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.

Each thumbnail has a check box below it so that specific pages of a document can be selected.

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, they can be scrolled through by using a mouse wheel after single-clicking in the thumbnails pane.

Open & View Multiple Documents

Multiple documents can be opened and viewed at the same time. This is done 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*** 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 using the 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 stored documents can be rotated temporarily without checking out the document. Users who are only allowed to retrieve documents and not edit can rotate a document.*

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

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. 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 to the FileDirector server. Once checked in, the document is stored in the Cabinet and is available for retrieval by other users.

To edit a document which is stored in a Cabinet it has to be checked-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 viewed by other users. Each change of a document is only stored in the Cabinet and available for other users when 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 a status of ***Checked-Out*** are always displayed on the ***local documents*** 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 via process management.

Select ***Check-In*** in order to check in the selected new or revised 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 during check-in

When 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 due to mandatory field settings, an appropriate hint about the incorrect index appears in the ***Upload Status*** field.

Protected fields

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

Cancel Check-in of documents

Multiple 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, with the right progress bar showing the progress of the current document. A ***Stop*** button is located between the progress bars which will stop the 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 *Start ⇨ Options ⇨ General* tab. The following affect the check in of documents:

Remove new documents after check in

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

Remove revised documents after check in

Previously stored documents which have been checked out appear on the ***local documents*** list of the user. When this option is set, a document with a status of checked out is removed from the local list when it has been checked in again. If this option is not set, the document remains on the local list with a status of ***Archived***

Don’t remove from search result list

A Search Results list is displayed when a user performs a search. If a document from this list is revised, it is checked out and then checked in again. This setting determines if a document is removed from the previous search list after check in or not.

Auto Check-in new documents

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

Auto Check-in new documents after edit

If this option is set, new documents are not checked in immediately but will be after the index information has been edited.

Auto. Check-in revised documents after edit

When documents are already stored on the FileDirector server, they can be automatically checked in to the server after they have been revised when this option is set.

Reminder to check in new documents on program exit

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. The user is then reminded to check in the new documents prior to the WinClient closing.

Reminder to check in documents on program exit

With this option set the user is reminded to check in documents which have been 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 a status of ***Archived*** can be checked out from a FileDirector Cabinet. If a document is checked out, a copy is displayed on the ***local documents*** list of the work station. During the time a document is checked out, it is displayed with a status of ***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 remains 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
ATTENTION: In this case checking in of documents previously checked out is not possible. They have to be removed from the local list and checked out again if they need be changed.

Revisions

All changes on documents in FileDirector are by default stored as revisions. It is not possible to perform a change to a document without storing the changes as revisions, unless a Document Type has been configured to disable revisions.

How is a revision stored?

In revisions of scanned documents 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 of the document.

Display Revisions

The displaying of revisions is protected and has to be granted as a right. To display the revisions click the ***Revisions*** tab, which is shown when the thumbnails are displayed alongside the document. The tab appears in the thumbnail part of the display window. From 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).

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 With Revisions Disabled

If a document type is configured with revisions disabled, it does not create revisions.

Document Editing

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

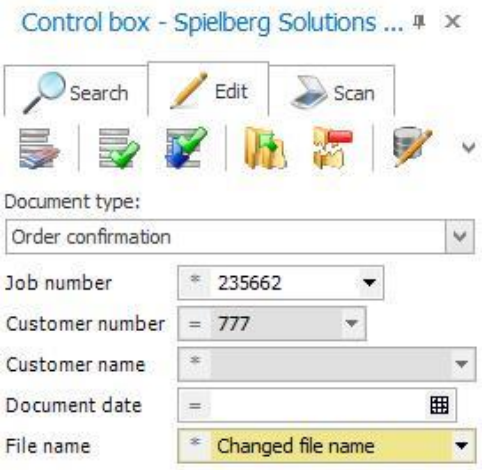
The Control Panel ***Scan*** options include tools for appending, prepending and inserting of pages into existing documents. Pages can also be edited by adding annotations to them.

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

The editing of index data 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, unless the document type has been configured to disable revisions.

Select the document to be edited in the document list. If the document is already stored in FileDirector, 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 data can be entered into the fields or existing index data can be changed.

Click on the ***Save changes*** tool 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 stored in FileDirector, 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 the ***Save changes*** tool 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 stored in FileDirector 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 the ***Save Changes and Move to Next Document*** tool. 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 can only be set 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 the ***Save changes*** tool 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

Documents can be indexed using only the keyboard, moving from one index field to the next by hitting the ***Return*** key. 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 using 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, select the pages in the thumbnail view and by holding the left mouse button down, move to the target position.

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

Move pages from one document to another

If pages are 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 stored document remains and if required 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-folder

Moving documents using drag & drop from a windows directory to a page, a link to documents 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 EnterpriseManager, and then applied to documents within the WinClient, so as to automatically 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 stored 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 EnterpriseManager 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 recognition.

No form recognition - Always use this form

When this option is selected a specific form can be chosen, which is used for the recognition. If an identifier is 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 is dependent on the status of the documents to be combined.

Combining Archived Documents

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

When documents with a status of ***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

When documents with a status of ***New*** are combined, the appended documents can be deleted as they have yet to be stored to the server.

Combining New and Archived documents

When documents with a status of ***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 documents list. The documents to be combined can then 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 a status of ***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.

Add Files

File can be added to an existing document by highlighting document in the Document List and selecting ***Add files*** from the right-click menu. A file selection window opens from which the files to be added can be chosen. The files will be appended to the document

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 a 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 a 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

Using this option a scanned page can be automatically 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 document.

Create an Empty Document

Select ***New document*** from the ***Scan*** tools in the Control Box in order to create an empty document. The document is created in the local documents 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 it is in.

Delete single pages of a document

Display the document and select the page in the display window. In thumbnail view you can also select several pages. The page can be deleted via the main menu or the right-clicking and selecting ***Delete***.

Recovering a deleted page

If a page has been deleted from a stored 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 removed at any time without affecting the server documents.

Documents with a status of ***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 removed from the local list.

Inbox

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

Delete documents from server

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

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 can be automatically transferred to the index fields linked in FileDirector. The connection of the fields and the shortcuts are configured in EnterpriseManager.

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

When a user has full control on a document, that user can access and specify security settings on the document. If for example a different user needs to edit a document which is normally not accessible to that 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 and choose ***Security*** from the ***Edit*** toolbar.

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 access

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

Create

If Create is allowed for a user, that user may create documents and check them in to the server. This setting is only applicable for new documents. Appending, or changing existing documents is not affected by this setting.

Delete

When Delete is allowed, the user can delete stored documents from the server. This setting is not applicable for new documents yet to be stored to the server.

Modify

With this right allowed, index data may be changed, pages may be appended and annotations may be set.

Display

When Display is allowed, the user can view the document.

Download

With Download allowed, a user can search for and view the document pages.

> *Notes*
> *The management of the local cache and 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 allowed, the user can view all revisions associated with the document. When denied, the user may only download the latest revision of the document.

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 over 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 ***Hide/Show 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 first be displayed. 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 ***Annotations*** 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 are displayed in a window. Enter the text, and select the font and colour. After clicking ***OK*** the text annotation is displayed on the page.

The annotation text 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***, then select the colour 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***, then select the colour 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***, then select the colour and click ***OK***.

Sticky Note

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

When 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 annotation properties are displayed in a window. Enter the text and select the 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 the note 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.

When this annotation type is selected, drag a box 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.

Enter a description for the hyperlink 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 place a signature on a document an image must be defined first. To do this, select *Start ⇨ Options ⇨ Signature ⇨ Choose your signature image*. You can define up to three different signatures for one person. To place the signature a password must be entered, the same password must be configured for all three signatures. The image 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 image 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. Stamps can also be applied to a page by using the hotkey combination defined for the stamp in EnterpriseManager.

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

Notes
a) Stamps are only available when they have been configured in EnterpriseManager 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 JPEG format.

OCR Index

With OCR Index 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 ***OCR Index*** from the list of annotations.
5. Drag a zone around the information to be read.

Note:
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.

Hyperlink to another document

Open the document to which the annotation is to 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 to 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 documents.

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

Move annotations

To move an annotation, select it by clicking and holding down 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 allow the printing of single or selected documents and printing of single and selected pages of a document.

You can print TIFF and JPEG formats with the 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, right-click on the document you want to print in the document list, and then select ***Print*** from the context menu.

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.

Right-click on the highlighted documents and select ***Print*** from the context menu.

Print selected documents

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

Right-click on one of the highlighted documents and select ***Print*** from the context menu.

Print one page of a document

Open the relevant document and display the page to be printed. Right-click on the page and select ***Print*** from the context menu.

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.

Click on the check boxes below each thumbnail for the pages to be printed. Alternatively, hold the ***CTRL*** key down and click on the pages to be printed in thumbnail view. Right-click on one of the selected thumbnails and select ***Print*** from the context menu.

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 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*** from the ***Start*** toolbar. 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. Many scanners are supported without the need for additional driver installation. Depending on the scanner, black and white, greyscale and colour documents can be created.

Supported scanners

The support of a scanner depends on the available drivers. Many Canon drivers are integrated in to FileDirector. 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.

Canon Scanners

CR-180 (Cheque scanner)
DR-2010C
DR-2050C
DR-2080C
DR-2510C
DR-2580C
DR-3010C
DR-3020
DR-3060
DR-3080C
DR-3080CII
DR-4010C
DR-5010C
DR-5020
DR-5060F
DR-5080C
DR-6010C
DR-6030C
DR-6050C
DR-6080
DR-7080C
DR-7090C
DR-7550C
DR-7580
DR-9050C
DR-9080C
DR-C120
DR-C125
DR-C130
DR-C225
DR-G1100
DR-G1130
DR-M140
DR-M160
DR-M160II
DR-X10C
MEAP
MS 300
MS 350

Epson Scanners

DS-510
DS-520
DS-560
DS-760
DS-5500
DS-6500
DS-7500
DS-50000
DS-60000
DS-70000

Panasonic Scanners

KV-S2087

Plustek Scanners

PS406U
PS456U

In order to use the scanners, scan profiles are configured using EnterpriseManager, 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 access 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 EnterpriseManager by a FileDirector administrator. Scan profiles can 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 being 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 be temporarily changed in the WinClient. For example the brightness setting can be adjusted to the quality of the documents to be scanned. The available 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 date and 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_Smith.tif
0002_Brown.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 is 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 and OCR recognition is used, 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

When 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 resolution, colour settings, and single or double-sided scanning. For certain scanners, an ***Extended*** tab may be shown within the 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 the 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 EnterpriseManager.

To scan a multipage document:

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

If the contents of the index fields currently displayed need to be cleared 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 when 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 clear 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 when 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 are to be appended has a status of ***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 the ***Stop Scanning*** tool on the ***Scan*** toolbar

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

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 using default settings. Additional shortcuts can be created, adding parameters to the startup 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. Adding the ***/Scanstation*** switch to the WinClient startup command, when a 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 startup 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

Using 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 that 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 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 filenames. 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 therefore 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 text file, and import the index data and documents.

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

When the import has completed, 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 and 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 popular 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 other 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 window 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 ***Add-ins*** toolbars. In Office 2010/2013 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 window will save the document to the Local Documents 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 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 matches 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 a 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 be revised in the application and sent to FileDirector. The user will be automatically 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 save 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, setting 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 the ***app.xml*** of FileDirector Component Service, held in the Component Service installation location.

Attachments as Separate Pages

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

<add key="EMailSplit" value="On" />

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***.

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 ***Start⇨Options⇨Misc***. The advantage of this setting 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.

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 in a document list on the 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 *Start⇨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 EnterpriseManager. 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 Selected Documents

Select the first document you want to send in the document list. Now press and hold the CTRL key and select the other documents to be sent. After selecting the last document select ***Send to*** and now ***Email*** via right-click menu.

The email Client will open a new message and attach the selected 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 ***Start⇨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 *Start ⇨ 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 EnterpriseManager 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

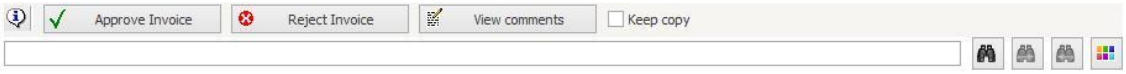
- New documents added to a Document Type optionally depending upon index criteria set for the document
- Existing Documents within a Document Type, depending upon index criteria set for the document.

Document Receipt

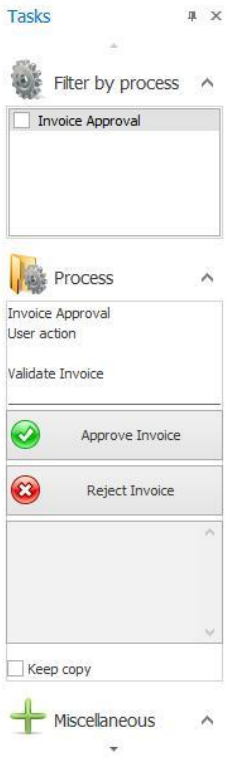
Each document received by a user from a process is listed in their Inbox. The action which the user must perform is displayed in the ***Action*** column of the Inbox. This includes documents received as part of a process and from ad hoc workflows.

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 removed 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.

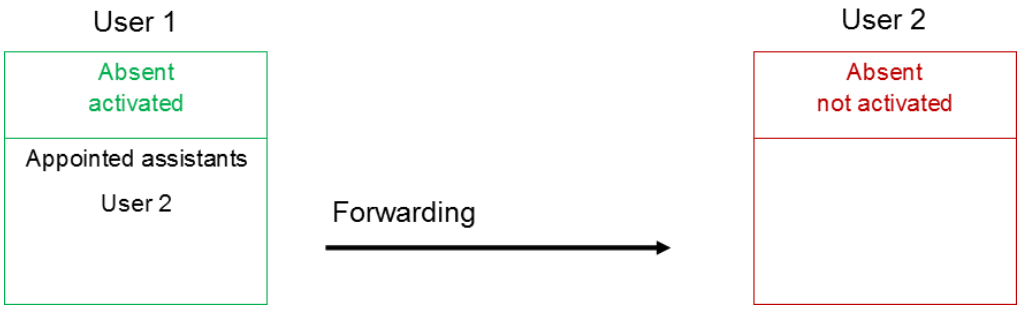
The settings can be applied by selecting ***Extras ⇨ Absence Settings***. This can also be done by a FileDirector administrator in EnterpriseManager.

Example 1:

Only one appointed assistant is set.

User 1 sets as appointed assistant only user 2 and user 2 does not have an absence set.

The documents are forwarded to user 2.

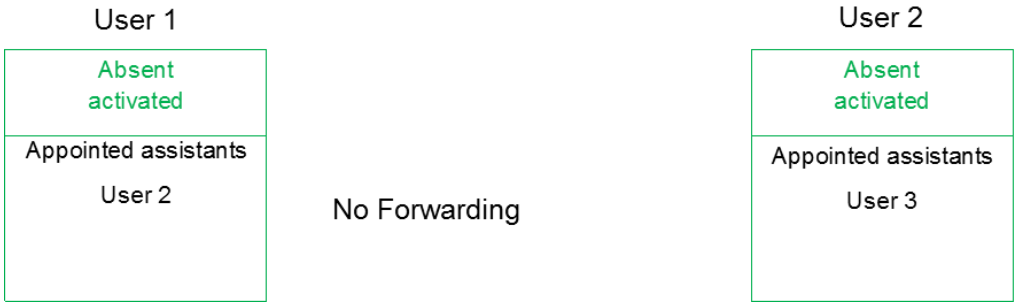


Example 2:

Only one appointed assistant is set.

User 1 sets as appointed assistant only user 2 and user 2 has an absence set.

The documents are not forwarded.

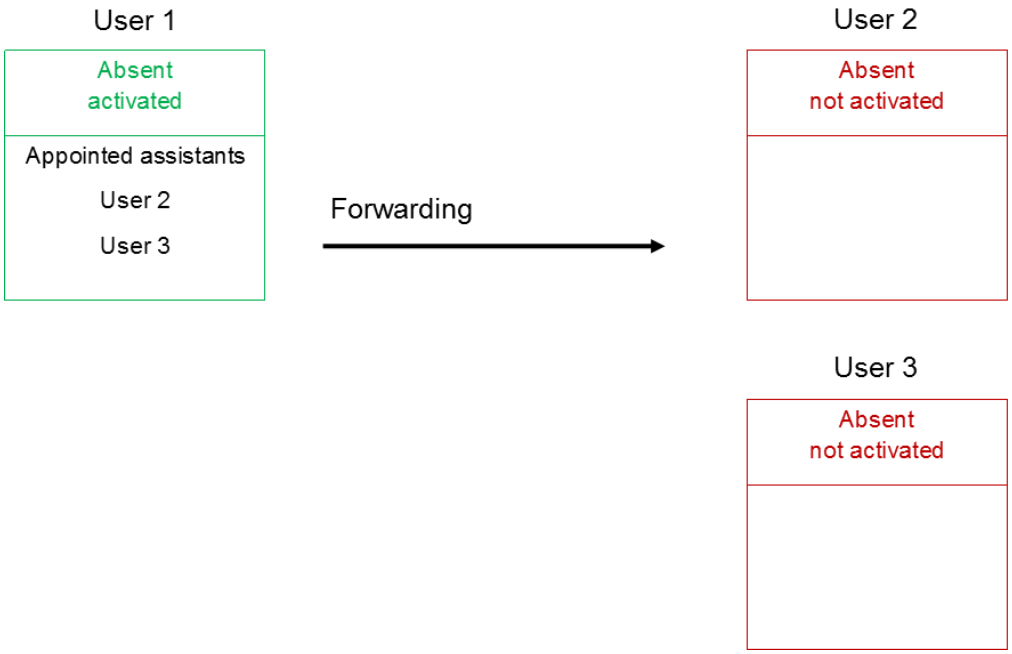


Example 3:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. Neither user 2 nor user 3 have activated the absence setting.

The documents are forwarded only to the first user in the list.

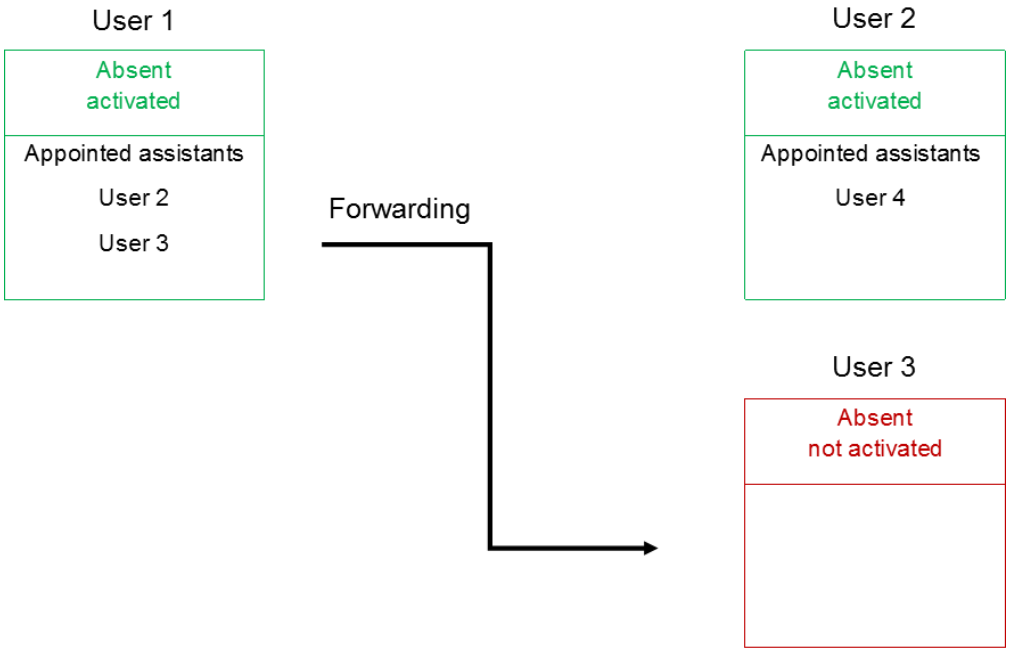


Example 4:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. User 2 has also an activated absence but user 3 has not activated the absence setting.

The documents are forwarded only to the first user in the list without an activated absence setting.

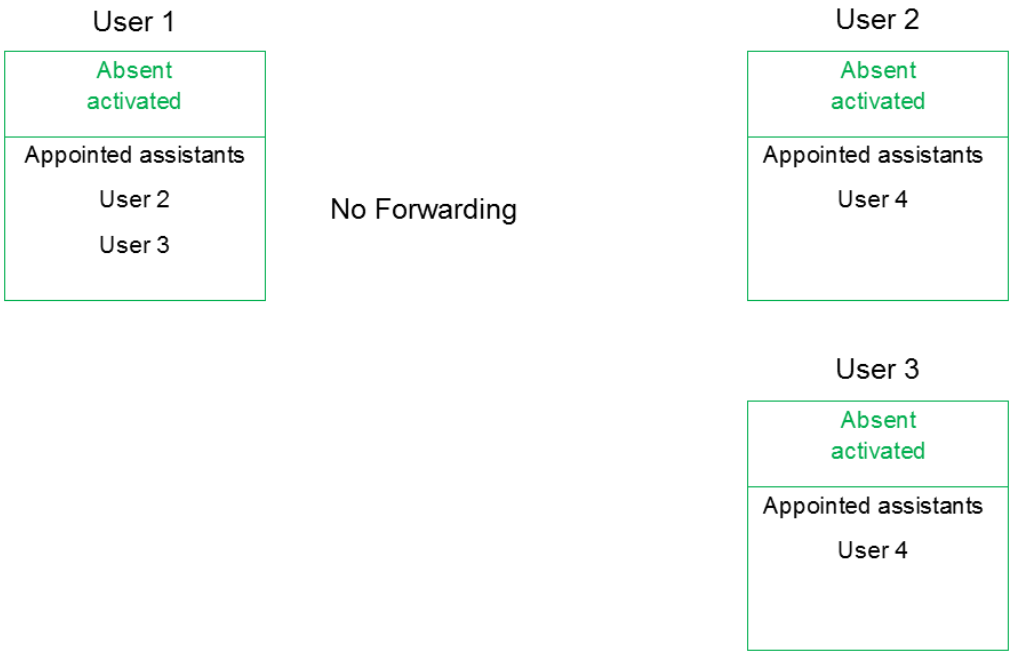


Example 5:

Several appointed assistants are set.

User 1 sets, as appointed assistants during his absence, user 2 and user 3. User 2 and user 3 have also an activated absence.

The documents are not forwarded.



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 ***Start*** toolbar. 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 removed 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.

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.

Sign PDF file

This option allows certificates to be added to PDF documents. The certificate that you want to use for signing, must be installed on the local computer first and then added within the option tab ***Signatures*** in the section ***Digital.***

Note:
PDF files are signed when a PDF file is checked-in.

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)	Espanol
English (US)	Japanese
Deutsch	Chinese (Big5)
Francais	Chinese (Simplified)
Portugues	

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.

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.

This option is available for *Local Documents* and Hitlist

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.

Document Type

Using this option, you can select the default Document Type to be shown in the Control panel whenever the currently open Cabinet is subsequently opened.

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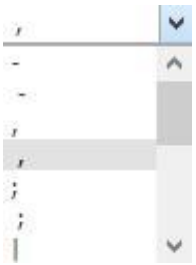
The page number is printed on the top right of the page.

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

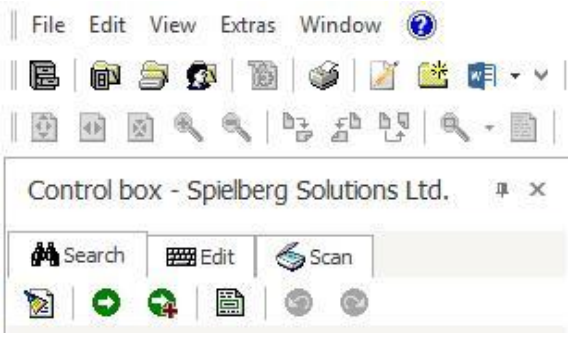
The Layout option allows you to configure how the WinClient will look, and what type of tool icons will be used.

WinClient Layout

There are three styles available

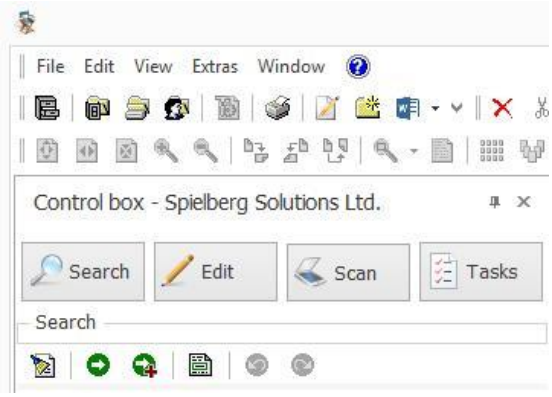
Style1

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



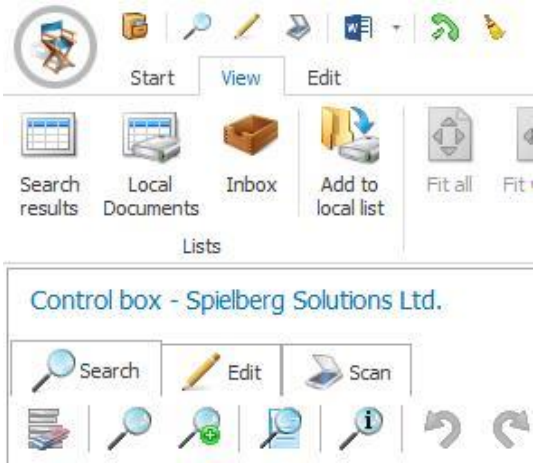
Style 2

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

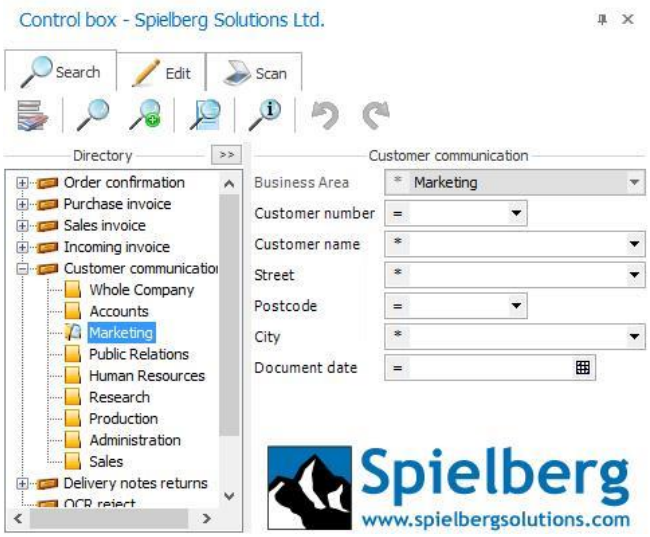
Context menus

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

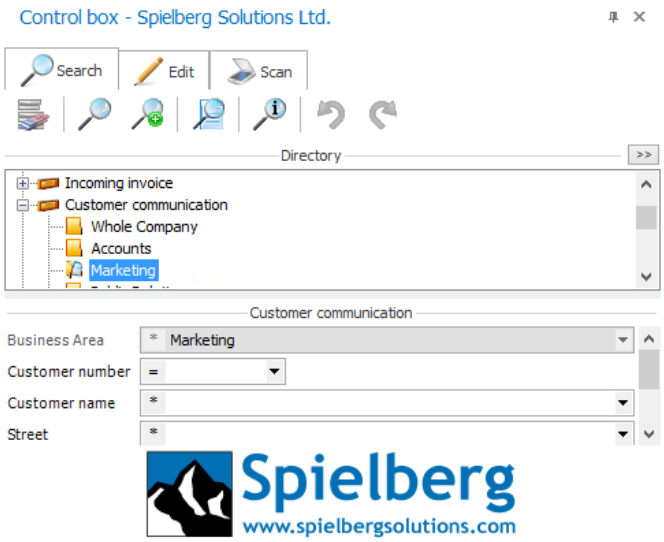
Tree position

You can select the position of the tree of your filing system structure. The tree can either be displayed left of your index fields, above or below them.

Left



Top



Bottom



Note:
This setting is only taken into account when using a filing system structure.

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.

Messages

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.

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 changes causes check-out

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

Warning when documents are combined by user

When set, this option will display a confirmation message before the selected documents are combined.

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 a 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 EnterpriseManager.

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.

MRU Lists

With Most Recently Used (MRU) lists, search entries that have previously been used are listed. Using these, you can reuse the search criteria without having to retype it. The 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.

Deactivate MRU lists

With this option selected, search criteria will not be saved, and the MRU list will be unavailable.

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-list, select *Start ⇨ Options ⇨ Cache ⇨ Clear MRU-List.*

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).

Fallback URL

A secondary server connection can be set, so that if a connection to the primary server cannot be established, the WinClient will attempt to connect to the secondary server. Only connections that have been previously configured will be available for selection.

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 EnterpriseManager 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.

To run a 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.

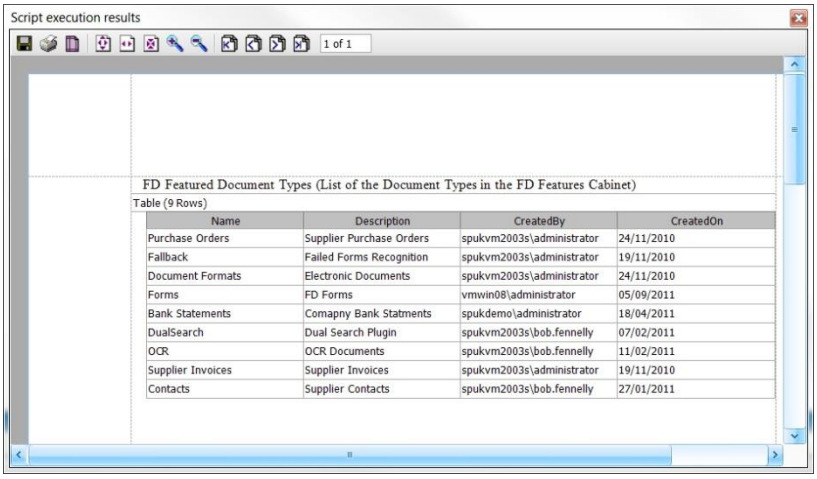
Script Results

The script results window will display the information returned by the script query, in tabular format.

Export

The report can be printed, or can be saved in the following formats: PDF, XLS, RTF and CSV, by selecting ***Export***. The report can be paged through and different zoom levels can be selected

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 EnterpriseManager 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.

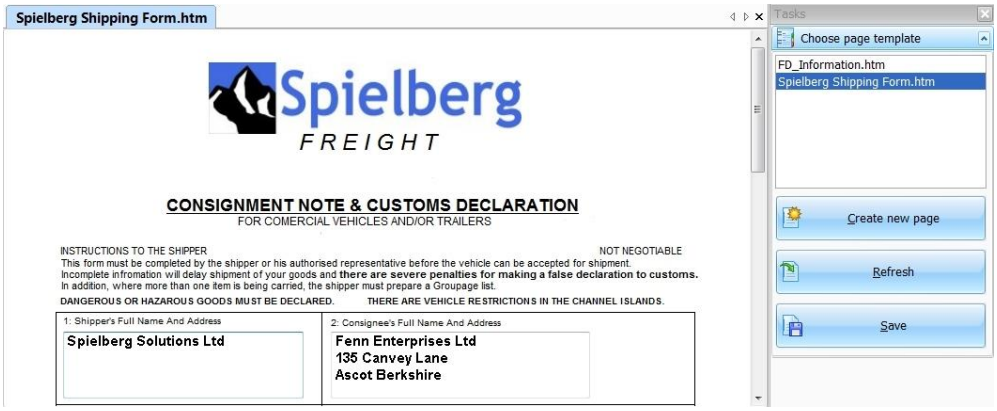
Refresh

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 features 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 Toolbar

To use the plug-ins after installation, the features may need to be added to the toolbar. 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 EnterpriseManager.

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.

Plug-in Manager

Using the Plug-in manager, the installed plugins can be enabled or disabled. When disabled, they will not be available on the toolbar.

To open the manager, click on the toolbar icon. The installed plug-ins will be listed, with a tickbox beside each plug-in name showing whether it is enabled or not. When the box is ticked, the plug-in is enabled, and will be available on the toolbar.

You can enable or disable any of the listed plug-ins. Once changes have been made, press the ***OK*** button to save them. If any changes have been made you wil be prompted to restart the WinClient for the changes to take effect.

Note
You may not have permissions to change the plug-ins settings, as these may have been configured by an administrator using Client Configuration. If this is the case, any plug-ins must be enabled or disabled by and administrator using EnterpriseManager.

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.

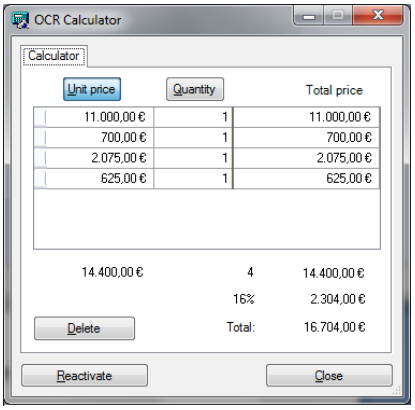
Notes
The ID of a field is shown in the properties window of a field in EnterpriseManager.

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 EnterpriseManager.

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 Select details if several entries are available for one Supplier ID <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):

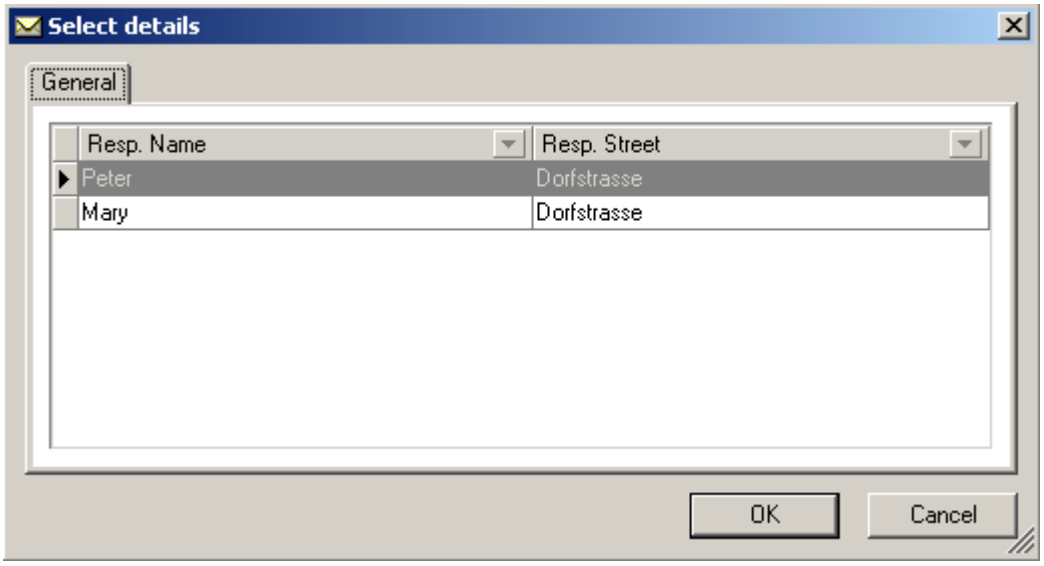
[FD_90511262] [FD_1E074F71]
[FD_ E4A1A0A2]
[FD_2B11B6E4] [FD_ E13A67C0]

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.

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

Document Viewer

When Component Service is installed the, Document 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 viewer or you have trouble displaying these files via the WinClient, the viewer can be switched off for these formats.

WinClient Settings

The 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 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

Additional Settings

The Windows Client configuration file ***app.xml*** contains keys that can be changed that affect the way that documents and data are displayed, and can also change the way some features work. The keys must be set in the ***<appsettings>*** section of the app.xml.

Default Zoom Mode

Sets the default document zoom mode

<add key="DefaultZoomMode" value="FA" />
Values
FA= Fit all
FW = Fit width
FO = Original width

Display Display Mode

Sets the default document display and thumbnail mode

<add key="DefaultDisplayMode" value="TI" />
Values

TI	= Thumbnails and Image
T	= Thumbnails only
I	= Image only
DSTI	= Duplex view and thumbnails
DSI	= Duplex view
DTTI	= Book mode and thumbnails
DTI	= Book mode
TCF	= Thumbnail cover flow

Email Link Targets

When using Send to email as link the links to be created can be set using this key. One or both settings can be used.

<add key="EMailLinkTargets" value="Web;WinC" />
Values

Web	= Create link to show document in Web Server
WinC	= Create link to show document in the Windows Client

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