Version 4.0



ExplorerClient
Quick Guide

Spielberg
POWERED BY EFALIA

Disclaimer

Spielberg Solutions GmbH makes no representation or warranties with respect to the contents or use of this document and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Spielberg Solutions GmbH reserves the right to revise this publication and to make changes to its content, at any time, without obligation to notify any person or entity of such revisions or changes.

Further, Spielberg Solutions GmbH makes no representations or warranties with respect to any FileDirector software, and specifically disclaims any express or implied warranties of merchantability or fitness for any particular purpose. Further, Spielberg Solutions GmbH reserves the right to make changes to any or all parts of FileDirector software, at any time, without obligation to notify any person or entity of such changes.

Copyright

© 2023 Spielberg Solutions GmbH. All Rights Reserved.

No part of this document may be reproduced, transmitted or stored in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Spielberg Solutions GmbH.



FileDirector is a registered trademark of Spielberg Solutions GmbH.

Windows is a registered trademark of Microsoft Corporation in the United States and other countries.

Other product and company names mentioned herein may be trademarks of their respective owners.

Africa, Asia, Australia, Europe and USA

Spielberg Solutions GmbH
Obere Kaiserswerther Str. 17
D-47249 Duisburg
Germany
Email: info@spielberg.de
Web: www.spielberg.de

UK and Eire

Spielberg Solutions Ltd
Unit 11
Basepoint Business & Innovation Centre
Metcalf Way, Crawley
RH11 7XX, UK
Email: info@spielbergsolutions.com
Web: www.spielbergsolutions.co.uk

Software Licence Agreement

IMPORTANT: Read this agreement before installing FileDirector. By installing FileDirector you are deemed to agree to be bound by this agreement.

This licence agreement is a legal document between you and Spielberg Solutions GmbH. If you do not agree to the terms of this agreement return the software CD and accompanying documentation (the "Documentation") and other items to the place from where you obtained them for a refund before they are marked or damaged in any way.

In consideration of the right to use the Software you agree to abide by the terms and conditions of this agreement.

GRANT OF LICENCE

The Software consists of the software modules by:

Spielberg Solutions GmbH, a German public listed company having its place of business at Obere Kaiserswerther Str. 17, 47249 Duisburg, Germany ("Spielberg");

Microsoft Corp., a Washington Corporation having its place of business at 1 Microsoft Way, Redmond, WA 98052-6399, USA ("Microsoft");

MICROPLEX Trading GmbH, a German Company having its place of business at Leipziger Chaussee 191g, 06112 Halle, Germany ("Microplex");

Kofax Inc.., a Californian Company having its place of business at 15211 Laguna Canyon Road, Irvine, CA 92618-3146, USA ("Kofax;");

Developer Express Inc., a Nevada company having its place of business at 6340 Mcleod Dr. Suite1, Las Vegas, NV 89120, USA ("DevExpress");

Dell EMC Corporation, a Massachusetts company having its place of business at 176 South Street, Hopkinton, Massachusetts 01748, USA ("EMC");

Oracle Corporation, a Californian company having its place of business at 500 Oracle Parkway, M/S 5op7, Redwood Shores, California 94065, USA ("Oracle");

PDFTron Systems Inc., a British Columbia corporation, having offices at 838 West Hastings Street, Suite 500, Vancouver, British Columbia, V6C 0A6, Canada ("PDFTron").

The software consists also of Open Source modules, listed below:

Software, which is based in part on the work of the Independent JPEG Group.

Cryptographic software written by Eric Young (eay@cryptsoft.com).

It uses the FreeImage open source image library. See http://freeimage.sourceforge.net for details.

FreeImage is used under the FreeImage Public License (FIPL) version 1.0.

LibTIFF Copyright (c) 1988-1997 Sam Leffler

LibTIFF Copyright (c) 1991-1997 Silicon Graphics, Inc.

LibTIFF: Permission to use, copy, modify, distribute, and sell this software and its documentation for any purpose is hereby granted without fee, provided that (i) the above copyright notices and this permission notice appear in all copies of the software and related documentation, and (ii) the names of Sam Leffler and Silicon Graphics may not be used in any advertising or publicity relating to the software without the specific, prior written permission of Sam Leffler and Silicon Graphics.

You understand and acknowledge that any software module included in the Software may have utility with or be able to be called by other software and/or hardware, which Spielberg considers to be an unauthorised use of the Software. Accordingly, you agree that you will use such software modules only as part of the Software and not in conjunction with, or as part of, or as a component of other software and/or hardware which makes calls to such software modules.

Spielberg grants you the personal non-exclusive rights:

For a single-user version of the Software, to install and use the Software for internal purposes only on a single computer (the Software is considered in use when it is installed in the temporary memory, i.e. RAM, or the permanent memory, i.e. Hard Disk Drive).

For a multi-user version of the Software, to install and use the Software for internal purposes only for the number of computers or simultaneous users identified in the Installation Configuration sheet of the Software package (for example, if you have purchased a 5-User licence you may install the Software for simultaneous use by up to 5 Users on a network).

BACKUP COPY

You may make whatever copies you deem appropriate from the FileDirector "delivery" Compact Disc, the Programs, Example Files and any other promotional material that may be included thereon. The Application Manual, or any part thereof, may be reproduced in sufficient quantity to support only the number of users licenced to you and no more. You must reproduce and include on the backup copy the copyright notice and other ownership or proprietary legends that are on the original copy of the Software.

You may NOT make or attempt to make any copy whatsoever of the FileDirector Licence. ANY ATTEMPT TO COPY, TRANSFER OR RESTORE THE LICENCE MAY CORRUPT THE ENABLING LICENCE. The Licence, once enabled, represents the full purchase value of the licence to use the FileDirector Software. The enabled Licence can be manipulated ONLY by the commands within the FileDirector application.

RESTRICTIONS

You may not market, distribute or transfer the Software or the Documentation to others, or electronically transfer the Software from one computer to another over a network except as expressly provided herein.

You may not de-compile, reverse engineer, disassemble or otherwise reduce the code of the Software to a human perceivable form.

You may not modify, adapt, translate, rent, lease or loan the Software or the Documentation or create derivative works based on the Software or the Documentation.

OWNERSHIP AND COPYRIGHT

Spielberg, Microsoft, Microplex, Kofax, DevExpress, PDFTron and Pixel reserve all rights to their respective software modules of the Software and the Documentation. The Software and the Documentation is copyrighted. Unauthorised copying of the Software, including portions thereof, or the Documentation is expressly forbidden.

EXPORT CONTROL

You agree that the Software and Documentation will not be shipped, transferred or exported into any country or used in any manner prohibited by the United States Export Administration Act or any other applicable export control laws, restrictions or regulations of the countries involved.

SUPPORT AND UPDATES

Spielberg, Spielberg's subsidiaries or affiliates, their distributors and dealers are not responsible for maintaining or helping you to use the Software and the Documentation, excepting where agreements have been entered into between specific parties, i.e. Spielberg: Distributor, Distributor: Dealer, Dealer: End User.

No updates, fixes or support will be made available for the Software and Documentation other than by publishing such revisions on the Spielberg web site: http://www.spielberg.de or http://www.filedirector.com

Any updates, fixes or support will be made available on the said web site solely at the discretion of Spielberg, who is under no obligation whatsoever so to do.

LIMITED WARRANTY AND DISCLAIMER OF INDEMNITY

Limited Warranty. The Software and documentation is provided "as is" without warranty of any kind, either express or implied, including, but not limited to implied warranties of merchantability and fitness for a particular purpose. The entire risk as to quality and performance of the Software and documentations is with you. Should the Software prove defective you (and not Spielberg, Spielberg's affiliates, their distributors or dealers) assume the entire cost of all necessary servicing, repair or correction. Some states or jurisdictions no not allow the exclusion of implied warranties, so the above exclusion may not apply to you. This warranty gives you specific legal rights and you may also have other rights which vary according to state or jurisdiction.

Spielberg, Spielberg's affiliates, their distributors and dealers do not warrant that the functions contained in the Software will meet your requirements or that the operation of the Software will meet your requirements or that the operation of the Software will be uninterrupted or error free.

However, Spielberg or Spielberg's affiliates warrants a compact disc or diskette on which the Software is stored to be free from defects in materials and workmanship under normal use for a period of ninety (90) days from the date you purchased the same, as evidenced by a receipt or otherwise. Some states or jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to you.

CUSTOMER REMEDIES

Spielberg's entire liability and your exclusive remedy shall be the replacement of the Compact Disc and/or Diskette not meeting the LIMITED WARRANTY and which is returned to Spielberg or Spielberg's marketing affiliate, Spielberg Solutions Limited, with a copy of your receipt or otherwise. The LIMITED WARRANTY is void if failure of the Compact Disc has resulted from accident, abuse or misapplication of the software.

No liability for consequential damages. In no event shall Spielberg, or Spielberg's affiliates, their distributors or dealers be liable for any damages whatsoever (including without limitation, direct or indirect damages for personal injury, loss of business profits, business interruption, loss of business information, or other consequential or incidental damages) arising out of the software, the use thereof or inability to use the software even if Spielberg, Spielberg's affiliates, their distributors or dealers has been advised of the possibility of such damages. Some states or jurisdictions do not allow the exclusion or limitation of liability for consequential or incidental damages, so the above limitation may not apply to you.

Disclaimer of indemnity. Spielberg, Spielberg's affiliates, their distributors and dealers shall have no obligation to indemnify you against any claim or suit brought to you by a third party alleging that the Software or the use thereof infringes any intellectual property of such third party.

TERM

This agreement is effective upon the installation of FileDirector Server and Client and remains in effect until terminated. You may terminate this agreement by destroying the Software and any copy thereof. This agreement will also terminate if you fail to comply with any of the terms of this agreement. In addition to Spielberg enforcing its legal rights, you must then promptly destroy the Software and any copy thereof.

ACKNOWLEDGEMENT

By selecting the 'Yes, I accept the agreement' option during the software installation process, you acknowledge that you have read this agreement, understand it and agree to be bound by its terms and conditions. You further agree that this agreement is the complete and exclusive statement of agreement between you and Spielberg concerning the subject matter hereof, which supersedes any proposals or prior agreements, oral or written, and any other communication between you and Spielberg relating to the subject matter hereof. No amendment to this agreement shall be effective unless signed by a duly authorised representative of Spielberg.

Should you have any questions concerning this agreement, or if you desire to contact Spielberg for any reason, please write to your authorised supplier requesting that they pass your correspondence to Spielberg Solutions GmbH.

Table of Contents

FileDirector ExplorerClient 7
Overview 7
Installation 7
Log-in 7
Refresh 8
Working with FileDirector ExplorerClient 9
Hitlist 9
Search 10
Create 12

FileDirector ExplorerClient

Overview

The FileDirector ExplorerClient is a small application, developed for a smart integration of basic FileDirector features into the Microsoft Windows Explorer on a Windows client.

Installation

The corresponding installation files are within the ExplorerClient folder of your FileDirector product.

The folder contains an *ExplorerClient.msi* and a *setup.exe* file.

The file setup.exe must be *Run as adminsistrator* and will start actual installer *ExplorerClient.msi*.

At the beginning of the installation routine, it can be selected whether the ExplorerClient will be installed for Windows accounts, using this system or only for the actually logged-in Windows user account.

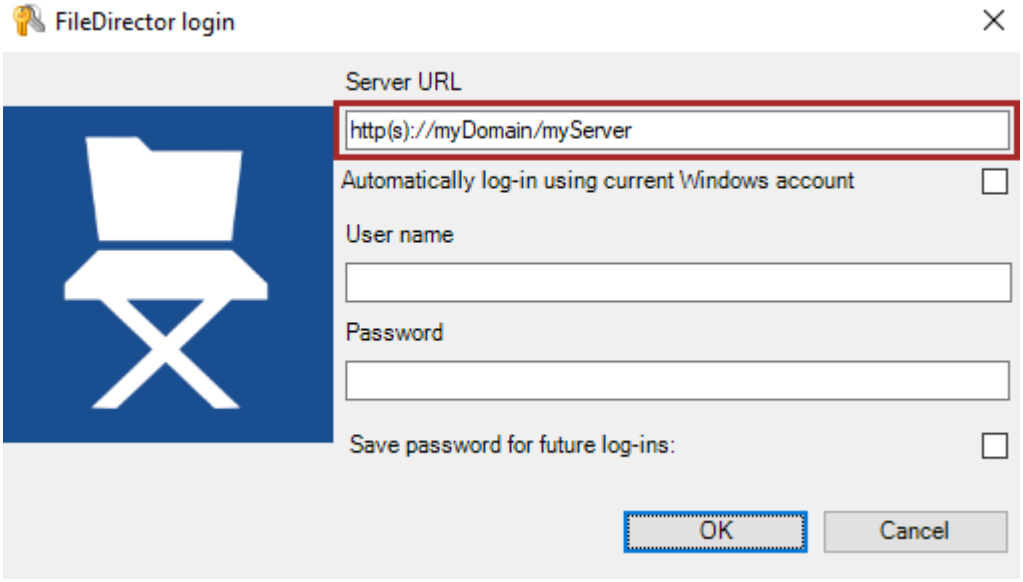
> *Note:*
> *A user must also be a FileDirector user to access the data, stored in FileDirector.*

After a successful installation of FileDirector ExplorerClient, it will be displayed under *This PC* and *Devices and drives*.

Log-in

After selecting the FileDirector ExplorerClient icon in Microsoft Windows Explorer for the first time, a Log-in window is shown.

At the first log-in, the URL of the FileDirector Server must be provided, within the area, marked on the screenshot below.

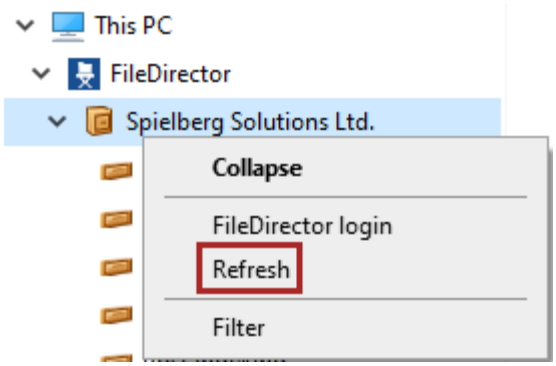


FileDirector ExplorerClient either works with local Windows accounts, ActiveDirectory accounts and the option for an *Automatically log-in using current Windows account* or FileDirector Built-in Domain accounts.

It is also possible to *Save password for future log-ins*.

Refresh

The option *Refresh* updates the cabinet structure of the selected cabinet.



Note:
A Refresh must be performed after administrative changes done by an administrator in FileDirector EnterpriseManager. This includes changes within the rights and user management or the cabinet structure.

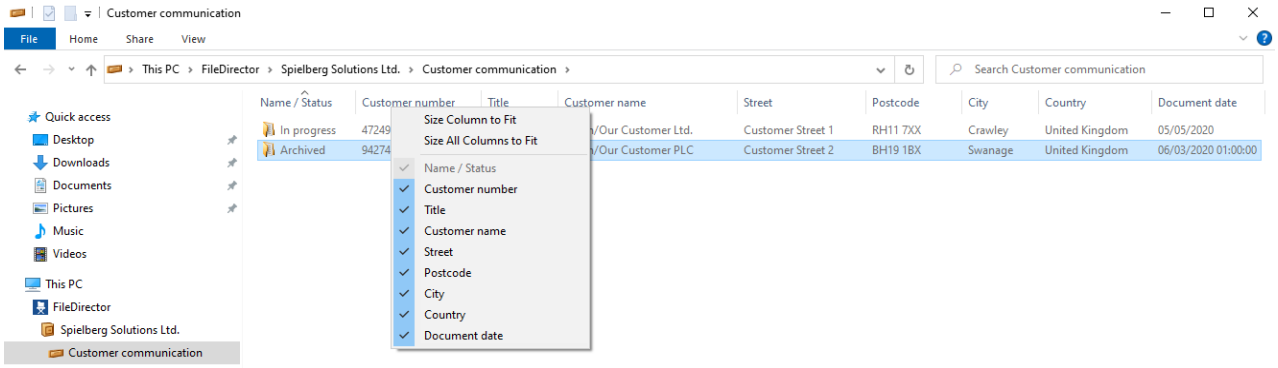
Working with FileDirector ExplorerClient

Hitlist

After selecting a document type, the stored documents are displayed on the right-hand side.

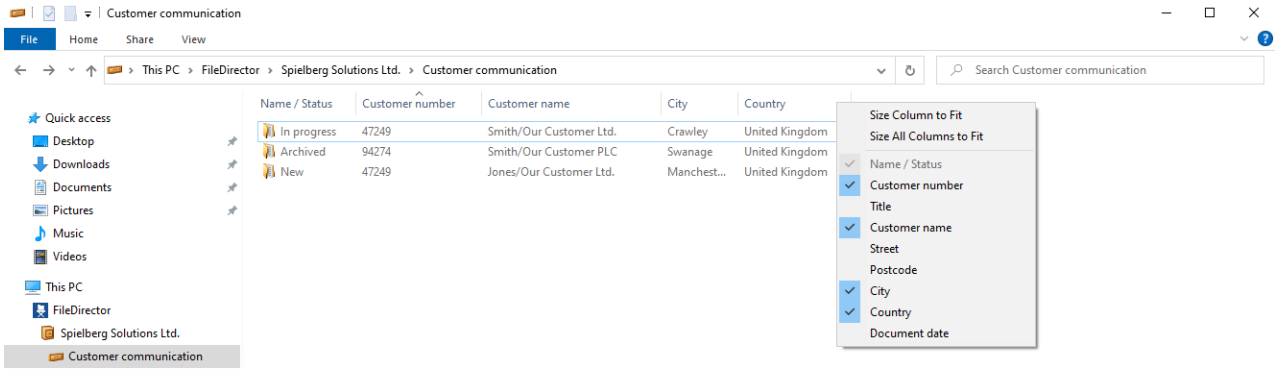
The appearance and the content of the list can be adapted by using the header.

The amount of displayed fields can be changed through the context menu of the right mouse button. Also the size of the columns can be adapted easily using *Size Column to Fit* or *Size All Columns to Fit*.



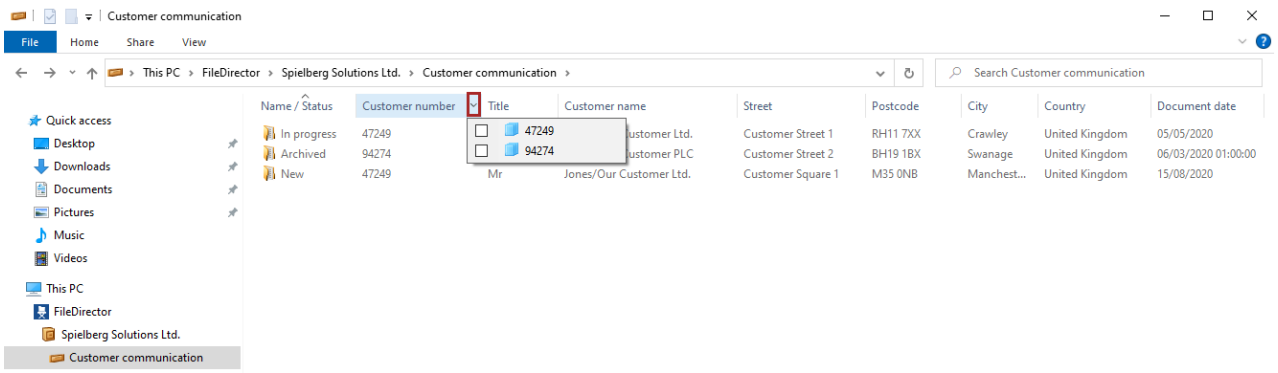
Example (Customise Columns)

In this example, only the FileDirector fields *Customer number*, *Customer name*, *City* and *Country* are selected.



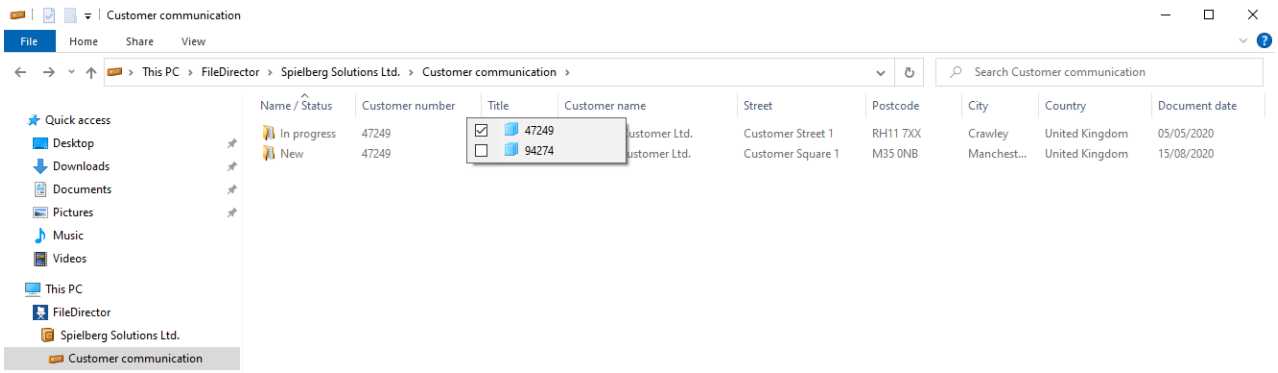
Example (Filter List)

The header of the hitlist can also be used for a quick filtering. The icon on the right of a field column opens a menu, which lists all contained values. Now, one or multiple entries can be selected, using the checkboxes.



Result

In this case, the field *Customer number* was filtered by the value *47249*.



Search

A search in FileDirector ExplorerClient consisting of three steps.

At first, the cabinet and the document type must be selected.

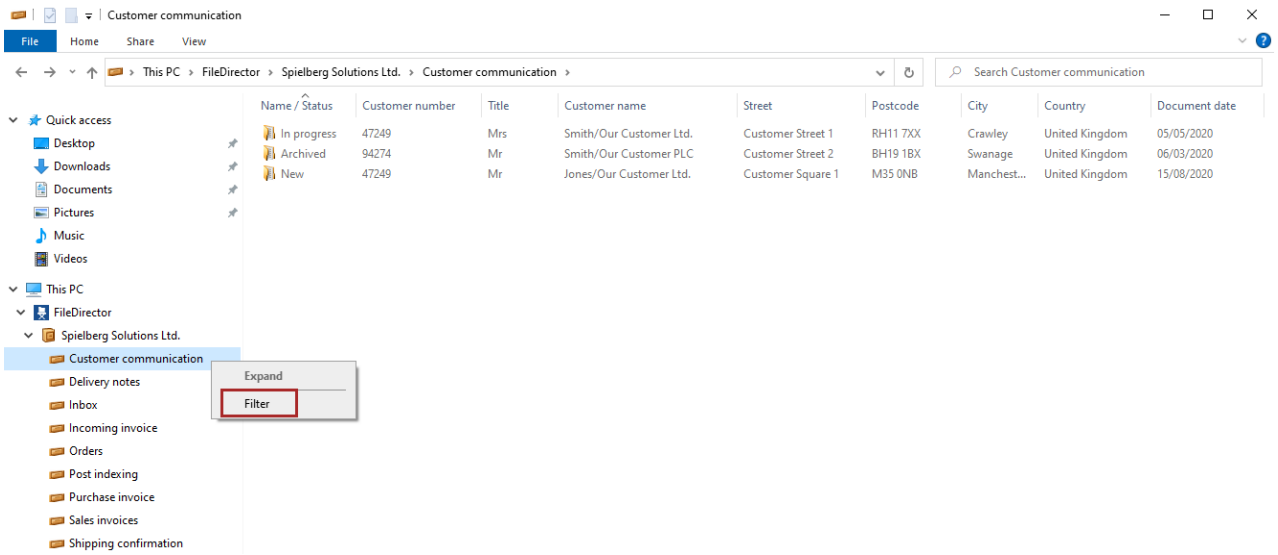
After this, all stored documents of the selected document type will be displayed on the right-hand-side of the Windows Explorer.

Now, the *Filter* option is needed to filter the list for the required information.

Filter

This option is part of the context menu of the right mouse button.

Simply select either the document type on the left hand-side.



The pop-up window Filter is displayed.

Example 1

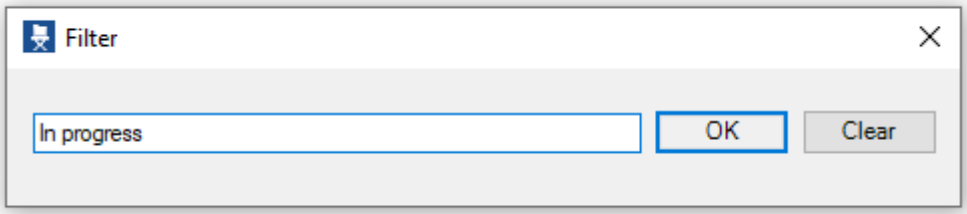
Unfiltered List

Name / Status	Customer number	Title	Customer name	Street	Postcode	City	Country	Document date
In progress	47249	Mrs	Smith/Our Customer Ltd.	Customer Street 1	RH11 7XX	Crawley	United Kingdom	05/05/2020
Archived	94274	Mr	Smith/Our Customer PLC	Customer Street 2	BH19 1BX	Swanage	United Kingdom	06/03/2020
New	47249	Mr	Jones/Our Customer Ltd.	Customer Square 1	M35 0NB	Manchest...	United Kingdom	15/08/2020

Single filter value

In this case, all listed documents of the selected document type are filtered by *In progress*.

This value must be found in at least one of the index fields. Otherwise, an empty list is displayed.



Result

Name / Status	Customer number	Title	Customer name	Street	Postcode	City	Country	Document date
In progress	47249	Mrs	Smith/Our Customer Ltd.	Customer Street 1	RH11 7XX	Crawley	United Kingdom	05/05/2020

Example 2

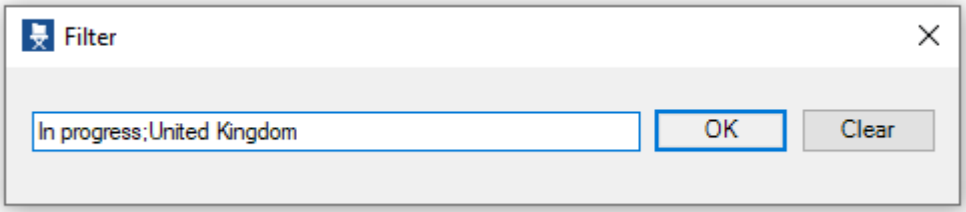
Unfiltered List

Name / Status	Customer number	Title	Customer name	Street	Postcode	City	Country	Document date
In progress	47249	Mrs	Smith/Our Customer Ltd.	Customer Street 1	RH11 7XX	Crawley	United Kingdom	05/05/2020
Archived	94274	Mr	Smith/Our Customer PLC	Customer Street 2	BH19 1BX	Swanage	United Kingdom	06/03/2020
New	47249	Mr	Jones/Our Customer Ltd.	Customer Square 1	M35 0NB	Manchest...	United Kingdom	15/08/2020

Multiple filter values/Keyword lists

In this case, the separator ; is used and all listed documents of the selected document type are filtered by *In progress* OR *United Kingdom*.

At least one of the two given value must be found in at least one of the index fields. Otherwise, an empty list is displayed.



The same search parameter (;) must be used when using the filter option for keyword lists.

Result

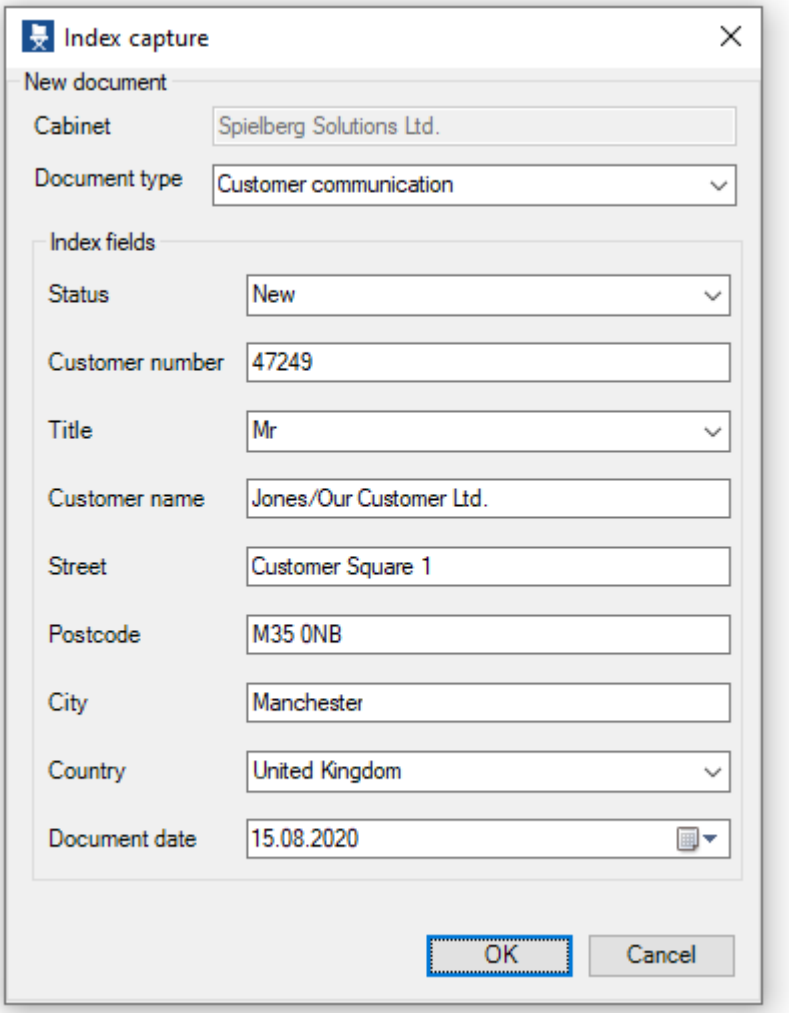
Name / Status	Customer number	Title	Customer name	Street	Postcode	City	Country	Document date
In progress	47249	Mrs	Smith/Our Customer Ltd.	Customer Street 1	RH11 7XX	Crawley	United Kingdom	05/05/2020
Archived	94274	Mr	Smith/Our Customer PLC	Customer Street 2	BH19 1BX	Swanage	United Kingdom	06/03/2020
New	47249	Mr	Jones/Our Customer Ltd.	Customer Square 1	M35 0NB	Manchest...	United Kingdom	15/08/2020

In this case, the list shows both documents as the field *Country* contains the value *United Kingdom* in all three documents, even if the field value in *Status* differs.

Create

New documents can be created by a simple *drag&drop* action to a listed cabinet.

After this, an index capture window is displayed.



After confirmation with *OK*, the document is stored in FileDirector.