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FileDirector 2.0

Enterprise & SBE

Dieter Spielberg DMS GmbH

USER GUIDE

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Working with WinClient

About FileDirector WinClient



FileDirector WinClient is the main application which normal users will call when working with documents in FileDirector cabinets. With FileDirector WinClient documents can be scanned, retrieved and edited.

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

How are documents archived?

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

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

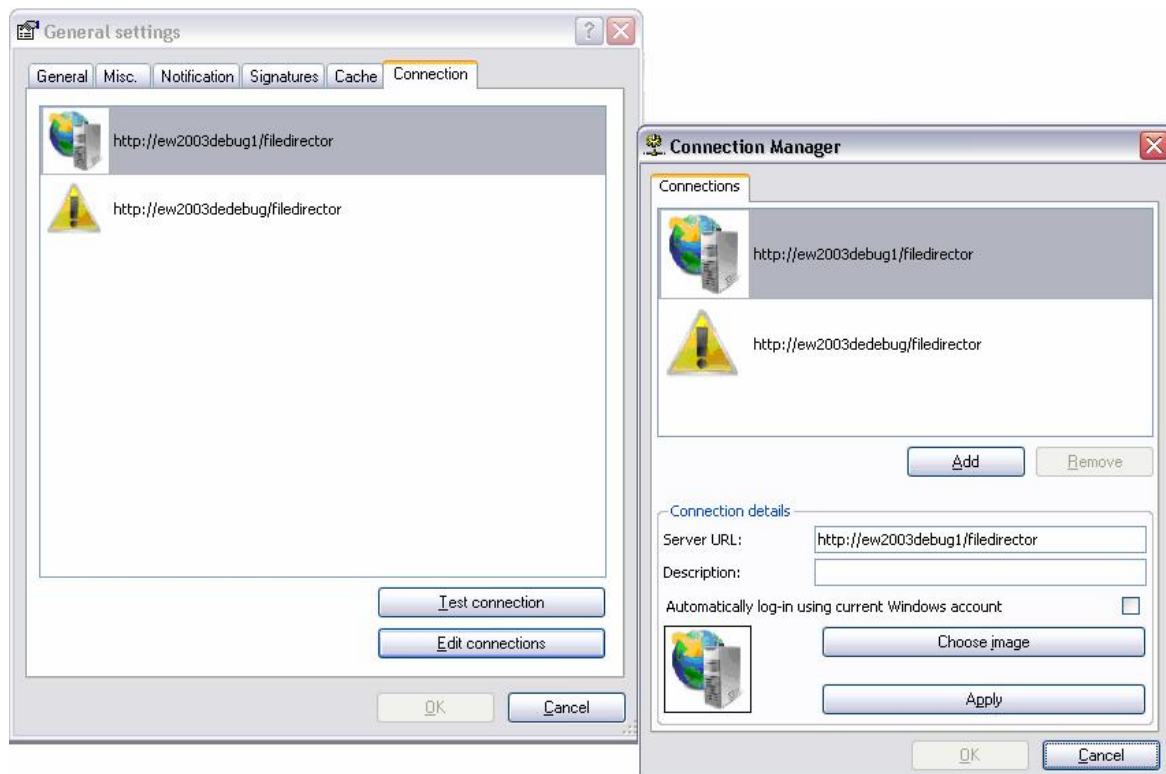
Although a user has access to a cabinet, he is only able to work with those document types in a cabinet to which he was granted access. Additionally different rights can be granted per document type, a user may for example store documents in one document type but is only allowed to retrieve and display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

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

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

Establish connection to the Server

If this window appears when starting FileDirector WinClient you have to specify the connection to the FileDirector server. For the server URL contact your administrator.



More information and explanations about the settings: → [Connection](#)

Using a proxy server

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

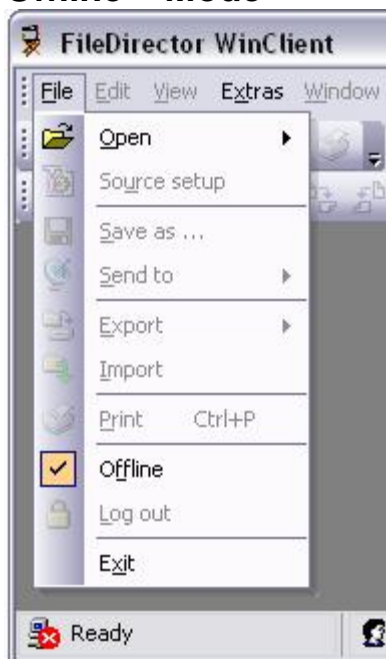
Further details can be found in the chapter → „**Separate Settings in WinClient despite Proxy Settings**“ of the installation manual.

Connected or disconnected (online-/offline)

FileDirector WinClient is a locally installed FileDirector module. This module connects and logs on the server in order to retrieve in a cabinet. Additionally documents can be scanned, indexed and annotations can be stored on documents. Information about the cabinet and the access rights are copied to the local cache of the PC when opening the cabinet for the first time.

[See → Local cache](#)

Offline – Mode



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

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

Work offline with local documents

As from version 1.4 not all pages are downloaded to the local cache to improve the performance if only one page is displayed. At first only the first page is downloaded to the

local cache and then every page which is displayed. If you want to work offline with the document later, all pages of the document must be downloaded to the local cache. In order to do that you must switch the mode to “offline” after downloading the documents (Click on symbol “ready” in the left edge (corner)). If there are uncompleted documents in the local cache, you are asked if you want to download all documents to work offline with them. If you approve (confirm) with “yes”, you can work offline with these documents without connection to the server.

Hint:

Downloaded documents which are not checked out can only be changed and checked in again if they are not revised in the meantime on the server.

Online – Mode



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

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

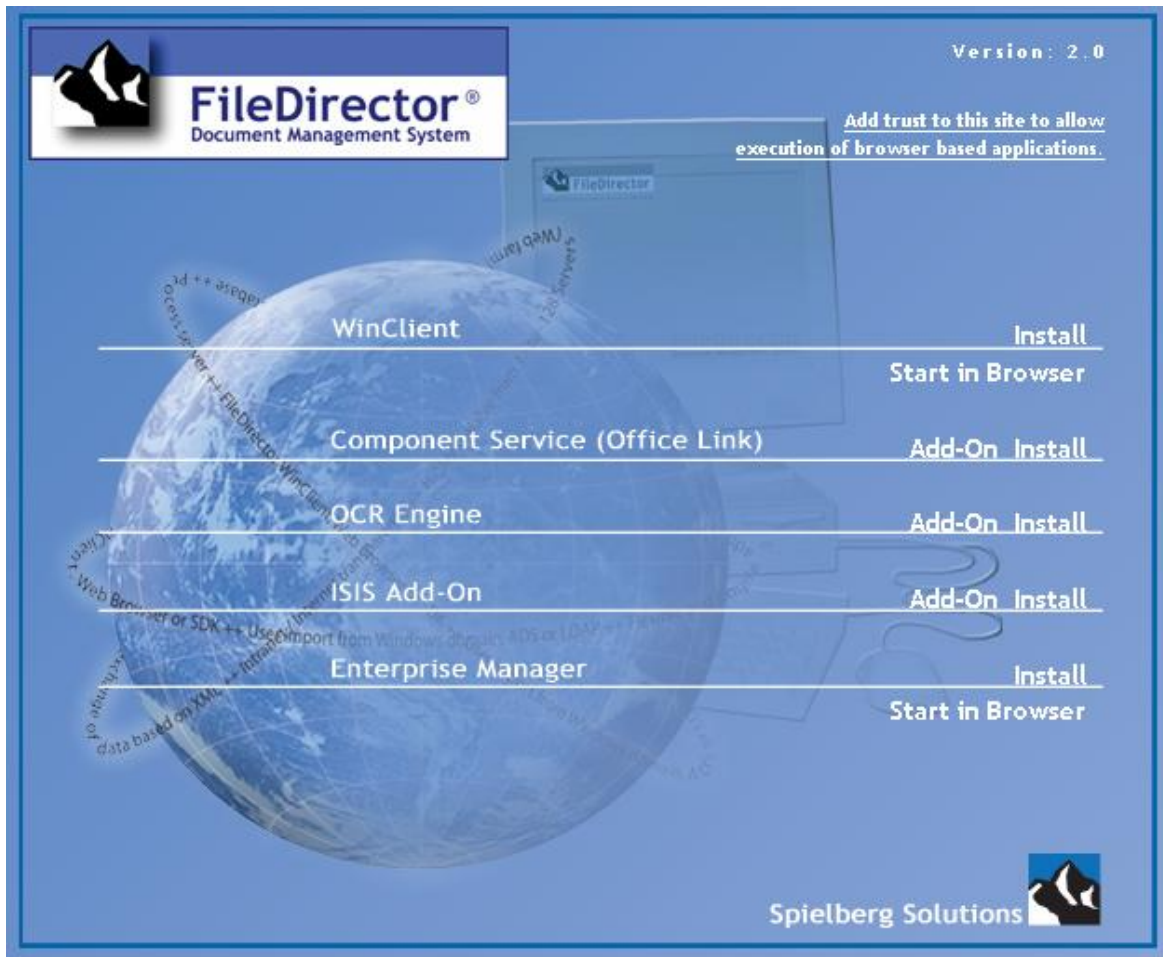
Working with the WinClient in a central server environment

Since version 2.0 there is the possibility of installing the WinClient on the server and starting it by a browser on a client machine. In order for this to work the .NET Framework 2.0 must be installed on the client. The same functions are available as if the WinClient had been directly installed.

The only restriction is that no off-line work is available, since a connection to the server has to be established by the browser in order to start the WinClient.

After the WinClient was correctly installed on the server, the function „Add trust to this site to allow execution of browser based application“ needs to be executed to setup a trust relation to the server.

Afterwards open the installation site ([http://\[servername\]/filedirector](http://[servername]/filedirector)) and execute “Start in browser”. This will call the link [http://\[servername\]/filedirector/WinCWeb/default.htm](http://[servername]/filedirector/WinCWeb/default.htm)




If the WinClient doesn't start on the server this can be caused by the following (please ask your administrator for further information):

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

Controlling of licences

FileDirector uses different groups:

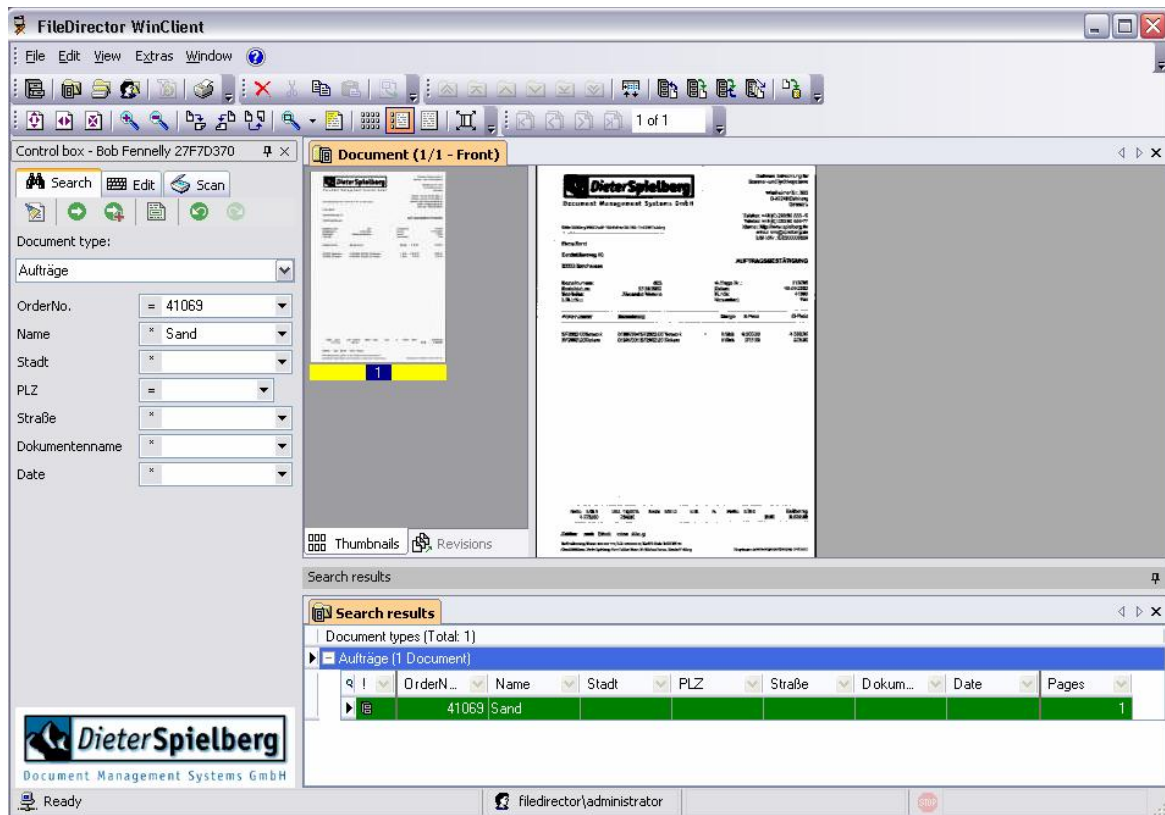
The group fd-admins, fd-scan, (prior:fd-user), fd-scan-named (prior: fd-prio-user), fd-user-named und fd-user (concurrent) (prior::fd-web-user). The users are assigned to these groups from the administrator.

Only as many users can connect to the system and logon as licenses are available. After 30 minutes of idle time (default value, can be specified) WinClient automatically logs off and frees the license for another user. The number of licences can be displayed in WinClient under  → Info. It is possible to specify more users in the FileDirector groups than licences available. In this case it is

possible, that a user cannot connect to the system because all licences are used. Logon will only be possible if another user logs off.

Group fd-prio-user should only contain as many users as Prio-licenses are available. The users specified here have always access to the system; e.g. to scan, index and check in documents for retrieval by other users.

WinClient Desktop



If WinClient is started and a cabinet was opened, a standard menu with icon bars and a control box is displayed. If a search was executed, the result is displayed in a hitlist. If you double click a document in that list, it is displayed in an image display window.

Control box

If you open a FileDirector cabinet, the control box is displayed. In this control box the functions can be executed, which are allowed for the relevant user.

In this box the document types are selected, the relevant index fields then automatically displayed. The tabs of the control box allow switching between Search, Edit and Scan. These tabs can be invisible, if the relevant user is not allowed to execute this function. The icons below change depending on the tab selected and provide the necessary functionalities of that area.

Document lists

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

Search results

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

Local documents

The Local documents list shows documents stored on your local computer, for example new documents, which are not yet checked into the FileDirector server. Documents downloaded from the server are also stored here as local copies. Such a downloaded copy cannot be checked in. Documents which were displayed are downloaded to a local cache.

Hint:

In menu Extras → Options → Cache → Purge cache after program end it is specified, if all displayed documents are automatically deleted when ending WinClient. This does not affect new documents, checked out or downloaded documents. If WinClient is not ended, the cache data are deleted automatically after 12 hours, if this option is ticked.

Personal folder

The list of the personal folder contains documents which were sent to you by other FileDirector users or which have been sent automatically to you by a process if your account is part of a process step.

Document display / Display window

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

Editing of pages is executed in display window as well, if allowed for you. Annotations can be added or pages revised.

Hint:

The document actually displayed is always marked green in the document lists.

Arrange windows

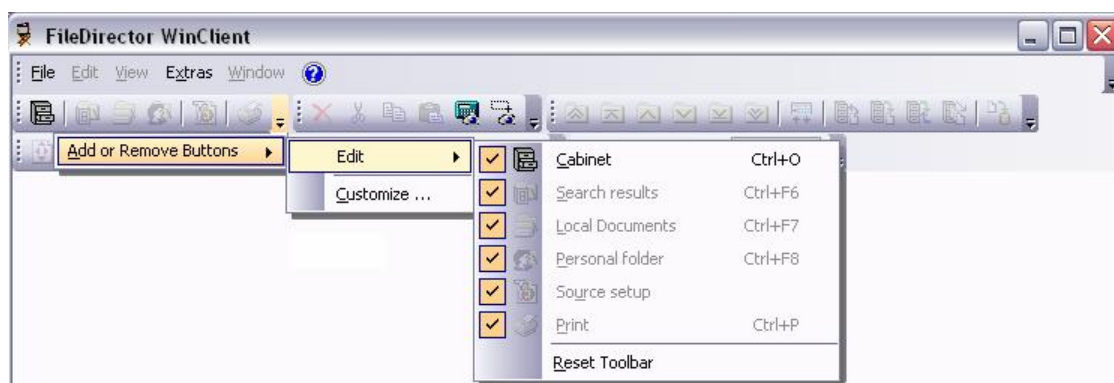


In order to arrange control box, document display and document lists clearly, a fixed arrangement can be selected in menu **Windows**.

In section [Arrange tabs](#) more possibilities are listed to setup the desktop of your installation.

Setup button bars

The setup of the button bars can be defined, if it is allowed for the relevant user. The rights are predefined from administrator. The administrator can predefine the menus and the options for the users, so that no changes are allowed for the client.



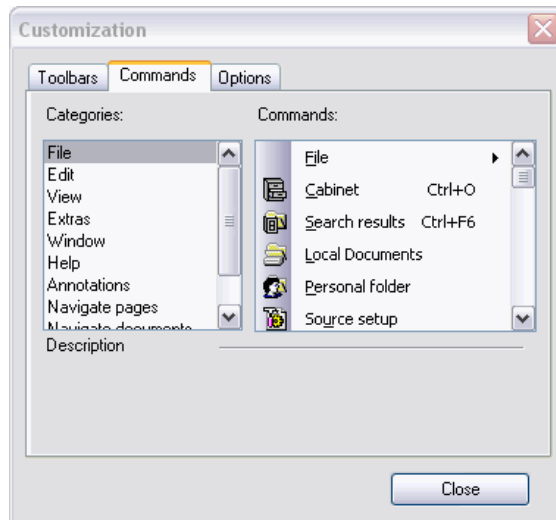
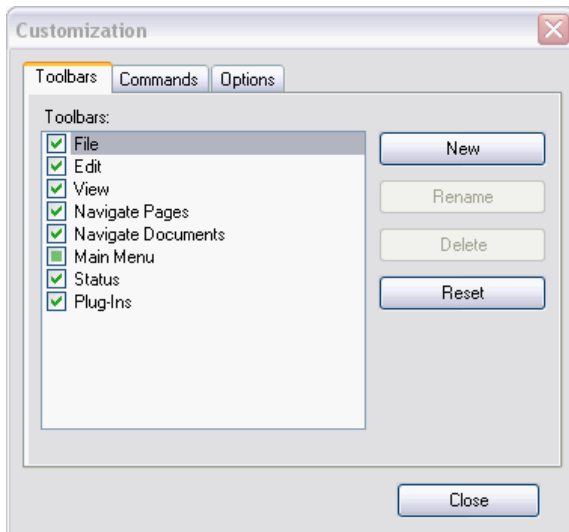
If there are small arrows between the button bars, a fast arrangement can be specified. If no arrows exist, it is possible (if rights are sufficient) to call the setup menu by double clicking the free area of that bar.

Switch button bars on and off:

Click to the arrow of the relevant button bar → **Add or remove buttons** → **Edit** and set or remove the tick in front of the relevant button bar.

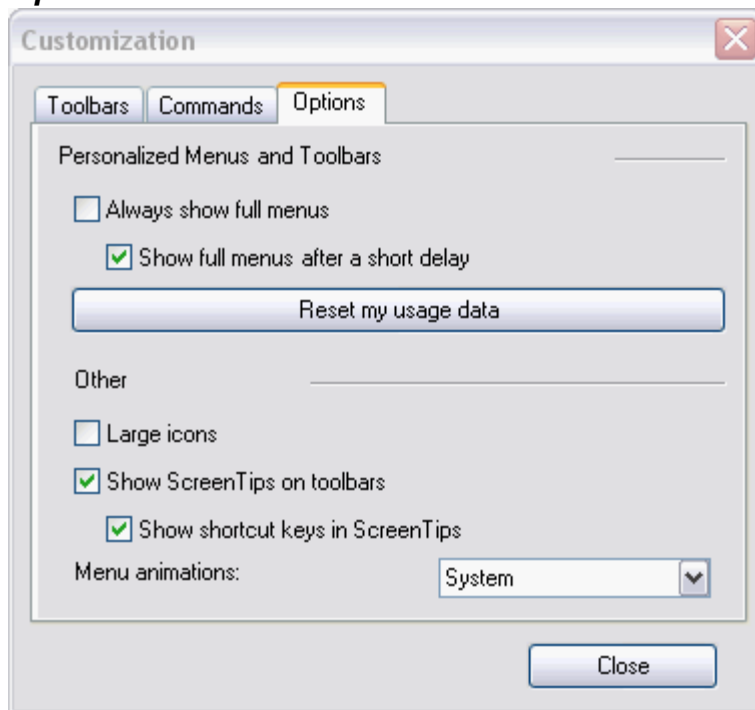
Create own button bar:

Click to the arrow of a button bar → **Add or remove buttons** → **Customize...**



In tab **Toolbars** a new toolbar is created by clicking to **New**. A new empty toolbar is created in your menu. In tab “**Commands**” commands can be selected and added to the toolbar by drag and drop.

Options for toolbars



Specify under **Options** if menus are always displayed completely or if they should only be displayed after a short delay. If the buttons appear too small on your screen – because you are using a very high screen resolution - you can switch to display **Big Icons**.

Tooltips can automatically be shown on toolbars if the mouse cursor stays a little bit on a button. This can be switched on and off here. Additionally short cuts can be displayed for the single buttons.

First steps

Open cabinet

A cabinet can be opened automatically or manually if WinClient was started. If WinClient is started connected to the server (Online mode) and a cabinet is opened, the settings of that cabinet are downloaded to the local cache.

Open cabinet manually



When clicking **File** → **Open** → **Cabinet** a list of the available cabinets for the logged in user is displayed. Either double click on the cabinet to be opened or select the cabinet in that list and click to **OK**.

Open cabinet automatically

WinClient can open automatically the cabinet last used. This option must be active and can be set in menu **Extras** → **Options**, tab **General**, Checkbox **Open last used cabinet**.

Open document list

When opening a cabinet the list of local documents is displayed automatically. If a document list is opened, the display can be refreshed in menu **View** by selecting **Refresh**.

Search results



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

Hint:

A setting on the server limits the maximum number of documents to be listed on a document list to 1000 entries. This default value can be changed by an administrator in file "web.config".

See → Installation Guide

Local Documents



The list of local documents can be opened by selecting **Local documents** in menu **File** → **Open**.

Personal folder



The personal folder list can be opened by selecting **Personal folder** in menu **File** → **Open**.

Closing of document lists

A document list can be closed in the upper right corner of the actual list displayed.

Searching in Cabinets

General concerning searching



A search operation for documents in a cabinet is performed after selecting tab **Search** of the control panel. The search operation can either be carried out in one document type only or over all document types of a cabinet. Another possibility is full text searching if the documents have been processed with OCR. The optional OCR module is necessary and the generation of a full text index must be configured on the server by an administrator.

A comprehensive search over several cabinets is not intended.

Clear index fields



The actual display of index information in the index fields can be cleared before entering new search criteria by clicking to button **Clear Index fields**.

Start search



After entering search information into the fields start search by clicking to button **Start Search (Ctrl-S)**.

The following search option can be called (selected) by the drop down list.

Start extended search



You can search over all document types of a cabinet to which you have sufficient access rights. Start search by clicking button **Start extended search**.

Info Search





With Info search properties of a document can be retrieved, which are automatically saved as info with the document. The following properties are supported in the search algorithm:

Created by

Created on
Changed by
Changed on
Checked-out by
Checked-out on
Status

When calling this option the relevant entry fields for these properties appear in the toolbox below the normal index fields of the selected document type. This option can be activated in Extras → Info Search.

Start full text search

Full text search over documents which have been OCR processed can be started by clicking button **Full text Search** . After entering of the relevant word the full text search is started after clicking button **Search**  next to the text field.

In order to receive results in a full text search the OCR full text option must be licensed and configured on the server. Reading of full text information is executed by a scheduler, which starts in defined time intervals. Depending on this scheduler and the generation of the full text index in the SQL server the results of full text reading may for example only be available on the next day.

Hint:

a) In version 1.2.6 and later the content of the normal index fields is also written to the full text index. Therefore the contents of an index field can also be found by using full text search.

b) In version 1.5.1 and later the content of the index fields are only written to the full text of the first page of a document.





Search history



Previous Search



Next Search

The search criteria entered during a session are stored in FileDirector. Therefore a user may browse through search operations already carried out in this session and reuse them. Select the relevant search information by browsing through the stored list with buttons **Previous Search** or **Next Search**. Watch for the entries in the index fields changing according to the list. Afterwards start the relevant search with clicking  for a specific document search in a document type, with clicking  as a comprehensive search, or as a full text search with  and  next to the text field.



Search parameter

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

Parameter	Description
~	Allows wildcard search
=	Exact match
>	Greater than value specified
>=	Greater or equal value specified
<	Smaller than value specified
<=	Smaller or equal value specified
=()	Search for all documents with index field empty
<>()	Search for all documents with index field filled
..	Search From - To
	Using this option two values have to be specified, a lower and an upper limitation for a range search.

Searching using index fields

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

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

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

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

Search using OR combinations

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

Example:

A document was filed under a name like "Grey". If the user does not know how the index is spelled exactly, he can enter the several possibilities:

Grey Gray Graye

In this case the search is carried out for all single words entered; however they have to be stored at the beginning of the index field.

If a document was stored under “**John Grey**”, it would not be listed with this search operation. In this case the search operation can only be performed with a wildcard search: “***Grey**”.

Hint:

When using an oracle database this function is not available.

*Normally only an asterisk * is attached*

Input assistance for index entry

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

Example:

A search with „mi“ will not render Smith as result, it will only render all documents beginning with „mi“.In order to have „Smith“as a hit, 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.

Hint:

*The asterisk * as a wildcard is only valid when SQL server 2000 is used as database backend. Using Oracle a % character must be used for wildcard search.*

Search in inverted commas

To ensure that a search in WinClient or WebServer is always done with automatic inverted commas you can set the following entry in the web.config ("0" = off, "1" = on):

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

Hint:

Please ask your administrator for configuration because this is a general setting on the server.

MRU-Lists

With the MRU-Lists (most-recently-used) the entries are listed which were already entered before. So it's possible to repeat the entries without typing in again the word. With the keyboard this list can be opened with ALT ↓. With the mouse you can drop down the list with the arrow at the right side of the indexfield.

Clear MRU list

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

Keyword lists

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

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

In Version 1.2.3 and later several keywords can be selected simultaneously by checking them in a drop down list. They are entered into the index fields separated by semi colons.



The control box displays fields which are connected to keyword lists with this symbol.

Hint:

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.

Usage of shortcuts in Keyword lists

In order to be able to select the words windows conformal and using the shortcuts anyway you must use a semicolon behind your input if the entries are not unique.

Example:

In the wordlist are names listed like e.g. „Michael Eskamp” (Shortcut ME) and “Maria Immenfeld” (Shortcut MI). If “MI” is entered the name “Michael” will appear, because the first two letters are searched windows conform. If the shortcut is entered with semicolon “MI;” the entry “Maria Immenfeld” will be found.

Date entry

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



The control box displays fields which contain dates with this symbol.

Memo fields



If a field is configured as a memo field, this symbol is displayed next to the index field. A field of type memo allows nearly unlimited characters to be entered.

ODBC database links *

Using ODBC links index fields can automatically be filled if a unique index value is specified in a certain index field.

If for example a client number is entered, the relevant address information can automatically be added from a connected database to the index in **Edit** mode. The connection of index fields to a database must be configured as an ODBC connection on the server by an administrator user.



Manual indexing using OCR zone recognition

If OCR zone recognition is licensed on the server, it can be used as an assisting tool for manual indexing. The manual OCR zone recognition must be installed as an additional plug-in.

See section → [Point and Shoot](#) in plug-ins.

Full text search

The content of documents can be searched in order to retrieve a document which contains certain words or phrases. This can only be achieved, if the documents were processed with the optional FileDirector OCR module. The OCR full text module can be configured to process only 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 do full text retrieval, select tab **Search** of the control panel. Select the document type and activate the text field which is used to enter search information by clicking to **Full text search** . To start full text search enter the word(s) and click to button **Search**  next to the text field.

Searching multiple words in full text using AND, OR, OR NOT

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

AND - function:

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

OR function:

For example invoices or credits are archived in a document type. When searching „invoice OR credit“, all pages are found – either containing the word invoice OR credit.

OR NOT function:

When looking up e.g. „invoice OR NOT Mueller“, all invoices are listed NOT containing the name Mueller.

Full text search combined with index fields

When a full text is searched for a term, you can search in combination with index fields in version 1.5.1 or later. If you fill out the index fields additionally to the full text search, you will limit the result of the search.

Hint:

When you perform a search for a term in the full text which is also to be found in one of the index fields, it might happen that a page will be displayed that does not include the term in the text on the displayed page. The reason is that index data will be additionally written to the full text. Thereby it is possible to find documents via index terms additionally via the full text.

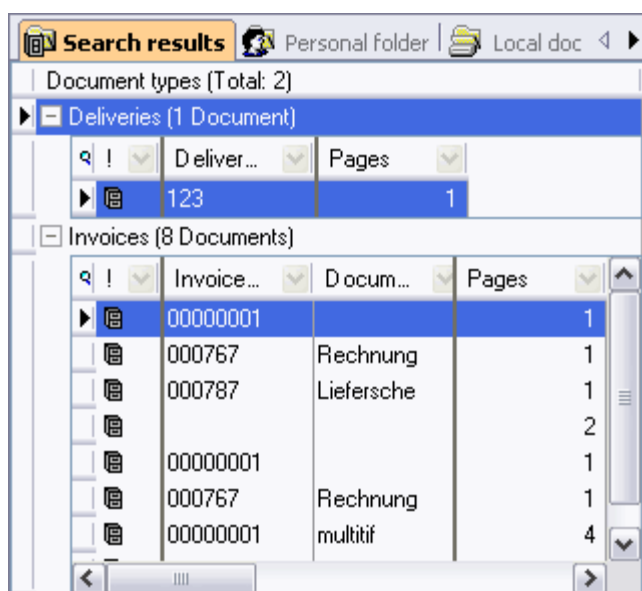
Document lists

Types of document lists

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

Search results


After a successful search operation the results are displayed on the search list. If this list is already open, it is updated with the relevant results. This list can only be displayed, if a connection is established to the FileDirector server.



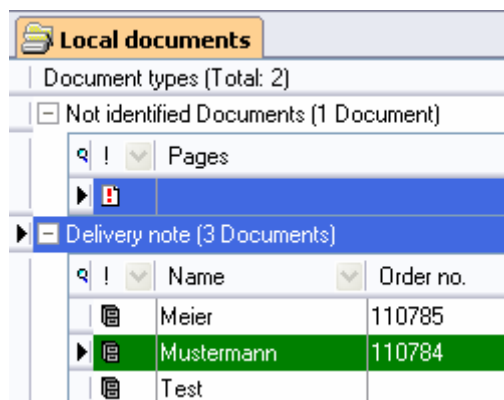
If the search was performed in one document type, only documents stored in this particular document type are listed. If the search was performed over all document types assigned to the relevant user, the search result is listed separately for each document type as displayed above. The name of the document type and the number of documents found is displayed. For each document the document status is displayed giving you a quick overview, which documents are available and which documents have been checked out by other users or yourself.

The document list can be sorted within each document type by clicking the relevant column header. Documents are displayed by double clicking to the relevant hitlist line.

Local documents

The local document list is opened by clicking button  in the toolbar or by selecting entry **Open** in menu **File**. The documents displayed in this list are stored locally on the computer.

Only documents are displayed on the local list, which are displayed by the actual user, which was checked out by him, which were downloaded or created new.




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

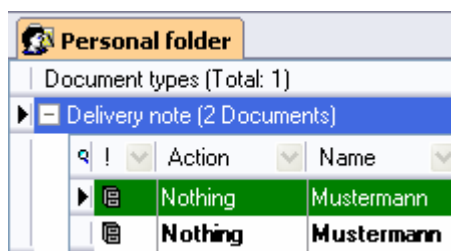
Accordingly documents which were checked out and documents, from which a local copy was created are displayed in the local document list. For each document the document status is displayed giving you a quick overview, which documents are available and which documents have been checked out by other users or yourself. The document list can be sorted within each document type by clicking the relevant column header. Documents are displayed by double clicking to the relevant hitlist line.

The arrow displayed in the column header additionally allows specifying display filters. (All, custom, blanks, no blanks, archived). With setting **Custom** a list can be sorted so that entries greater equal and smaller equal are filtered out.

[See → Set filter for document display](#)

Personal list

The local document list is opened by clicking button  in the toolbar or by selecting entry **Open** in menu **File**. The documents displayed in this list are sent to you by other FileDirector users or are sent automatically by processes if you were specified as a recipient in a process designed in module process management.



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

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

For each document of the list an action can be specified by process management. This can be a task like 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 to the relevant hitlist line.

If a document is received, the personal list must be refreshed. In **Extras** → **Options** → **Notification** an automatically notification can be specified if a new document arrives on the personal list. When pressing F5 the refreshing is performed manually.


Hint:

Please note, that during the specified scheduled intervals a contact is established to the server and the client license is not returned as long as WinClient runs.


Document status

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

Status New

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


Status Archived

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


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

[See also → General settings/Options](#)

Status Checked out

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

Status Read only


Documents displayed with status **Read only**  are currently checked out from 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.

Hint:



*In urgent cases (for example: checked out documents are stored on a hard disk which is damaged) this status can be reset by an administrator by clicking **Undo Check-out**.*

ATTENTION: Check-In of previously checked out documents is not possible anymore! They must be deleted from the local list and must be checked out again for editing.

Send

Status **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 was finished. This status can appear in all three document lists.

Deleted

The deleted documents from the server can be shown with the status , by switching on the info search in Extras → Options → Info Search and selecting the entry “deleted” in the field “status”. If you run a search now, the deleted documents are shown and they can be undeleted with the right mouse context menu command .

Status

In the field „status” on the local document list appears e.g. hints for checkin errors. These hints can be false entered mandatory fields or a field that should be checked of validity by the server (e.g. if a valid date is used).

Hint:

*The behaviour during Check-In and Check-Out strongly depends on various settings. Under **Extras** → **Options** → **General** different automatic actions can be configured. See section: [Check In and Check Out](#)*

Display modes of document lists


Handling of document types lists

Standard 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.


Switch to detailed display

With button **Toggle detail view**  the display is toggled between detailed view and list view of the document types.


Drop down document list

To drop down a document type list, click to button , which is located left to the document type name.


Minimise document type list

To minimize a document type in a document list, click to button , which is located left to the document type name.

Display only one document type



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

Display all document types

To display all document types in the list click to symbol  left to the column headers of the document type.

Handling of lists for document display

Sort ascending/descending inside of a document type

The documents in a list of document types can be sorted by any column. Click to the relevant column. Another click to this column header toggles the sort order. Alternatively Sort **ascending**  or **Sort descending**  can be selected in the context menu which opens when right clicking to the column header.

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

Changing the column order

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


Changing the column width

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

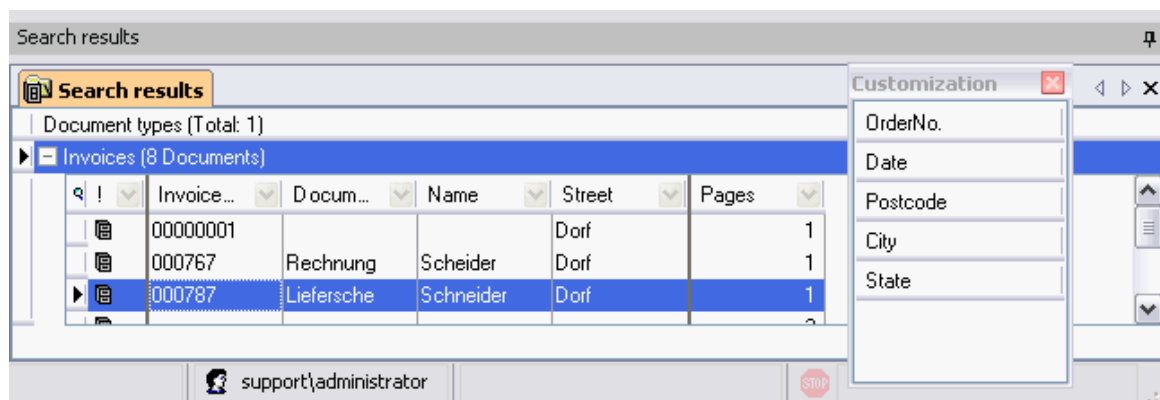
Method 1:

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

Method 2:


Move mouse cursor to the column header of the column to be changed, open the context menu by right click and 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.

Fit columns during run-time




If a document type uses a great number of columns, they may be unreadable because they are too narrow depending on monitor size and resolution. It is possible to select only certain columns for display and make others temporarily invisible. Use **Runtime Column Customization** in the context menu of the column header. A small window appears into which columns can be dropped by a drag and drop operation. They are not displayed anymore. In order to display all columns again, minimize the list and afterwards change to detailed view.

Open list

To open a group of columns for document display, click to , which is located left to the document type name.

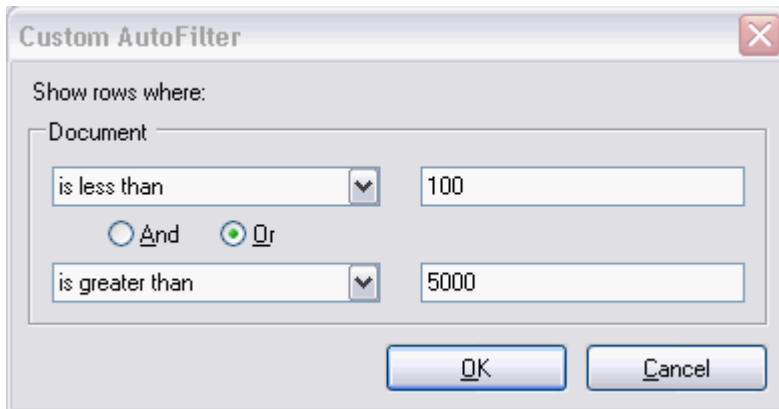
Minimize list

To close a group of columns in order to hide document display, click to , which is located left to the document type name.

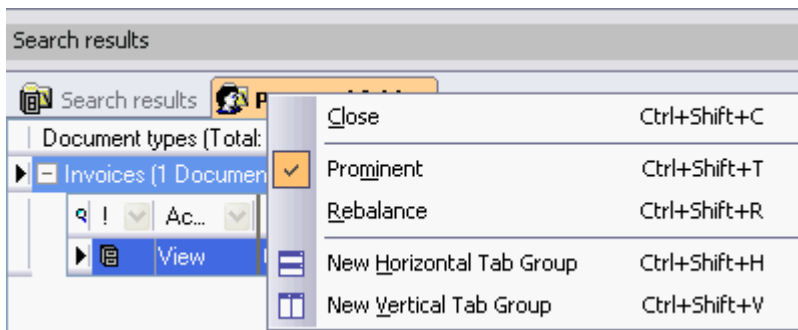
Set filter for resulting list

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

Additionally, custom specific filters can be configured which can filter the index values of a column for certain ranges:

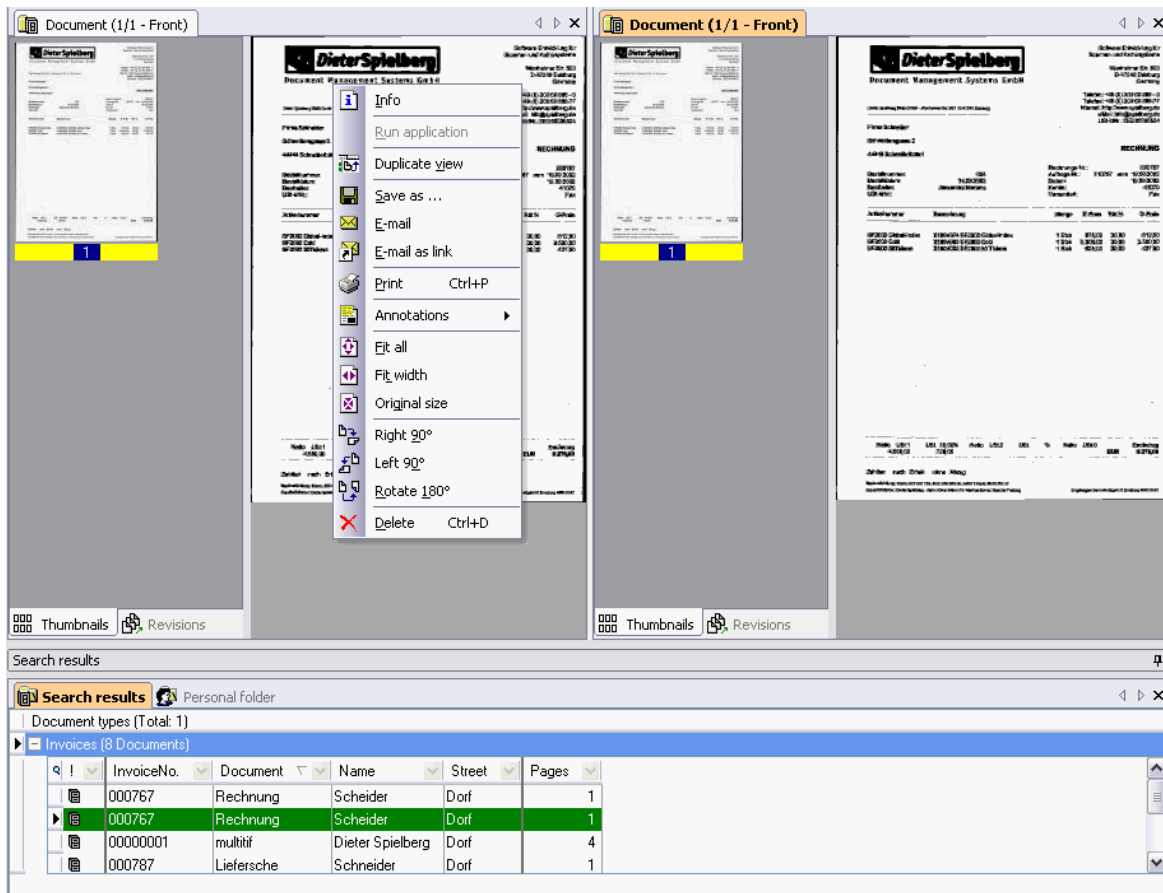


Arrange Tabs / Display lists side by side



In order to display document list more clearly, 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 in context menu (right mouse click). Select in context menu **New horizontal tab group** or **New vertical tab group**. A new area appears with the document list marked before. The lists can be moved by drag and drop from one group to the other or with the context menu with **Move to previous/next tab group**.

View documents side by side



By arrangement of different tab groups several documents can be displayed side by side for comparison. When opening the context menu of the document display (right mouse button) a second display window can be opened by **Duplicate display**. If the display is duplicated in a different tab group, documents can be displayed side by side.

Method:

Retrieve a document from a list and display it.

Click to **Duplicate display** in context menu (right mouse button)
 Now retrieve a different document and display it in the second display window.
 Select the tab in the document display and create a second tab group for the image display window.

Now the different documents can be viewed and compared in different document display windows.

Display of documents

About documents

A document in FileDirector is either a one page or a multipage document. Additionally to the pages index data are stored to a document, which are listed in the document list. One page can either be represented by a scanned page or by a file in its original file format like for example MS Word or Excel (Edocs).

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

If **FileDirector Component Service** is installed, WinClient is able to display more than 200 different file formats including all Microsoft Office formats and several CAD drawing formats (electronic documents/Edocs).

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

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

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


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

Display options


The display window has three settings. You can display the current page together with the thumbnails (default setting). The display mode can be switched to display only the thumbnails for fast document overview or to display only the current page without the thumbnails.

The display window can be moved and resized to the proper size.


Display thumbnails and image

Select  from the toolbar **Display** in order to display the thumbnails alongside the current page.

Display only thumbnails

Select  from the toolbar **Display** in order to display only the thumbnails overview in the display window.

Display only image

Select  from the toolbar **Display** in order to display only the current page in the display window.

Toggle between thumbnail view and page display

You can toggle display mode between **Page with thumbnails** and **Page only** by a double click on the display window.

Thumbnail view

Scroll with mouse wheel

If you use a wheel mouse you can scroll with this wheel through the thumbnails.

Selection of single pages

If only certain pages of a document should be selected, this is done in the thumbnail view. Several pages of a document can be selected for example for printing and sending by Email.

Select document for display/navigate

If a document list is displayed, it is displayed by a double click on the relevant line of this list. The display window opens and displays the relevant document. With the following commands of the display toolbar navigation through the documents is performed:



Display first document of document type



Display last document of document type



Display previous document of document type



Display next document of document type



Display first document of previous document type



Display first document of next document type

Select page of document for display

If the first document is opened, automatically the first page of this document is displayed together with the thumbnail view.

You can browse through the pages (also with mouse wheel) or select the relevant page in the thumbnails or use the buttons in toolbar ***Browse through documents.***

Entering of page number





You can enter the relevant page number directly by keyboard into the page number box in the toolbar ***Browse through documents.***

Select page in thumbnail view

If the thumbnails are displayed together with the current page click on the relevant page in order to display it.

If only thumbnails are displayed double click on the relevant page in order to display it.

In order to browse through the pages of a document the following buttons from toolbar Browse through pages:


-  **Display first page of a document**
-  **Display last page of a document**
-  **Display previous page of a document**
-  **Display next page of a document**

Tools for page display

The display of a document within the image display window can be changed and arranged for example by zoom and rotation.


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

Display whole page in the image display window

Select  from toolbar **Display** in order to fit the displayed page into the image display window.


This is also possible in the context menu which opens up by a right click on the image display window.

Fit width of page to the document display window

Select  from toolbar **Display** in order to fit the width of the displayed page to the image display window.


This is also possible in context menu which opens up by a right click on the image display window.

Display page in original size


Select  from toolbar **Display** in order to display an image with maximum zoom. When displaying TIF or JPEG files, each pixel of the image is displayed as one screen pixel.

This is also possible in context menu which opens up by a right click on the image display window.

Zoom in

Select  from toolbar **Display** to increase the zoom factor in order to increase the displayed image.


Zoom out

Select  from toolbar **Display** in order decrease the zoom factor in order to decrease the displayed image.

Display selected part of an image


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

Rotate page 90° counter clockwise

Select  from toolbar **Display** in order to rotate the displayed page 90° count clockwise based on the current view.


This is also possible in context menu which opens up by a right click on the image display window.

Rotate page 90° counter clockwise

Select  from toolbar **Display** in order to rotate the displayed page 90° clockwise based on the current view.

This is also possible in context menu which opens up by a right click on the image display window.

Rotate page 180°

Select  from toolbar **Display** in order to rotate the displayed page 180° based on the current view.


This is also possible in context menu which opens up by a right click on the image display window.

Hint:

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




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

Maximize document viewing area

 With this option the page can be displayed in fullscreen mode. You can switch fast between the different views for better reading the text of the documents with the key F12.

Selecting documents

Among the general selecting procedures you can use different commands from the right mouse menu. To choose all documents you use the shortcut Ctrl +A or

-  Select All from the context menu
-  Toggle or Strg +T to invert the selection of chosen documents
-  Remove or Strg +R erase the selection of documents.

Check In and Check Out

Why check in or check out documents


New documents are stored locally on the workstation on the local document list. They are not available for other users until they have been checked in on the FileDirector server into the relevant cabinet. Afterwards the document is stored in the cabinet and is available retrieval. If you want to edit a document which is stored in a cabinet you have to check it out first.

Only then it is possible to change a document and the system ensures, that nobody can change it while it is checked out. But a checked out document can be retrieved, the system will show the unchanged version in read-only mode. Each change of a document is only stored in the cabinet and available for the other users, if the document was checked in again after the changes.

Check In documents

Documents with status New are stored locally on the work station and are not stored in the FileDirector cabinet. They are listed on the local document list. Documents with status Checked Out are always displayed on the local document list and eventually also on the **Search** list depending on the search criteria used.

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

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

This can be done by a button in toolbar Browse through documents or in context menu (right mouse button) if the document to be checked in is selected in the document list.

When checking in, the document is sent to the server where it is available for retrieval.

Automatic check in / Setting in Options

Documents can automatically be checked in after editing index data. This can be specified for new documents or checked out documents.

The automatic check in can be set via menu Extras → Options in tab General. The following options have influence on the check in of documents:

Delete new documents after check in

A new document is stored on the local document list of the user. When this option is set, the document is automatically deleted from the local list when the document is checked in. If this option is not set, the document remains on the local list with status “Archived” and must afterwards be deleted manually.

Delete revised documents after check in

An already archived document which was checked out appears on the local list of the user. When this option is set, a document with status “checked out” is deleted from the local list when being checked in again. If this option is not set, the document remains on the local list with status “Archived” and must afterwards be deleted manually.

Do not remove from list

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

Auto. Check in of new documents

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

Auto. Check in of new documents after index edit

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

Auto. Check in of archived documents after index edit

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

Remind to check in new documents after program end

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

Remind to check in documents after program end

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

Hint:

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

[See also: General settings / Options](#)

Mandatory fields and test during check in



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

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

Protected fields

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


Cancel Check in of several documents



Several documents can be selected and checked in simultaneously. The status bar at the bottom of the WinClient window displays status information. The left progress bar shows the progress over all documents to be checked in. The right progress bar shows the progress of the current document. A Stop button is located between the progress bars which Stops check in process. This button is useful if check in of a very large document takes too long and should be stopped.


Check out documents

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

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

Undo Check out

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

Select Undo Check Out  from the toolbar in order to reset Check out for the selected documents.

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

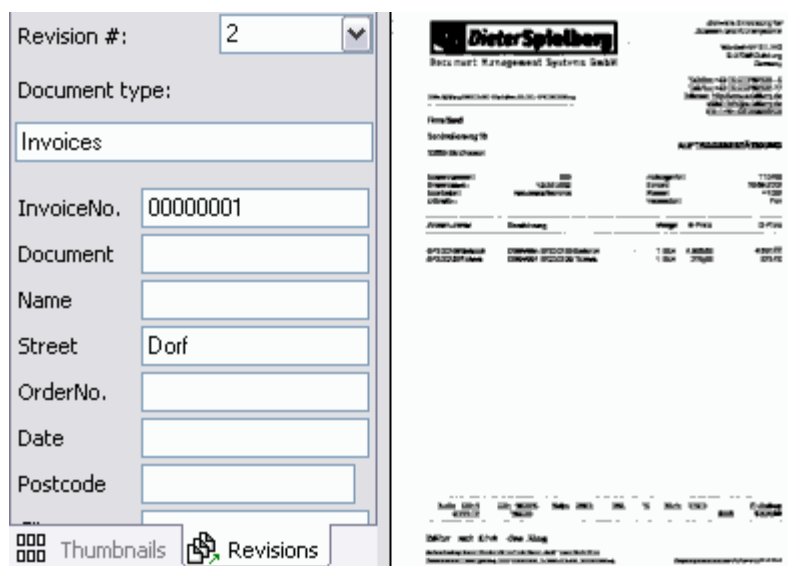
Hint:

In urgent cases checked out documents (for example if they are stored on a damaged hard disk) with status "Read only" can be checked in again with "Undo Check out" by an administrator user.

ATTENTION: In this case checking in of documents previously checked out is not possible anymore. They have to be deleted from the local list and checked out again if they should be changed.

Revisions

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



Display Revisions

The displaying of revisions is protected and must be granted as a right. To display the revisions click to tab Revisions. This tab only appears if revisions are stored to the local documents. The tab appears in the thumbnail part of the display window. With the drop down list you can select and display the different revision in order to recall the document changes. Changing of the document index is also stored as a revision.

Change Revision/ Check out

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

Delete revision

Revision cannot be deleted.

Print Revisions

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

To print the current page select the current pin the document display and select the Print command there. What is being printed always depends on the current selection.

Document type without revisions (mail box)

If a document type is set up as a mail box from administrator, it does not create revisions. If a document should have changes that should be recalled later, it must first be moved to a normal target document type.

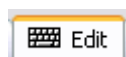
How is a revision stored?

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

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

Editing of documents

Editing - General



Existing documents can be edited in many ways. It depends if it is an archived document in a cabinet or a new document on a local list.

If a document may be changed depends on the access rights of the relevant user.

Scan options contain the appending and inserting of pages to existing documents, pages can be edited by adding annotations to the pages.

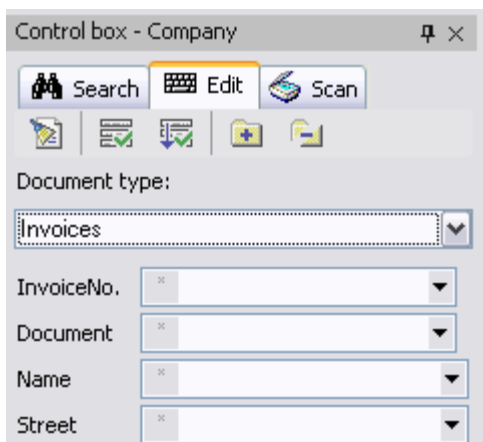
Additionally index information of documents can be changed, whole documents or single pages of a document can be deleted, documents can be combined or documents can be split.

Editing of document-index information

Index information stored to a document can be appended or edited at any time.

The relevant user must have the right to change documents.

The editing of index is done in 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 was already checked in to a document type is stored as a revision after checking in again.


Hint

If a document type was configured by an administrator as a mail box, no revisions are created. This is a general property of a mail box.


Editing of index data for a document

Select the document to be edited in the document list. If the document was already archived you can display it after retrieving it.

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

Click to. **Execute changes**  in order to carry out the changes.

Moving of a document to a different document type



To move a document into a different document type is done exactly as described before in editing of index. The only difference is that first the document has to be selected, then the target document type has to be set and the index fields are changed or filled. With **Execute changes**  the document is moved to the target document type with the index information specified.

Editing of index for several documents

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

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

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

Click to **Execute changes**  and go to the next document to change or add index. Do this by clicking to the next document of the list or use **Execute changes and go to next document** ; in this case the system automatically jumps to the next document on the list.

During editing the listed values remain in the WinClient for the next document to be focuses in the control bay, if the entry

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


is set in the file app.xml. If this setting is applied to the WinClient only, it will be overwritten with the next update.

If this setting must remain after an update, it must be changed by an administrator on the server. This option for the rollout can be set in setups\WinClient\app.xml on the server for all following Clients installed on the server.

Simultaneous changing of an index field for several documents

In version 1.2.2 and later the content of an index field is displayed yellow in the control box when it is edited. This denotes, which index fields have been changed. In order to change the index of several documents simultaneously, select the documents to be changed edit the index field and click to Save changes. The changed index is now taken over for all selected documents.

Indexing with keyboard

If you want to index using keyboard only, you can jump from one index field to the next by hitting "Return". If "Return" is entered when positioned in the last index field, the focus jumps to the button **Execute changes and go to next document**  another "Return" executes this button. In this case the focus immediately jumps to the next document of the list and does not have to be selected manually.

Hint:

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

Copy and move with drag & drop

Move pages in one document

To move pages in one document, the pages are selected in the thumbnail view and with (by) holding left mouse button moved to the target position.

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

Move pages from one document to another

If one page must be moved from the current document in 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 be moved to the final position in the document there.

Copy a whole document in an other document

A whole document can be copied by selecting it on the hitlist and move it with pressed left mouse button onto another document.

The original archived document remains unaffected because of the auditing acceptability and if necessary it can be deleted.

Copying selected pages

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

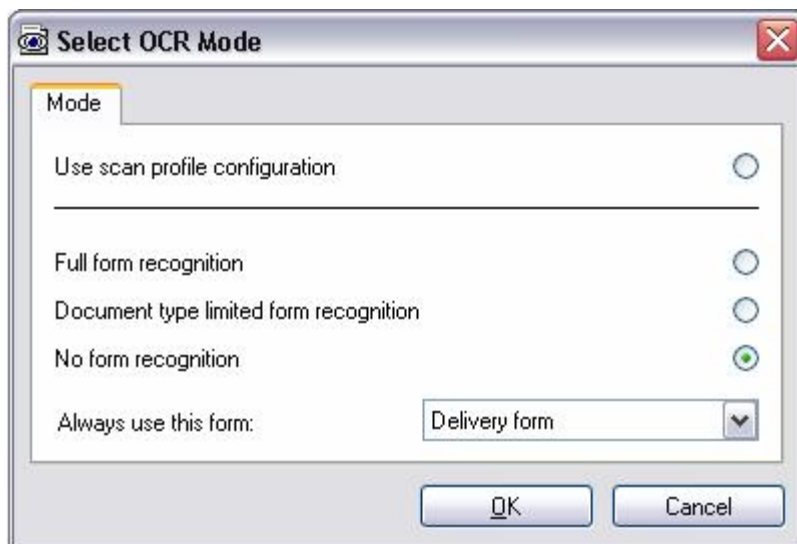
Creating a link to a document in a Windows-directory

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

Hint:

Please keep in mind that the link remains on the page even if the file does not exist any longer in the specified path.

Indexing with predefined OCR forms



If a document shall be indexed automatically, there must be predefined forms with OCR zones in the Enterprise Manager. From these zones the content will be read and written into the index fields.

In the normal case the OCR mode is deposited to a scan profile to run the OCR recognition during the scanning process.

If a form is configured after the documents were scanned, it is possible to run the OCR recognition by selecting the documents in the WinClient and start the OCR recognition with (by selecting) Edit → OCR Document on existing documents.

Use Scanprofile Configuration

With this option the settings are used which are configured in the scanprofile the document is scanned with.

Full form recognition

With this setting all forms are checked for identifier, which are activated in the Enterprise Manager and the documents are identified and 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 a faster and better recognition.

No form recognition - Always use this form

If „No form recognition“ is selected, a special document can be chosen, which is used for the recognition. Is an identifier configured, the recognition for separating sheets pages can be used during the batch scan.

Add columns

By pressing the right mouse button a context menu opens where you can add columns for checking sums. Select the documents which contain a numeric value in a column which is to add and call the command with the context menu over the column. Now the result of the addition is shown in a separate window.


Automatic check in of documents

If index data have to be stored to archived documents the document has to be checked out and afterwards checked in to save the new information to the cabinet. This process can be enhanced and made more efficient if in menu **Extras** -> **Options** under tab **General** the check box **Auto. Check in of archived documents after index edit** is set. The editing action is finished after the document has been checked in again and its status has again changed to **Archived**.

If the document has status **New**, it can be automatically being checked in if in menu **Extras** -> **Options** under tab **General** the check box **Auto. Check in of new documents after index edit** is set. The status will automatically change to **Archived** if the automatic check in option was selected.

[See also → Check in documents](#)

Combine documents

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

Combining of archived documents

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

If documents with status **Archived** are combined, the appended original documents are not deleted, because it must be possible to recover the history of the documents. If these documents should be deleted this must be carried out as an extra action.

Combining of new documents

If documents with status **New** are combined, the appended documents can be deleted afterwards because it was not archived on the server.

Combining of new and archived documents

If documents with status **New** and status **Archived** should be combined, the archived document must be retrieved and checked out first. After check out it is stored on the local document list. Now the documents to be combined can be selected. They are appended to the document selected last. If the appended document has status **New**, it is deleted from the local list. In the other case, 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 of documents


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

Splitting of a document:

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

Display the document to be split in thumbnail view.

Select the page, which should be the last page in the original document – all following pages are sent into a new document.

Select **Split documents**  from the tools in tab **Edit** of the control box.

If the document to be split has status **Archived** the status is changed into **Checked out** and the part cut off is listed as a new document in the local document list.

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

Duplicating of a document

Select a document in the list and select from the context menu (right mouse button) the command Duplicate. If a document is duplicated it appears on the local list with the same index as the original document with status **New**. The index

data can be changed on the local list before checking in of the duplicated document.

Please note that data can be redundant, changes in the original document are not carried out on the duplicated document.

Convert a document

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

Hint:

As the conversion is done by the OCR text recognition it might be necessary to rework the text depending on the quality of the source.

Link to a document

If the same document should be retrieved with different index data, it would not be useful to create a copy or by duplicating, because when the document has to be changed the copies would remain unchanged. Data would be stored with high redundancy and overview and handling would be complicated.

Therefore it is possible to create links to documents. The link uses the same original document but the index may be different. If a change is made in a link, which also affects the original document the link and the original document are checked out automatically. Such a change would be an annotation or an appended page.

If only index data of a link are changed, the original document remains archived.

Hint:


In context menu in Info the ID of a document is displayed. The ID is a long unique string of characters. If a link is created, the link document receives the ID from the original document as ID (Ref). In the original document the ID (Ref) is the same as the ID. The ID (Ref) denotes the linked document.

If an original document displays an ID (Ref), there are links to this document. If a link has an ID (Ref), this is the original document to this link.

Important hint:

This option is not available in version 1.2.3 or later.

Creation of an empty document

Select **New document**  from the Scan tools in the control box in order to create an empty document without pages. The document is created in the local

document list of the selected document type. This function allows empty documents to be created as “containers” for later scanning.

Deleting of 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 from the document list currently used.

Delete single pages of a document

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

Recovering of a deleted page

If a page was deleted from an archived document and not checked in again, the version before deleting can be restored by clicking **Undo Check out**. If the document as already 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 list contains new or downloaded documents. These can be deleted any time without affecting the server documents.

Documents with status **Checked out** must be checked in again, before they can be removed from the local document list. If they are still listed as **Archived** on the local list after Check In depends on the automatic options during check in ([→ see Options](#)). If a document with status checked out cannot be checked in, check the status of the document on the server. If it is already checked in (by Undo Check Out), it can be deleted from the local list.


Personal list/folder

Document from the personal list can be deleted without deleting the relevant server document. If a document is stored on a personal list by a process of the process management module, it can only be deleted, after he process has terminated.

Delete documents from server


Search list

If a document with status **Archived** is deleted from the **Search** list, the server document is deleted, i.e. document is marked as deleted in the database. Documents with status Read only will disappear from the list, but they will appear again after a new search operation was performed which matches these documents.

Select the documents to be deleted and select **Delete**  from the toolbar **Edit**, or use the context menu of right mouse button.

Reactivate deleted documents

If a document is deleted in the WinClient, a flag will be set in the database, but it is not really deleted. With the Info Search a deleted document can be shown and displayed again.

If the document shall be undeleted, it must be selected and with the context menu of right mouse click it can be reactivated with  Undelete document. (???)

Automatic Indexing (Forms recognition)

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

The following requirements are necessary for a zone recognition:


OCR License

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 setup on the work station where WinClient is installed, the user can again perform an OCR recognition by clicking **OCR Document**  in menu **Edit**. This function is useful if for example documents should be indexed later or if **“Use OCR/Forms recognition”** was switched off in the relevant scan profile.

Indexing from external applications (Codeless Connector)

From external windows applications field contents can be taken over as index data with help of Codeless Connector. With a configurable keyboard shortcut the field content of

the external application is automatically transferred to the index fields linked in FileDirector. The connection of the fields and the shortcuts are configured in Enterprise Manager. See also section about Codeless Connector in Administration Guide (manual for FileDirector Enterprise Manager).

Hint:

The Codeless Connector can also be used with JAVA applications in Version 1.3 or later. For each work station using the Codeless Connector a licence is required.

Security on document level

If a user has full control on a document, he can access and specify security settings on a document. If for example a different user should edit a document which is normally not accessible for him, a user with full control can grant explicitly rights on that document for him.

Vice versa:

If a user should explicitly not view a document, but generally has the right to view it, this right can explicitly be denied.

Open the document and select **Extras** → **Security** from the menu.

A window for the specification of rights appears. Click to “Add” and add the user or group for which you want to give certain access rights.

The following rights can be given:

Full control

Allows the user to grant rights.

Create

Is “Create” denied for a user he may create documents on the local list, but he is not allowed to check them in. This is only important for new documents.

Appending or changes to existing documents is not denied if this option is denied.

Delete

If „Delete“ is denied, the user may not delete archived documents from the server. Local documents with status new may be deleted. Documents from the personal list may also be deleted if they are not currently sent by an active process.

Modify

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

View

Is the display denied generally the user cannot select the document during opening.

Download

If „Download“ is denied, a user can search for index data, but the according pages are not displayed with the document because the user is not allowed to download pages to the local cache.

Hint:

Using this option the management of the local cache and the log in to the computer is important. If standard authentication is used here, it may lead to lack of security if there work users with different rights on one work station.

[→ See Automatically log-in using current Windows account](#)

Downlod revisions

If right „Download revisions“ is denied the user may only download the latest version of the document but is no allowed to call earlier revisions.

Change annotations

If annotations are set on a page, they cannot be changed if the user does not have this right. With annotations certain parts of a page can for example be hidden.

Annotations

Annotations – General

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

If annotations should be added to a page the document is treated as if it is edited. After adding annotations to a page a document can be checked in again to the cabinet creating a new revision.

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

If a page has an annotation a symbol appears at the left corner in thumbnail view:



Display/hide annotations


Click to the button  **Display/Hide annotation** switches display of annotations on and off.


Annotations can only be hidden or displayed by a user who is allowed to change annotations.

Select annotation type


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

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

Select from the list of **Annotations**  the relevant annotation type. The default icon for this is the area zoom icon like displayed above; this will change according to the annotation type selected.

Display the page in the image display window and select  from the context menu of right mouse button. From the list of available annotations the type can be selected.


Black area

Select **Black area**  and drag a rectangular area on this page. It is filled with black.

If this tool is selected, keep left mouse button pressed at the position where an edge of the rectangle should be located. Drag the mouse to the position of the edge on the other side of the rectangle and release the mouse button.

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


White area

Select **White area**  and drag a rectangular area on the page. It will be filled with white.

If this tool is selected, keep left mouse button pressed at the position where an edge of the rectangle should be located. Drag the mouse to the position of the edge on the other side of the rectangle and release the mouse button.

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

Text

Select **Text** , in order to add a text annotation to a page. A text annotation has no background colour.

If this tool is selected, keep left mouse button pressed at the position where an edge of the rectangle should be located. Drag the mouse to the position of the edge on the other side of the rectangle and release the mouse button.

The properties of this annotation type are displayed in a window. Enter the text and select font and colour. After clicking to **OK** the text annotation is displayed on the page.

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

Line

Select **Line** , to draw a line on a page.

If this tool is selected, keep left mouse button pressed at the position where the line should start. Drag the mouse to the position where the line should end and release the mouse button.

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


Arrow

Select **Arrow** , in order to draw an arrow on the page.

If this tool is selected, keep left mouse button pressed at the position where the arrow should start. Drag the mouse to the position where the arrow should end and release the mouse button. During dragging of the mouse the arrow is already displayed and the head of the arrow follows the mouse cursor.

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

Highlight

Select **Highlight** , in order to emphasize a part of the image without hiding the content. This annotation works like a text marker used on paper.

If this tool is selected, keep left mouse button pressed at the position where an edge of the rectangle should be located. Drag the mouse to the position of the edge on the other side of the rectangle and release the mouse button. The rectangle is already displayed during dragging with the mouse.


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

Note

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

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

Hyperlink

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

If this annotation type is selected drag a window in the area where you want to place the hyperlink.

After you have released the mouse button window is displayed where the properties of the hyperlink are specified.

You have to specify a description of the hyperlink, which is used for display on the page. Select font and colour of the describing text.


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

Signature

To set a signature an image must be defined in Extras → Options → Signature →

Choose your signature image. You can define up to three different signatures for one person. To set the signature there must be entered a password and for all three signatures the same password must be configured. The picture of the signature will be embedded in the tiff file of the document page and can not be deleted later.

Stamp *

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

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

Hint:

- a) Stamps are only available when they are configured in Enterprise Manager by an administrator user.
- b) Stamps (for example with colour areas) are always translucent.
- c) Since version 1.4 stamps can be predefined in the scanprofile to put them automatically on the first page or on all pages of the document.
- d) "Embedding" stamps on a page e.g. the page is to be downloaded or sent via email, it is saved in *.jpg format.

Annotation as hyperlink to another document

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

Several documents can be selected and pulled simultaneously as links to the document. In this case the links are created one under the other on the page. If you click onto a link to view it, an additional tab will be shown to display the linked document.


Hint:

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

Move annotations

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

Delete annotation

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

Print Documents

Printing - General

These printing options of FileDirector WinClient allow the printing of single or selected documents and the printing of single and selected pages of a document. You can print TIFF and JPEG formats with WinClient alone. If additionally **Component Service** of FileDirector is installed, more than 200 different formats including Microsoft Office formats and Adobe PDF files can be printed.

Printing of a single document


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

Select **Print**  from menu **File** or from context menu of right mouse button.

Print several documents


Print several selected documents from...to

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


Select **Print**  in menu **File** or from the context menu of right mouse button.

Print selected documents

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

Select **Print**  in menu **File** or from the context menu of right mouse button.

Print one page of a document


Open the relevant document and display the page to be printed. Select the image display window and select **Print**  in menu **File** or from the context menu of right mouse button.

Print several pages of a document

You can select several pages of a document in thumbnail display for printing.

Open the relevant document; display the pages either in **Thumbnail view and image** or **Thumbnail View** only.

Hold **Ctrl** key pressed and click to the pages to be pressed in thumbnail view.

Select **Print**  in menu **File** or from the context menu of right mouse button.

Copy/print area



With this option an area of the page view can be selected. After opening the window a menu appears. Now you could choose whether to send the selected area to the printer, to send it exact scaled to the printer or copied it to the clipboard. From the clipboard it can be copied in the body of an email for example.

Area with OCR text recognition into the clipboard

In Version 1.5.1 or later is in the copy/print area menu the additional option „clipboard (Text)“ available. With this option the area of the scanned file is read by OCR and the recognized text is saved into the clipboard. The text can be copied from the clipboard into other applications.

An OCR Server licence is required for this option. Thus it can be used by all WinClients which are connected to the server even without installing the OCR engine on each client.

Print document lists

If a list of the selected documents should be printed they have to be selected first. Create a list with command **Print document list** from the context menu of right mouse button.

Hint:

For a search on the FileDirector server a maximum number of documents is specified to be displayed on a document list. This maximum value is as default set to „1000“. If more than 1000 documents should be printed and listed in WinClient this value can be set on the server by an administrator.

Export and print list

In order to export a list the entries to be exported must be selected. With **File** → **Export** → **Export document list** a file can be generated. This file can be saved as *.xml file or as *.html file. When generating a *.HTML file a table is generated which can directly be displayed and printed from Internet explorer.

Hint:

The hitlist can also be copied to the windows clipboard and then pasted into Excel or a text file for further working.

Save document as file

Save whole document

Select the document to be saved in the search list and select „Save as..“ in context menu of right mouse button. The pages of the document are saved in the directory specified during this process.

Assign file name automatically

If the whole document is stored, the content of an index field can be chosen as the file name. In this case the mouse cursor must be positioned on the index field to be used for file naming. Open context menu with right mouse button in this situation and select the “Save as...” command. If the mouse cursor points left to a document in the document list, the original TIFF file name is selected for saving.

Save one page

If you call „Save as ...“ in display window, only the displayed page is saved with the original TIFF file name.

Save a selection of pages

Change to the thumbnail view in display window and select the pages to be stored. Open context menu with right mouse in this window area and store the pages in the relevant directory.

Save documents in different formats with/ without OCR text recognition

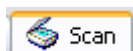
Documents can be saved via the option „save as...“ in different formats. If you want to convert a scanned page into an editable text, you have to install the OCR engine on the local client. For this an OCR client licence is required. During the storage process the OCR recognition will be done automatically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

The following formats can be used for saving:

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

Scanning documents

Scanning - General



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

Supported scanners

The support of a scanner depends on the available drivers. Different CANON drivers are integrated in the system. Other scanners can be used with TWAIN drivers delivered from the manufacturer with the scanner.

WinClient supports directly without additional drivers many Canon Document Scanners for example DR-2050C, DR-2080C, DR-2580C, DR-3020, DR-3060, DR-3080C, DR-3080CII, DR-4010C, DR-5010C, DR-5020, DR-5080C, DR-6080, DR-7080C, DR-7580, DR-9080C, MS 300, MS 350, CR-180 (cheque scanner)

In order to use the scanners scan profiles are configured with Enterprise Manager which are used by the WinClient. WinClient can temporarily adjust the scan profiles. WinClient cannot create new scan profiles.

Directory scan

A scan profile can be configured as **Directory scanner**. In this case files are imported from a defined path, either a local path or a UNC path. This scan profile can be configured to delete the files after importing.

Rights for scanning

If a user should be able to scan documents he should have the scanning rights so that the tab Scan is available for him. If the user has no right to scan the tab will be invisible.

Scan profiles

Documents are scanned with scan profiles. The scan profiles are configured in Enterprise Manager from a FileDirector administrator. Scan profiles should be designed to create maximum quality by setting the best scanner parameters for the documents to be scanned. In a scan profile a fixed document type can be designed or a field can be filled automatically.

Which scanner settings can be set in the scan profile depends on the scanner and the driver used. In a scan profile the resolution is specified, if only the front or if the front and back of a page should be scanned, if black and white or colour should be used, the compression settings (for *.JPG files) and the page size.

A scan profile can also be set to automatically collect a defined number of pages into one document.

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

Hint:

If you cannot see the tab Scan, you might not have the right to scan.

Change scanner settings



If you select a scan profile with a predefined scanner, the scanner settings can temporarily be changed in WinClient. For example the brightness setting can temporarily be adjusted to the quality of the documents to be scanned. The possible settings depend on the scanner driver used.

If the configuration of the scanner driver is reseted with the “default” button to the default settings, the configuration of the Scanprofile will be assumed FileDirector version 1.3.1 or later.

Set automatic value

It can be specified, that an index field is always filled with a fixed value if this scan profile is used. One index value to be set automatically per scan profile can be specified by an administrator in Enterprise Manager.

Use OCR-/Forms recognition

This option can be switched on if forms are configured, if this was allowed in the scan profile. If documents should be scanned using OCR recognition, Component service and OCR engine must be installed on the Client PC.

Hint:

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. Therefore the resolution in a scan profile using forms recognition should predefined and not be changed by the user.

Selection of document types

If a document type can be selected during scanning or if it is fixed is predefined in the scan profile setup from an administrator.

Scanning of documents

Scan multipage documents

All pages in the feeder of a scanner are scanned and stored in one document in FileDirector. The only exception can be set in the scan profile, if after a defined number of pages a new document should be created automatically.

To scan a multipage document:


Select tab **Scan** in the control box of the cabinet.

Select the relevant **scan profile**.

Select a document type where the document can be stored. When the scan profile is specified to not allow changes of settings, the document type is selected automatically.

Index information can be entered into the index fields before scanning.

Documents can also be indexed afterwards.

Select  in toolbar **Scan**, if you want to empty the content of the index fields currently displayed. Additionally a scan profile can be designed to perform an automatic OCR/forms recognition on the whole document. In this case indexing is performed automatically – if forms recognition and the client are configured for this task.

Select  from toolbar **Scan** in the control box in order to start batch scanning.

[See also → Show post scan options](#)

Scan single pages

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

In order to scan a single page:


Select tab **Scan** in the control box of the cabinet.

Select the relevant **Scan profile**.


Select a document type where the document can be stored. When the scan profile is specified to not allow changes of settings, the document type is selected automatically.

Index information can be entered into the index fields before scanning.

Documents can also be indexed afterwards.

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

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

Select  from the toolbar **Scan** in the control box in order to start scanning.

Append pages

Pages can be appended to any document in FileDirector apart from documents which have status **Read only**. These documents are currently checked out for editing by another user and can only be edited by somebody else after they have been checked in.

If the document to which pages should be appended displays status **Archived** it will have status **Checked out** after scanning. The document is then displayed on the local document list.

The scanned pages are appended to the end of the document.

To append pages to a document select tab **Scan** in the control box of the cabinet. Select the relevant **Scan profile**.

Select the document to which pages should be appended. With Append pages



from toolbar **Scan** the pages can be appended by scanning.


Insert pages

To insert pages into a document select tab **Scan** in the control box of the cabinet. Select the relevant **Scan profile**, select the document into which you want to insert and open it.


Select the page for inserting. The new pages will be inserted before the page selected.

With Insert pages  from toolbar **Scan** the pages can be inserted by scanning.


Replace one page

To replace single pages in a document, choose the tab Scan in the Control Box of the cabinet. Select the desired (??? wanted/ designated) scan profile and choose the document and open it. Select the page you want to replace and click  to replace one page.

Replace all pages

With the command „Replace all pages“  from the toolbar Scan the pages can be replaced during the scan process. The pages which were scanned before can be viewed in the revision.

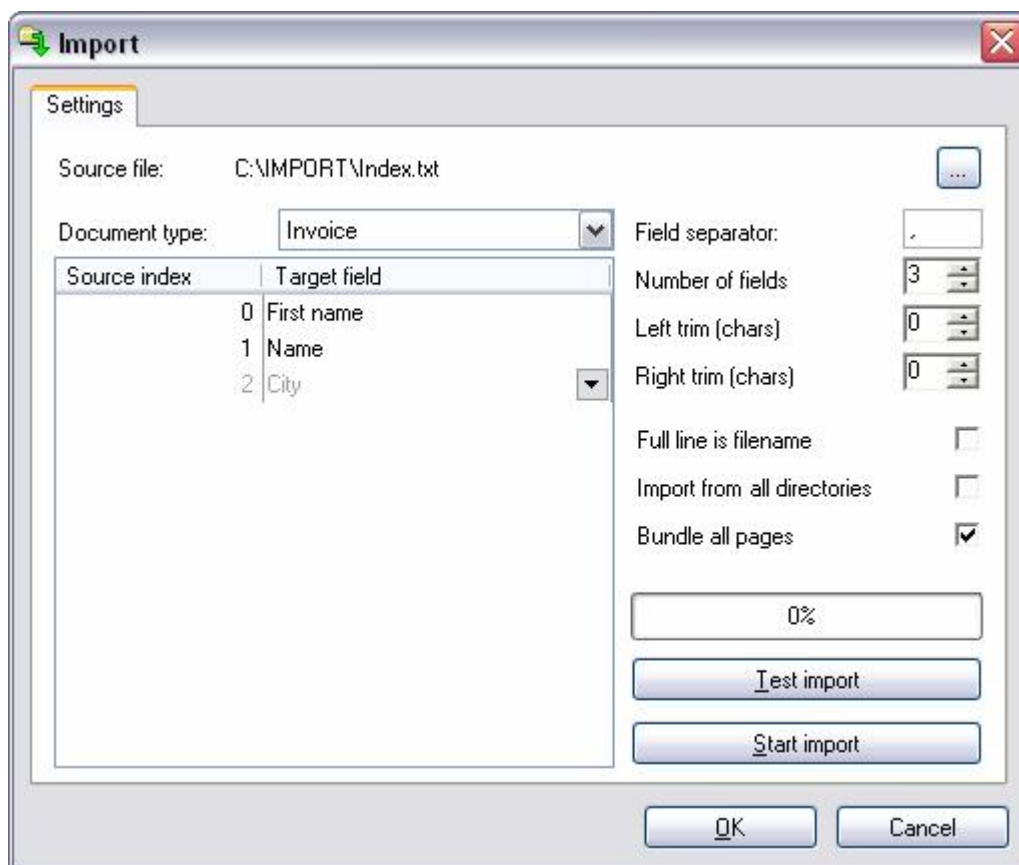
Stop scanning

The scanning can be any time stopped by clicking to  in the control box of the cabinet.

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

Import documents

Import list / Import - Index



With **File** → **Import** index fields can be imported from a text file. In this text file the fields must be separated by a field separator. This field separator must be specified in the import template.

Index data can be imported as follows:

Define import file (*.txt, *.dat, *.csv etc.) with field separator or export a file from another application.

If one or more file names of image files are specified at the end of each line of this text field and these files are stored in the import directory, they are imported to the

according index information as pages.

The content of a text file to be imported could be the following:

```
Helmut,Meier,01234,imagename1.tif  
Rita,Schmitz,56789,imagename2.tif
```

Execute **File** → **Import**

Select source file. This is the text file described above.

Specify field separator which is used in his file (here: comma)

Set number of text fields from the text file

Select document type to which the data should be imported.

Set field connections. The source index is the column of the text field and the target field is one the index fields used in the document type selected before.

Left / right trim:

This function allows to cut off control characters which may be exported to the text file if it was generated from another application. An import file may look as follows:

```
^Helmut^,^Meier^,^01234^,^imagename1.tif^  
^Rita^,^Schmitz^,^56789^,^imagename2.tif^
```

The special character ^ around each field can be cut off during import.

Ignore line starting with a special character

With this option the character at the beginning of a line in the index file can be ignored when importing. In some cases it can be helpful to have comments in an index file or when some lines should be ignored. If you use files which were exported from another program it also can be necessary to ignore several lines.

Full line is filename

If the filename of a document already contains the index data this option can be used:

Example:

The name of the files is as follows: **12345_Meier_Duisburg_01.jpg**
 22233_Schmitz_Köln_02.jpg

The index file is stored in the same directory and contains the listed file names:

Index.dat:

```
12345_Meier_Duisburg_01.jpg  
22233_Schmitz_Köln_02.jpg
```

The index settings are configured using a „_“ as field separator. Specify the number of index fields and assign the position within the file name to the index fields of the relevant document type.

Import from all directories

If there are several directories on the same level containing index data, which contain an index file which is named as the first selected index file name (in this case: index.dat), the import is processed for all the directories when this option is set. With this option it is not necessary, to select the next index file in a different directory manually for import.

Bundle all pages

If this options set, the import works like a batch scan. All documents with the same index data are written into one document. If this option is not set, all image files are imported as single page documents.

Test Import

If the settings lead to a good result and if there are any configuration errors can be checked by the test import function. A file *.testresult will be created in the import directory containing the test results. This file can be checked with an editor.

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

Hint:

With manual index import in WinClient new documents can be imported. The imported data are created on the local document list and have to be checked in. If documents from an index import should be edited and amended this must be performed with a server based index import. This index import scheduler can only be configured by an administrator in Enterprise Manager. (→ see Administration Guide)

In Version 1.2.3 and later File and Index-Import can also be processed automatically with a server based scheduler.

Import successful / not successful

When import has finished, a message appears stating if the import process was successful or not. If the import procedure was not successful, but has been executed anyway, the index file may have pointed to not existing images. In this case please check, if the images are all located in the same path as the index file.

Special scan options

Skip first page with barcode (separation sheet)

/skipbarcodepage

This application is often used for the digitalization of data when barcode pages are used as batch separator during the scanning process.

To delete the first page which contains one or several barcodes after a batch scan , the WinClient must be started over a link with the start parameter „/skipbarcodepage “

Procedure:

Create a link to the program start of the WinClient and write the option behind the path:

C:\Program Files\Dieter Spielberg DMS GmbH\FileDirector WinClient\ FileDirector WinClient.exe /skipbarcodepage

Hint:

To set the parameter it's not possible to use the automatic created start link icon of the WinClient on the desktop. For running the WinClient with the parameter create a new link to the WinClient.

Component Service (Office Link)

What is an electronic document (Edoc)?

Each file format created outside of FileDirector and not being a standard image format like TIF or JPEG is treated as a propriety file format. Example for these file formats are Microsoft Word, Excel and PowerPoint, Emails in Windows MSG format, Adobe PDF files or AutoCAD files. In FileDirector we call these formats „electronic documents“ (Edocs).

How are Edocs stored in FileDirector?

Each Edoc is saved as a page of a FileDirector document, even if the file itself contains several pages. If you want to display such a „page“ of a document the **Component Service** must be installed because it contains a viewer for a lot of the electronic file formats.

How can Edocs be displayed?

The Component Service contains the Stellent Viewer, which allows the display of different file formats without the relevant application being installed on the PC.

The viewer supports more than 200 different file formats including the most important propriety formats. Example for these formats are Microsoft Word, Excel

and PowerPoint files, Microsoft MSG Email files, Adobe Acrobat PDF files and AutoCAD drawings.

Editing of these formats is only possible, if the application is installed which created the files.







The viewer is only meant to display and print the electronic documents. It cannot recognize and display each and every format detail or special setting 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.

Hint:

The support of the Component Service for Windows 98 and Office 97 (and earlier versions) is discontinued.




Selection of a page when displaying Edocs

The browsing through an electronic document depends on the file format. In a Microsoft Word file a vertical scroll bar is used to navigate through the pages of the document. In other file formats like Microsoft Excel, PowerPoint and Adobe Acrobat navigation tools are displayed in the bottom part of the display window. These tools allow browsing page by page or a direct selection of the page. For each page of the file a kind of tab is displayed with **Image** and the relevant page number. Left to the tabs the navigation tool are displayed:

-  **Display tab of the first page of the file**
-  **Display tab of the last page of the file**
-  **Display tab of the previous page of the file**
-  **Display tab of the next page of the file**
-  **Display previous page of the file**
-  **Display next page of the file**

Tools for page display

Select from toolbar **Display** or from context menu of right mouse button the following commands in order to fit the relevant page to the display window. Eventually a vertical scroll bar appears, which you can use to move the displayed part of the page in the display window.

-  **Fit width to the document display window**
-  **Display page in original size**
-  **Zoom in (enlarge display)**



Zoom out (decrease display)

Indexing of electronic documents

Requirements

If you want to use Office Link Component Service must be installed on the client. It must be present if you want to archive via Office and as well if you want to use Drag and Drop.

When Office link should be used, the Office Components Word, Excel, Outlook and PowerPoint must be installed.

Hint:

Office 97 and earlier versions are not supported.

Hint:

During the installation of the component service you can choose whether it will be installed for the user who installs or for all users. When it is installed only for the one user the button in office does not exist for other users.


Indexing from Microsoft Office

During installation of Office Link a button  for archiving is created in the Office applications.

When electronic documents should be indexed the cabinet should be opened in the background to which documents are stored.

If a document is archived an index template opens up, where the target document type and the index for this document can be specified.

If WinClient is not open, the index template appears directly when WinClient is opened for the next time.

Create a document for example in Word and click to the FileDirector button .for archiving. If WinClient is open, the index template appears.

Since version 1.4 the WinClient need not to be opened in the background, because a cabinet can be chosen in the FileDirector index capture window now.

The index capture

Choose the target cabinet and document type where the document is to be archived to and fill the index fields in the index capture window.

When clicking to OK the index information is stored for the current document.

If several documents were sent to FileDirector for archiving the same index can be stored for each document.

The document appears after archiving on the local document list. It must be checked in in order to be available for retrieval.

The screenshot shows a dialog box titled "FileDirector index capture". It has a "Settings" tab. The "File:" field contains the path "...\\OfficeLink\\20070411 16052813.files\\00000001.tif". Below this is a "Company" dropdown menu. The "Document type:" dropdown is set to "Invoices". There are several other dropdown menus: "InvoiceNo." (123), "Document" (Invoice), "Name", "Street", "OrderNo.", "Date", "Postcode", "City", and "State". At the bottom, there are navigation icons (back, forward, search) and buttons for "Apply to all", "OK", and "Cancel".

Revising of electronic documents

When an electronic document was checked in and must be revised, open this document in the WinClient and have it advised.

By using the context menu of the right mouse button in the document window you can start the application. The used application opens. After changing the document in this application you are asked when pressing the FileDirector button to save the document whether the document should be checked in again to apply the changes. To avoid that the document is changed by other users it is possible to check it out before it is edited in the application.

After the changes archive the document by using the FileDirector button and a revision of the document is saved. Please check in the document again after editing it.

Several fields as a unique index

In the lower part of the index template some navigation buttons can be found. These buttons become active, if several fields must be defined as a unique index. This is a configuration which must be predefined by an administrator user.

A client number can for example be a unique index. The index may no be used twice.

If for example two index fields must be filled out to create a unique index, the selection can be done with the navigation buttons.

Example:

The number ranges for client numbers are identical for different areas. It is possible that a client number 4711 exists as well in area A and in area B.

In his case only the first two fields together form a unique index (for example 4711 and A). Now specify the first index and click to OK. Now the system finds that this is not yet a unique index and it allows to select the area in the second field with the navigation buttons in the bottom toolbar.

Office Quick Start



If Microsoft Office is installed, the applications can be started via the buttons of the quick start bar directly from WinClient.

In Extras → Options additional applications can be integrated to the quick start bar of WinClient in tab „Misc“ by dragging and dropping of the application to the configuration template in “Misc”.

Indexing using Drag & Drop

In order to archive electronic documents any file can be selected in windows explorer, dragged and dropped to the menu area of the WinClient desktop or the area of the list names below the display part.

A question is prompted: „Save all files to one document?“ If this question is answered with Yes, the index template appears only once for the complete document. All files will then be stored as one document under the index specified. If the question was answered with No the index template appears for every single file.

Save filename as index

An administrator user can setup an index field, that the file name is used for automatic indexing. The index field must be defined to be able to take the file name as index.

Send to FileDirector

This function is also available in Windows explorer via the context menu of right mouse button. Select the files to be archived and select command **Send to** →

FileDirector. The functionality of the index template is the same as described in Drag & Drop.

WinClient must be open; otherwise the index template will not appear.

Before version 1.4 the index capture window only appears if the WinClient is open. In version 1.4 or later this is not necessary anymore.

Hint:

If the command „send to...” is used with right mouseclick and several pages are selected in the Microsoft Windows Explorer, the page on which the rightclick is done will be the first page.

Capture Emails from Outlook

To capture emails from Outlook the emails are archived with a button from FileDirector which is available after the installation of the component service.

In the normal case the emails are saved as complete *.msg file. Since version 1.4 the attachments can be saved as separate page in the original format and are appended to the document.

The Component Service can be configured to save the attachments separate as a basic principle or the user can be asked how to save the document with attachment.

To setup this option, open in the program path of the Component Service the file FileDirector Component Service.exe.config with an editor. After a standard installation the path of the file is:

“C:\Program files\Dieter Spielberg DMS GmbH\FileDirector Component Service”.

In this file the following options exist:

Save email attachments as separate pages

To save email attachments as separate pages, the following option can be set in the above mentioned file:

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

This value can set to “value = “Ask”, „On“ or „Off“.

Off = Emails are saved as complete *.msg File and attachments can be opened when the email is opened with office again (Rightclick, run Application). This requires that on each pc where the attachment is to be opened the office must be installed.

On = The attachments of emails are saved as separate pages of the document and the body is saved as html page.

Hint:

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

Ask = With this option the user is asked during the archiving in outlook wether the attachments are to be saved as separate pages or not.

Save attachments as separate Documents

When the attachments have to save as separate document and not only as separate page, the following option is to be set to "TRUE":

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

The default value after an installation is "FALSE", that means not activated.

Sending and receiving

Send documents by Email

Sending by Email - General

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

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

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 format is directly appended to the Email in its original format.

Append as *.pdf - format

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

Configuration of filename for Email appendage

Default procedure without settings

The file name of a TIFF file contains a time stamp, where the date and the time of scanning is stored.

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

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

Configuration of file name

The file name can be set manually, if an option in the WinClient settings is configured. Open options menu in extras: Options → Misc.. The file name to be used can be

configured to be made up of three parts and a field separator. The file name is assembled from these parts when Send to is used.



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

Hint:

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



Sending of a single document

Select the document to be sent in the document list.

Select **Send to**  and then **Email**  via context menu of right mouse button.



Your Email Client will open a new message and append the document to this new message. You have to specify a target and possibly a message to this new Email.

File name of the appended document

If the whole document is sent, the content of an index field can be chosen as the file name. In this case the mouse cursor must be positioned on the index field to be used for file naming. Open context menu with right mouse button in this situation and select the Send to  → Email  command.

Sending of several documents



Click to the first document of the document list and keep the SHIFT key pressed.

Click to the last document of the document list you want to send and select **Send to**  and then **Email**  via context menu of right mouse button.

Your Email Client will open a new message and append the selected documents to this new message. You have to specify a target and possibly a message to this new Email.

Sending selected documents


Click to the first document of the document list and keep the CTRL key pressed.

Select the documents to be sent. Select **Send to**  and then **Email**  via context menu of right mouse button.

Your Email Client will open a new message and append the selected documents to this new message. You have to specify a target and possibly a message to this new Email.

Sending of one page of a document

Open the document and display the page to be sent.

Select **Email**  by clicking with the right mouse button on the thumbnail of the currently displayed page

Your Email Client will open a new message and append the selected page to this new message. You have to specify a target and possibly a message to this new Email.

Sending of selected pages of a document

You can select pages of a document in the thumbnail view of the display window for sending. In order to view. Open the relevant document; display the pages either in **Thumbnail view and image** or **Thumbnail View** only.

Keep the CTRL key pressed and click to the pages to be sent in the thumbnail view.

Select **Email**  by clicking with the right mouse button on the thumbnails.

Your Email Client will open a new message and append the selected page to this new message. You have to specify a target and possibly a message to this new Email.

Send eMail as link

When a document is sent via the function  eMail as Link, a link will be created automatically in the clipboard for the WinClient and for the WebServer to call the document.

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



The links are composed (assembled) of the fragments which are preconfigured in Extras → Options → Misc.

Send Documents to users

The personal folder



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

Sending of documents

Select the document to be sent in the document list. In context menu of right mouse button use **Send to**  and select the target user . When sending a comment can be added as a note for the recipient who is displayed when the document is opened.



Selection of a range of documents

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

Select **Send to**  and **User**  via the context menu of the right mouse button.

Selection of single documents

In order to send several selected documents from a list, click to the first document to be selected, hold **Ctrl** key pressed and select more documents.

Select **Send to**  and **User**  via the context menu of the right mouse button.

Notification

Under **Extras** → **Options** → **Notification** a notification mode can be set.

Hint:

If a notification is specified with a short time interval, WinClient always reestablishes a connection to the server. In this case the license may not be freed for another user.

[See → also General settings/Options](#)

Send to ... Info

If a document is sent to a user the info of the document shows to which users the documents was already sent. Select the document and execute in context menu of right mouse button **Document Info**. The information is listed under tab **Send to....**

[See → also Info of documents](#)

Process management *

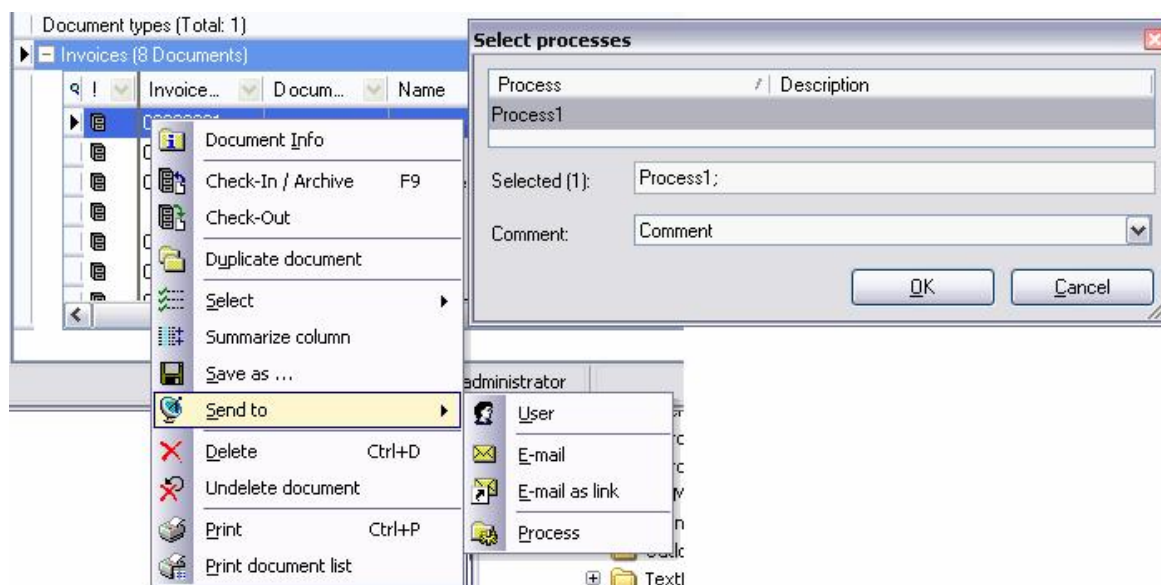
What is process management

A process in FileDirector is a predefined number of Steps. During these steps documents are sent to FileDirector users. The users have to perform specific actions in order to finish a process step. Any number and configuration of processes can be set up by FileDirector administrators. Documents are introduced to processes by a sending function.

Send to process

Processes must be defined if a document should be sent to a process. Documents can be sent to processes either manually or automatically.

Manual sending of documents to processes



To send documents manually to processes proceed as follows:
Select the document to be sent
Select from context menu of right mouse button **Send to...** → **Process**.

Select the process to be used. Which process should be used must be checked with the administrator who configures the processes and adjusts them the companies needs.

In field **Comment** a comment can be entered for each document to be seen by the next recipient.

With **OK** the document is sent.

Automatic sending of documents to processes

In FileDirector Version 1.2 and later conditions for processes can be specified depending on index values.

This simplifies the selection of processes for a user, because a document selects a process automatically according to a defined index field content. The user does no have to select a process manually.

An automatic process can either be started when checking in new documents or when changing documents already archived.

Receiving of documents from a process

Each document received by a user from a process is stored in his personal folder. The action which the user must execute is displayed in column **Action** of the personal hitlist.

If you open a document sent by a process a button is displayed in the display window to execute the relevant action. Additionally the comments are displayed which may already have been added by other users.

After you have executed the action required the document is closed and send back to process management control. If necessary you can keep a link to the document in your personal folder by selecting check box **Keep local copy** before executing the required action.

Process actions

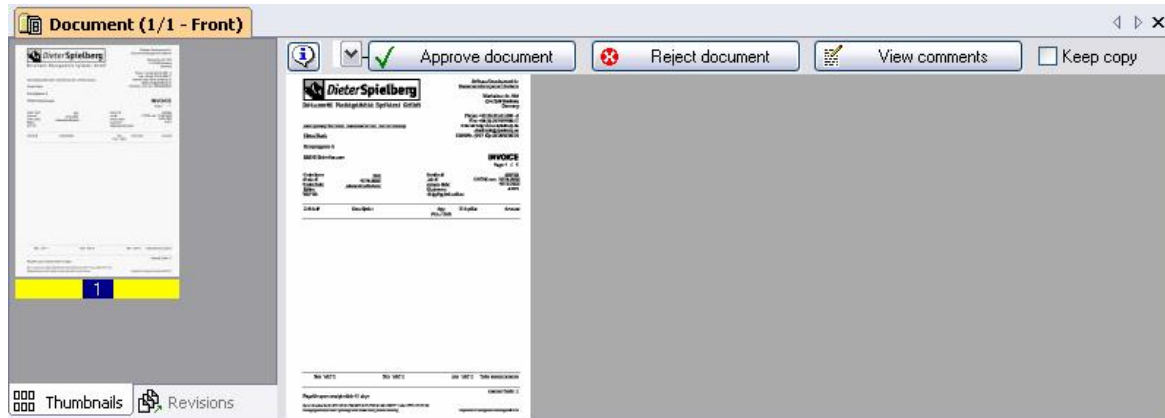
For each document received by process management you have to execute the required action for the relevant step. The document will stay in your personal folder if either the required action is executed or the time delay specified is reached. Afterwards process management again takes control of the document.

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 action **View** is specified for a document, you must confirm that you have take notice of it by clicking to a button. Afterwards process management can take the document to the net step of the process.

The action is performed a follows:

Open the document in your personal folder

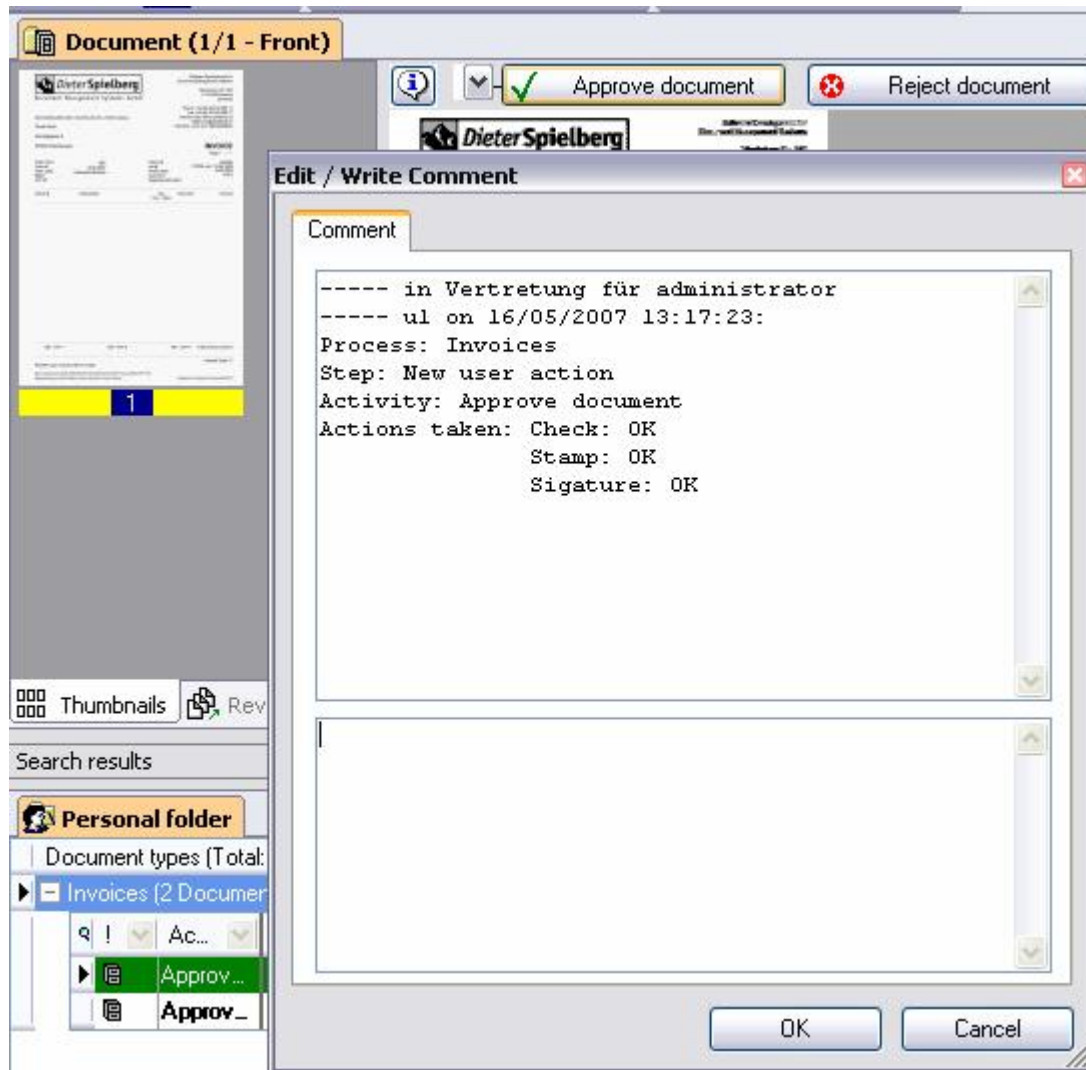
View the document

Select **Keep document**, if you want to keep a local copy in your personal folder.

Click to button **Confirm View** in order to execute that process Step.

If **Keep document** is not set, the document will close and will disappear from the personal folder. If **Keep document** was set, the document remains and a copy is maintained in the personal folder.

Comment document



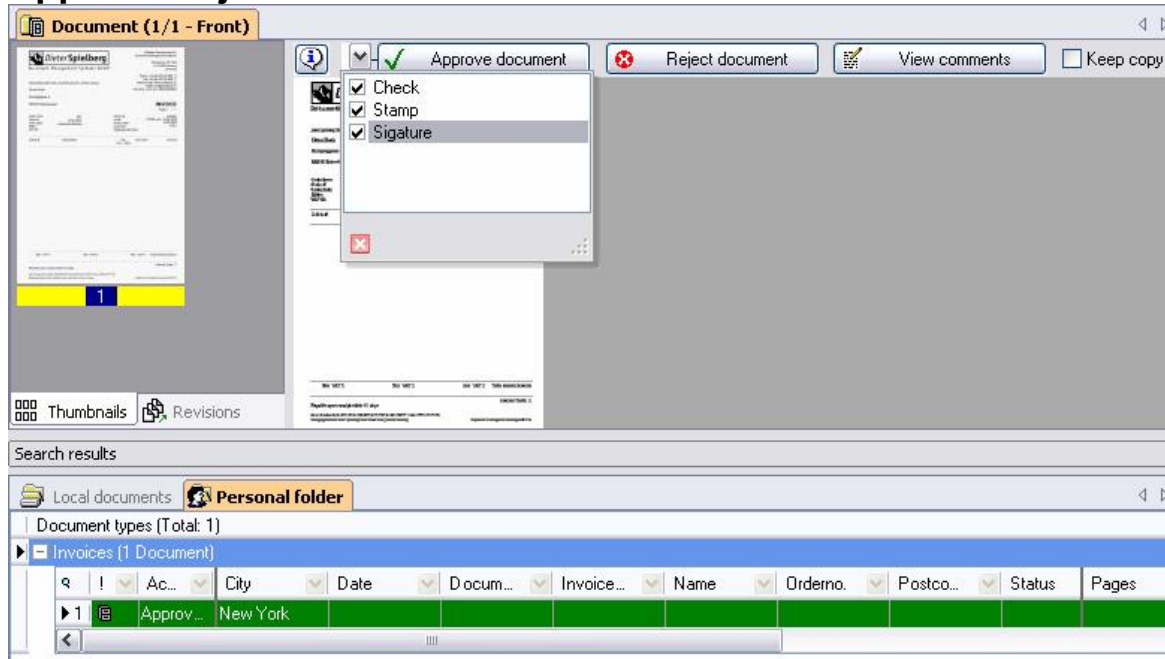
If a document step has action **Comment** assigned, you must read and add a comment. Afterwards process management can carry the document over to the next process step.

The action is executed as follows:

- Open the document in your personal folder
- Read the document
- Select **Keep document**, if you want to keep a local copy in your personal folder.
- Click to button **Comment** in order to open the comment field.
- Enter the comment
- Click to **OK**

If **Keep document** is not set, the document will close and will disappear from the personal folder. If **Keep document** was set, the document remains and a copy is maintained in the personal folder.

Approve/Reject document



If action Approve/Reject was assigned to a process step, the document must be read and then the user must decide whether the document is approved or rejected. In both cases a comment can be added.

The action is executed as follows:

- Open the document in your personal folder
- Read the document
- Select **Keep document**, if you want to keep a local copy in your personal folder.
- Click to button **Approve** or **Reject** in order to open the comment text field.
- Enter comment if necessary
- Click to **OK**

If **Keep document** is not set, the document will close and will disappear from the personal folder. If **Keep document** was set, the document remains and a copy is maintained in the personal folder.

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 confirmed. This list can be set up user specific. As long as not all checks are completed the document can only be rejected.

Which options on the list were checked can be seen in the comment of the document later on.

Keep document


If a document is kept and stored in the personal folder after the process action was executed, it can be deleted any time from the personal list. This does not delete the stored server document. The stored document gets status **Archived** and must be checked out if it should be edited again.

Hint:

The legend of the buttons can be changed as well during the configuration of a process. Therefore there might be another text as e.g. "approve document", "reject document" or "approve view".

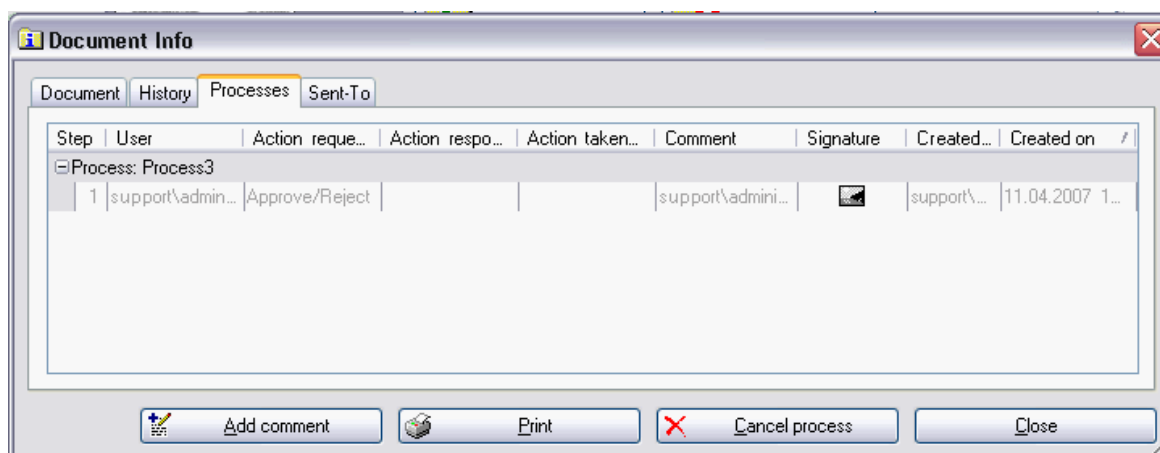
Process Status

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 he must execute, 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. The document which is during (in) a process can be retrieved and commented from the process status.

Select **Process State**  from menu Extras in order to display the process status list.

Process Info

Select the document and open from context menu of right mouse button the document Info. In tab **Processes** the steps can be seen which have already been performed.



Add comment

If a document is on a process, with the document info, you can write a comment to the document at any time.

Print process list

The list of the processes executed can be printed by clicking to **Print**.

Cancel Process

If a running process should be cancelled, this can be done in WinClient by clicking to the relevant button in document info.

Signing of Documents with signpad

Process management can be designed that documents must be signed to approve them. A licence and a special hardware are necessary for this. A sign pad is used for signing for which a driver must be installed first.

Install sign pad



Sign pad from signotec

In order to install the sign pad connect it with a free USB Port of your work station. On the FileDirector installation CD a directory „Sign pad driver” is stored containing the driver. Start file SETUP.EXE and follow the installation menu.

Hint:

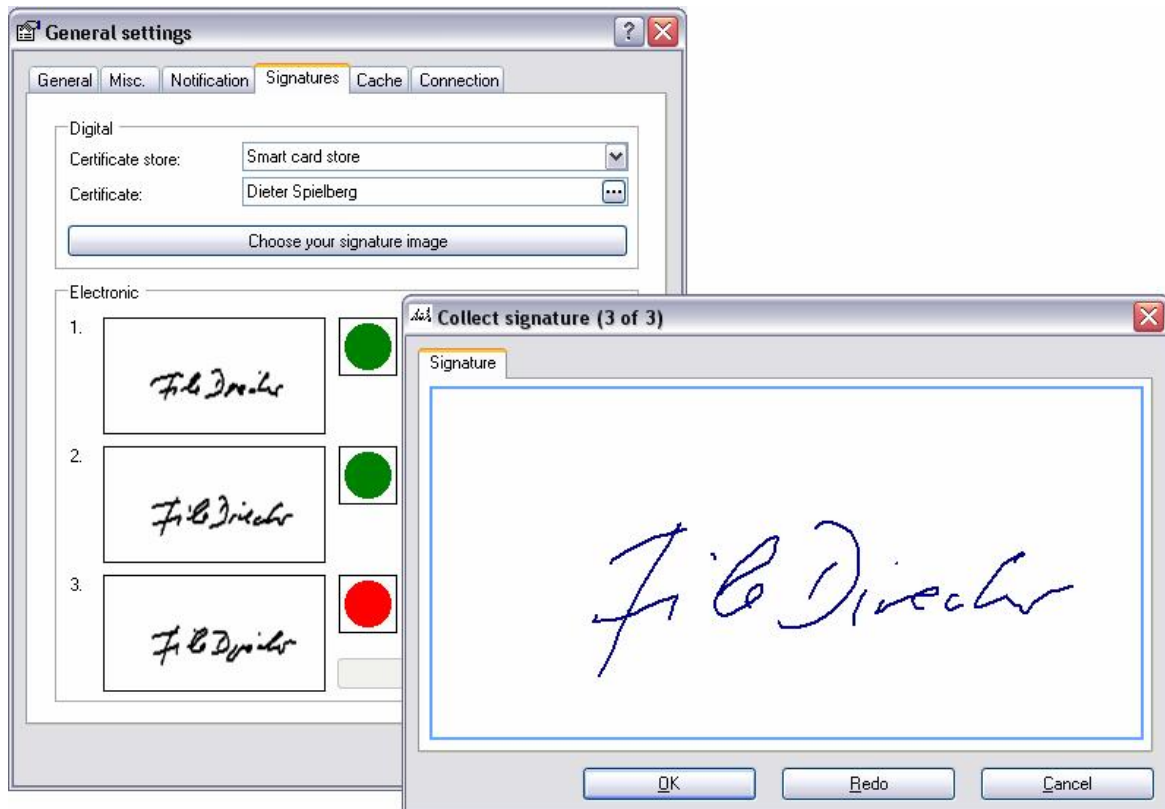
*a) NT4 does not support USB; therefore the Pad can not be installed
For Windows 98 a windows driver for usage of USB ports must be installed.*

b) Up to now the software only supports the signotec sign pad.

Setup signatures

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

If the driver was installed properly, the pad should react like a mouse cursor. Open WinClient for the configuration of signatures and click to **Extras** → **Options** tab **Signatures**.



Click to the button right to the first signature box and create a sample signature. After clicking to OK the second sample box opens and you can create a second sample. Fill out all sample signatures. The signature can be tested by clicking to Check signatures. If you enter your signature again, it will be compared with the three samples. If green buttons appear at the sample boxes, the signature was recognized correct.

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

Hint:

The sensitivity for the signature recognition can be set in the web.config file of the FileDirector server. Please ask your administrator for modification.

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

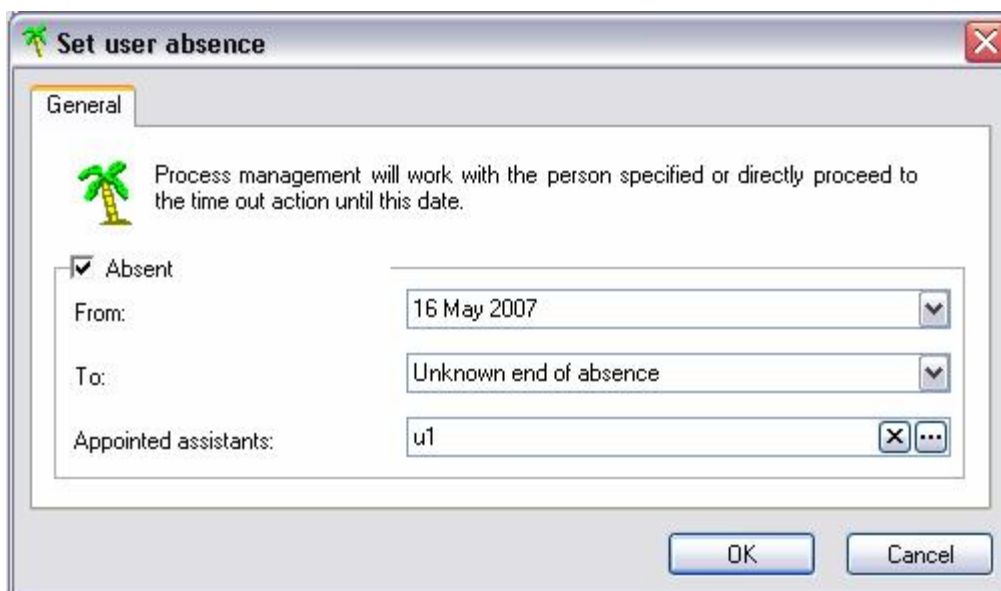
Please refer for further details of the settings of the configuration file to the installation manual.

Deleting of signatures

In order to repeat a signature configuration it may again be specified in the configuration template. To delete a signature completely for a user an administrator user is necessary to do it in Enterprise manager.

Set up absence

When using the process management, the documents are sent to different users for editing. The user sees the document on his personal list. When a user is e.g. on holiday, he can specify a period for an appointed assistant. The appointed assistant had better sufficient rights to edit the document and to deputize the user adequately.



The absence can be set with Extras → absence settings.

If a user was not able to set up the properties himself, it can be done centrally by an administrator in the Enterprise Manager to provide that the documents can be edited by an agent.

Hint:

If this option is not available, you might add this command by using "customize"


Information of documents

Logging of document information

Each action that takes place with 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 give below, general information like when the document was created by which user, its size and the number of revisions. The document history contains a list of retrieval activities and modifications. Further information is stored about process activities and sending of documents.

Info: Document

Select the document to which you want to display information. With **Document Info**  in context menu of right mouse button the document information can be retrieved. The information is displayed in a **Document-Info-Window**.

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	User account which performed first storage
Checked out on	Date/Time of Check out
Checked out by	User account who executed Check out
Size	Storage space needed for the document


Info: History

Select **Document Info**  in context menu of right mouse button on the document list. Select tab **History** of document info window.

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: Retrieved or changed
Created on	Date/Time of action
Created by	User account involved


Info: Processes

Select **Document Info**  in context menu of right mouse button on the document list. Select tab **Processes** of document info window.

In **Processes** all actions are listed which are executed on this document by process management.

Information	Description
Process	Process name
Step	Number of step in process
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


Info: Send to

Select **Document Info**  in context menu of right mouse button on the document list. Select tab **Send To** of document info window.

Send to contain 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

Select **Info**  in context menu of right mouse button when clicking on the currently displayed page in the display window. Information about TIFF or JPEG pages is listed.


Information	Description
Cabinet	Name of cabinet where document is stored
Document type	Document type, to which document type is stored
Document ID	Unique number (ID) of the document
File type	File type (TIF 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 Percent

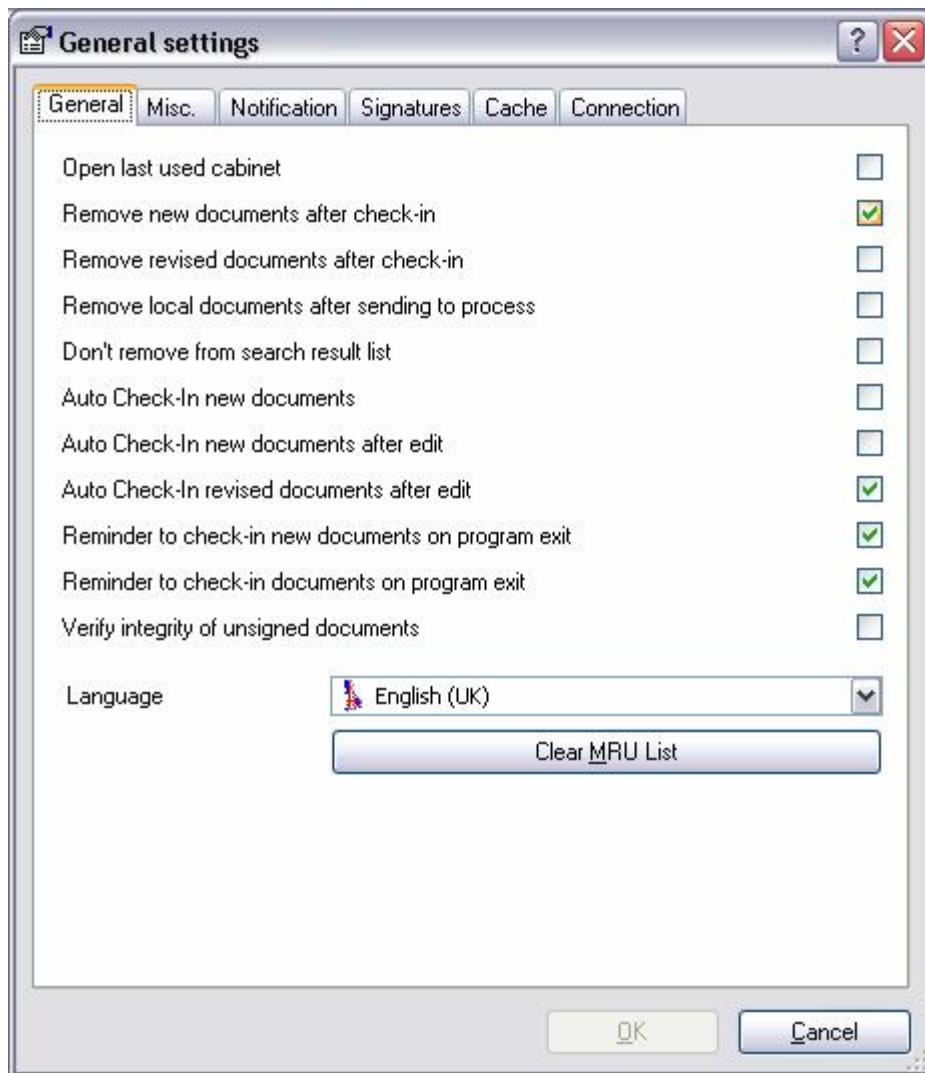
General settings/Options

General

With different settings WinClient can be configured to execute certain actions automatically, for example to display the cabinet list automatically.

These settings can be stored per user on the FileDirector server and be downloaded to WinClients opened by this user. In this way a user profile can be loaded on different work stations.

To change this settings select **Options**  from menu **Extras** and select tab **General**. If settings are changed they are stored with clicking **OK**.



[See also → Automatic Check in / Settings in Options](#)

Open last used cabinet

When set, automatically the cabinet last used is reopened when starting WinClient.

Click to **Open last used cabinet** to activate and deactivate this setting.

Remove new documents after check-in

When activated new documents are automatically removed from the local list when they have been checked in to the FileDirector server. Click to **Remove new documents after Check in** to activate and deactivate this setting.

Remove revised documents after check-in

When activated revised document are automatically removed from the local list when they have been checked in to the FileDirector server.

Click to **Remove revised documents after check-in** to activate and deactivate this setting.

Remove local documents after sending to process

When using the process management the documents which are sent to a process are saved in the personal folder of the users. If a document is to be deleted after an action is taken by the user, e.g. approve/reject, this option can be set.

Don't remove from search result list

After changing of index a document is 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 anymore after the index change.

Auto. Check-In new documents

If new documents are created, they are normally stored on the local document list on the work station and have to be checked-in from this list. With this option new documents are immediately checked in. If index has to be changed or added, they have to be checked out again.

Auto. Check-in new documents after edit

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

Click to **Auto. Check-in new documents after edit** to activate and deactivate this setting.

Auto. Check-in revised documents after edit

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

Click to **Auto. Check-in revised documents after edit** to activate and deactivate this setting.

Reminder to check in new documents on program exit

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

Click to **Reminder to check in new documents on program exit** to activate and deactivate this setting.

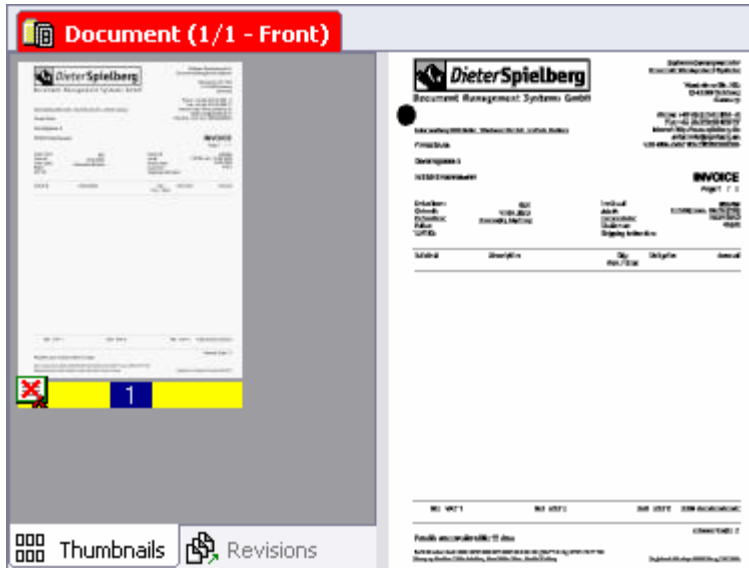
Reminder to check in documents on program exit

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

Click to **Reminder to check in documents on program exit** to activate and deactivate this setting.

Check integrity of unsigned documents

A check sum, a so called "hash code" is being generated for each document. When changes of the data of a document are made in the file directory of the server, the check sum does not match with the original data. Therefore you can check a manual change of the data which will be displayed with a red icon in ther WinClient.



Language

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


- English (UK)
- English (US)
- Deutsch
- Français
- Español
- Dutch
- Japanese
- Korean
- Chinese (Big5)
- Chinese (Simplified)

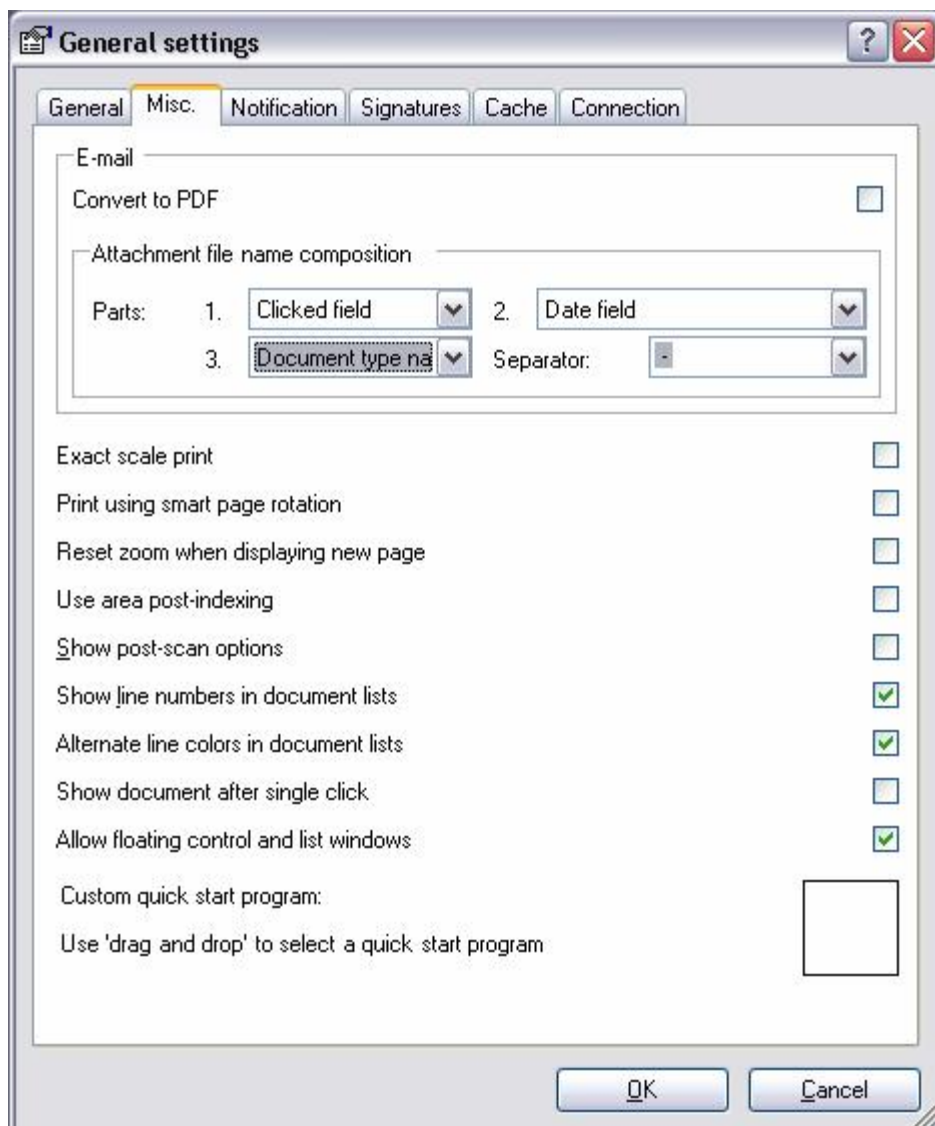
If you switch to select a different language select a language from the drop down list and click to **OK**. Afterwards WinClient has to be restarted.

Delete MRU List

With the MRU lists (most-recently-used) the entries are listed which are already typed in. To delete the MRU lists, use **Extras** → **Options** → **delete MRU list**.

Misc.

To change these settings click to **Options**  from menu **Extras** and select tab **Misc**. If settings are changed they are stored by clicking to **OK**.



Hint:

Even if the usage of the options properties by a client configuration is not enabled, the properties of the tab "Misc." are available although, because these settings should be adjustable differently for each workplace.

Convert to PDF

With this option set the documents which should be appended to a new Email (**Send to ... Email**) are automatically converted to PDF and then appended. If you want to change this setting click to **Convert to PDF**. If this option is not set documents are appended in original file format (tif, jpg, Edoc).

Assembling of file name for Email attachment

In these optional settings the file name can be build, which is used to attach a file to an Email. The separator is the character to be used between the single parts of the name.

[See → Send and Receive](#)

Exact scale print

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

To activate or deactivate this setting click to **Exact scale print**. This option is mostly used to print scanned construction plans and maps in original size.

Print using smart page rotation

As a document is printed the page format is fit 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 different rotated on several printers.

Reset Zoom when displaying new page

With this option set the zoom factor is not kept if the display switches to a new page.

To activate or deactivate this setting click to **Reset Zoom when displaying new page**. This option is useful when indexing several similar documents manually where the zoom settings should be kept.

Use area post-indexing

If this option is set, the zoom parameter is saved for each index field individually. This allows for a fast and easy manual indexing. If the field contents are always located at the same position, the zoomed part always “jumps” to the right location.

Show post scan options

If this option is checked, a window appears after batch scanning, which allows controlling the next actions manually:

Save scanned pages

The scanned pages are stored as one document.

Scan new batch

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

Continue scanning

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

Delete last page

Sometimes index- or separation pages are inserted between the documents. If this option is set, 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 the hit list.

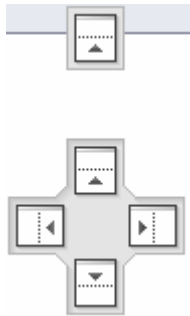
Rotational line colours in document lists

Providing a better overview of a hit list the lines can be shown in rotational line colours. The colours of the lines are forced by the system.

Show documents immediately

By selecting this option the content of a page will be shown immediately after the first click on this page and it is downloaded to the local cache. When this option is not selected the page will be shown and downloaded only after performing a double click.

Allow floating control and list windows



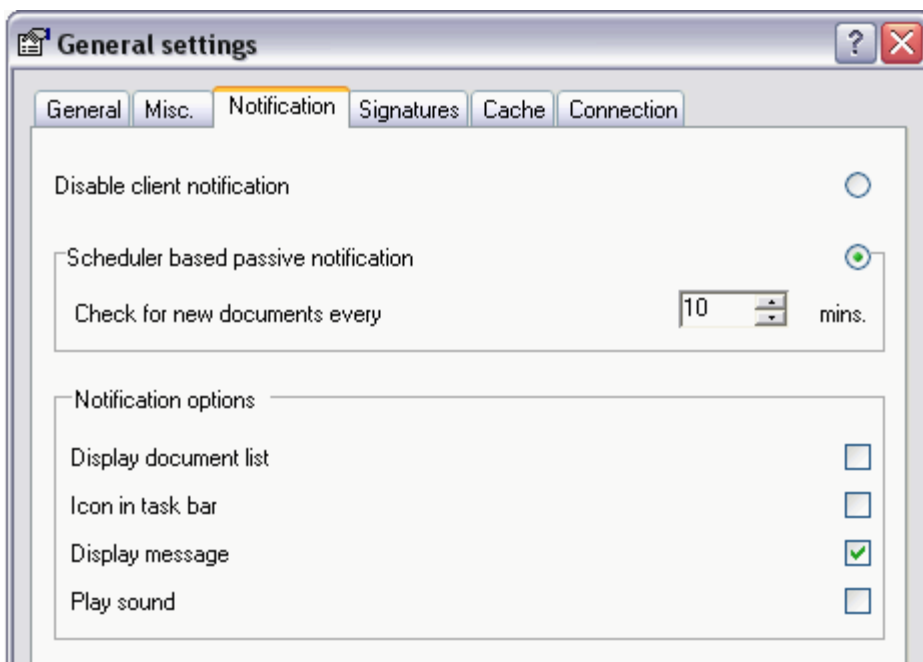
Dynamic arrows showing possible positions appear during positioning of control bays and lists via drag&drop. Providing this way of free positioning, this option can be set. When this option is disabled, control bays and document lists can not be moved freely.

Custom quick start program

When Component services are installed an Office quick start toolbar is created in WinClient. Office must be installed on the PC. This quick start toolbar can be expanded by an additional application which should be available very quick from FileDirector. This application is added by a Drag and Drop operation.

Notification

To change this settings select **Options**  from menu **Extras** and select tab **Notification**. If settings are changed they are stored with clicking **OK**.



With these settings a notification can be switched on and configured for the arrival of new documents on the personal list.

Disable client notification

Select this setting if you do not want to be notified if a new document has arrived on your personal folder.

To activate this setting click to **Disable client notification**.

Hint:

Note that if notification is switched on the client will connect to the server in a fixed schedule. This may prevent that the license used is freed again and thus blocked. A manual pick up is possible with key F5.

Scheduler based passive notification

Select this option if you want to be notified upon arrival of new documents on your personal list.

To activate this setting click to **Scheduler based passive notification**.

Specify the interval in minutes which WinClient should use to check for new documents in your personal folder. Select the types of notifications in **Notification options**.


Notification options

Select any combination of the available notification types for your personal folder.

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 notification for the arrival of new documents in your personal folder. The number of new document is displayed if you position the mouse cursor on the folder icon.



Display message:

As notification a message window is opened, which informs you about the arrival of new documents in your personal list.

Play sound:

As notification a sound is played, which informs you about the arrival of new documents in your personal list.

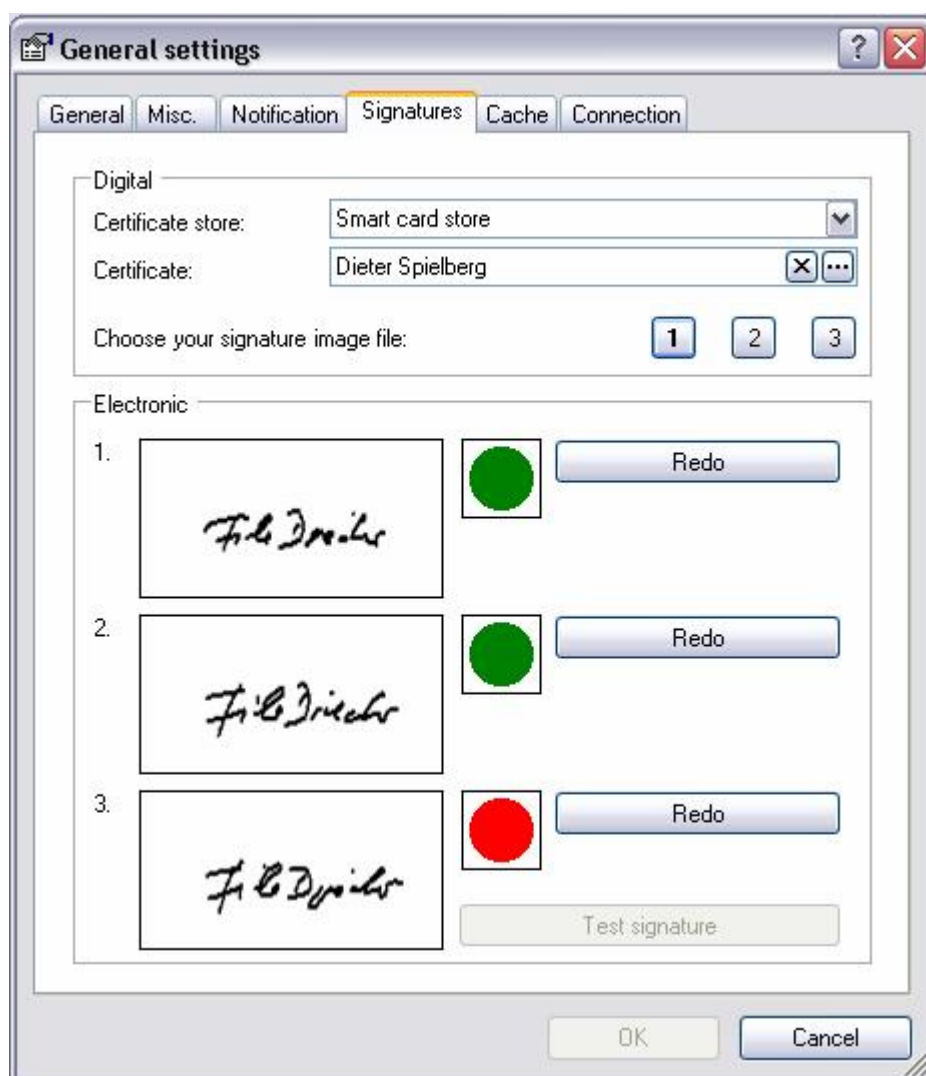
Signatures

Sign documents

There are different ways in the FileDirector to sign a document. You must differ between an electronic signature and a personal sign.

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

In comparison to that a personal sign is a way to sign a document similar like on the paper.



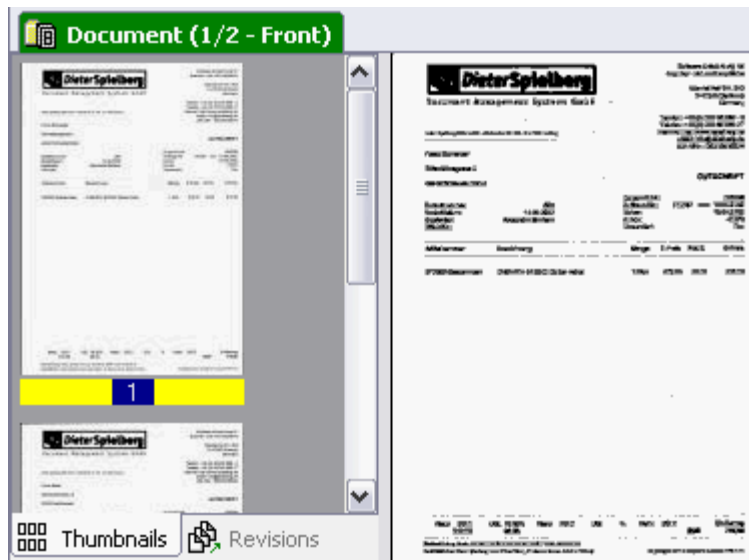
Load a certificate

When a document type is configured only to accept signed documents, the user needs a certificate. This certificate must be provided to him and can be loaded from the appropriate storage or storage medium.

The following stores (possibility of saving ?) are selectable:

AD user store (Active Directory user store)
Current user store
Smart card store

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



Using of a scanned and stored personal sign

Usually a document must be signed on the paper before it is scanned. With FileDirector you can place a scanned signature into the tif file later.

To use this feature you must scan your signature and load it with the command „Choose your signature image“. A password must be defined for the user to ensure that only the right user has access to his signature. Every user can predefine three signatures e.g a normal signature, a short signature and a legible signature. For all three signatures the password must be identically, because only one password is requested when the user set the signature as annotation. If there is already a password stored, the button with the number will change to boldface.

When a signature is set to a tif file, it is dedicated to the picture. Use the command “Annotations → signature” from the right mouse context menu in the page view to set a signature.

To set the signature the password must be entered now.


Define electronic signature for processes *

In this area you can define a signature with a special sign pad to use it later in a special process action.

E.g. a process can be defined when a document is approved by using a signature. The next step of the process is only done if the signature is valid.

→ Read for these settings the topic „Sign documents“ in the chapter „process management“.

Cache (local)

To change this settings select **Options**  from menu **Extras** and select tab **Cache**. If settings are changed they are stored with clicking **OK**.



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

Purge Cache after program exit / logout

When this option is active all copies of the recently displayed documents are deleted if you close the WinClient or log off. If this setting should be changed, click to **Purge Cache after program exit / logout**. If this option is set but WinClient is running for a long time the cache is automatically deleted after 12 hours to prevent large amounts of data to collect in WinClient cache.

Document storage cache (Cache Directory)

The storage location for the local cache is displayed here. Normally the cache is located in a subdirectory "FileDirector" under "My documents" on the workstation. For each user of WinClient on this PC an own directory is created.

The setting of the cache path can only be viewed here. The configuration is done via the Windows settings of directory „My documents“.

If the local cache should be controlled with a server profile, the administrator can specify a configuration to relocate the local cache.

(→ see Installation Guide)

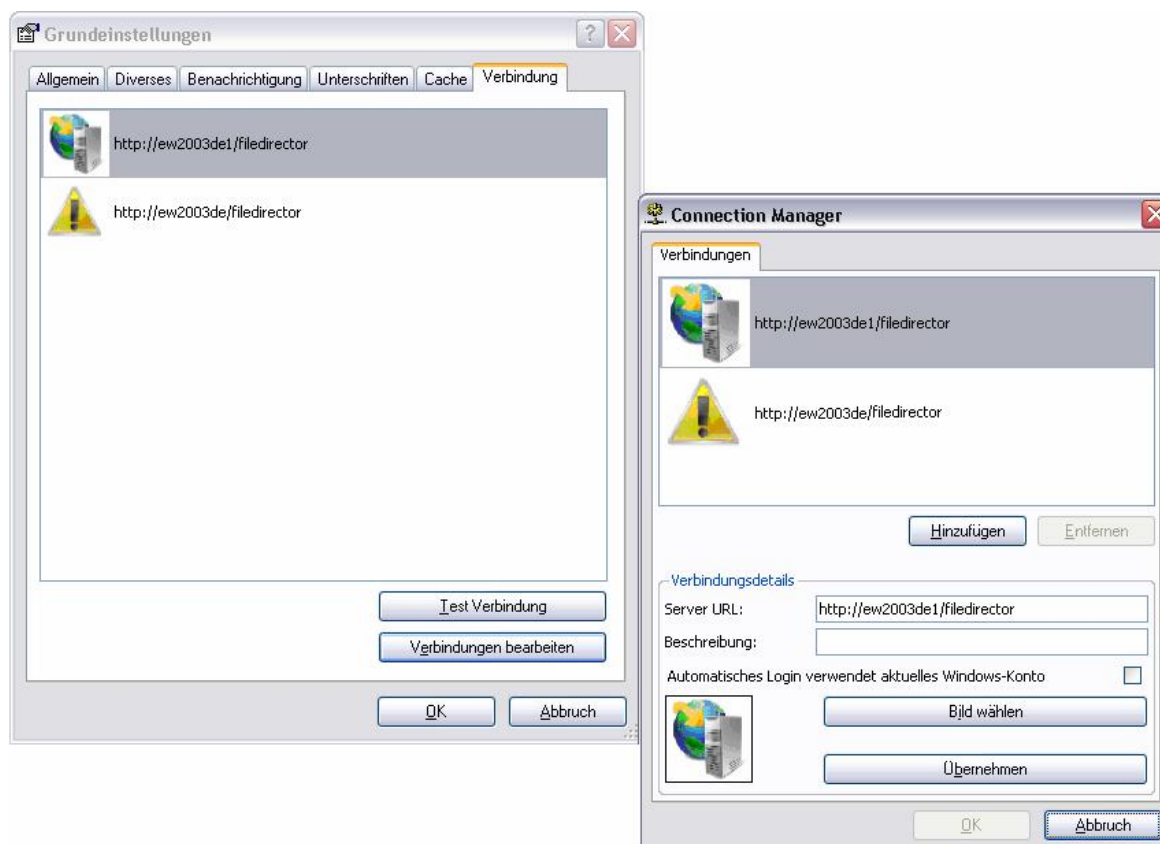
Connection

To change this settings select **Options**  from menu **Extras** and select tab **Connection**.

Multiple connections can be established to different servers, though one connection to one server is the normal case. The effective connection is selected and confirmed by clicking OK. The new setting will be applied to the WinClient with the next start up.

Hint:

The connection with multiple server is available from version 2.0 on. A WinClient version 2.0 should only be connected to a server version 2.0. Error messages can arise if a connection to a server of an earlier version is established.



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

If this window appears when starting WinClient ask your system administrator for the address of the FileDirector server and enter the URL of the server. If the connection settings are made once they are stored in file **Settings.fdl** in local Cache of WinClient.

Server URL

With “Edit connection” settings for the server URL become available. This setting holds the location of the FileDirector server. The connection is automatically set if the WinClient was installed via the installation page of the FileDirector server on the client machine.

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

whereas:

server name denotes the name server in the network, where FileDirector is installed.

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

With button ***Test connection*** the connection to the server can be checked with an account known to the FileDirector server. When logged in correctly it is displayed in a message window.

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 name and password of a valid user account. Normally the login should be automatically using the current Windows account, because in this case each local cache is assigned properly to the relevant user and is only accessible by himself. Which setting should be used in your environment is up to your needs and must be configured by an administrator.

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

Set up Image

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

Help

Content / Index/ Search

These menus open the online help of WinClient.

Check for updates

If a new update for WinClient is available on the server an automatic update can be performed with this function. This function is available if the installation is carried out with the browser installation page of FileDirector. Ask your administrator when using this option.

Info

Info displays the version number and the licence information of the FileDirector server. Certain functionalities might not be available in your system because they are optional and are not included in your licence.

Keyboard control

F6	Control box Search
F7	Control box Edit
F8	Control box Scan
Strg + F6	Search results
Strg + F7	Local Documents
Strg + 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 fullscreen mode

Plug-ins for WinClient

What is a Plug-in?

Plug-ins are small additional functions, which have to be explicitly installed on the work station. Not every work station needs these functionalities. In this way customized functions can be developed to make the system more versatile for a special environment.

Installation of Plug-ins

The plug-ins are located on the FileDirector installation CD in directory plug-ins. For installation these files have to be copied into the plug-ins directory of the WinClient application directory:

:\\Program files\\Dieter Spielberg DMS GmbH\\FileDirector WinClient\\PlugIns

Enable the menu of the installed plug-ins

To use the plug-ins after the installation you need to add the buttons to the menu. This can be done with the menu customization if the changes are allowed for the user. If the user must not change the menus because of a general client configuration, the administrator must activate these buttons in the menu with the client configuration in the Enterprise Manager.

Requirements for OCR Plug-ins

Since this plug-ins perform an OCR recognition, the Component services and the OCR engine must be installed on the server. Note that for usage of OCR a licence is required, this function is only available if the work station is connected to the server (online).

Update of the plug-Ins for version 1.5

The plug-ins were adapted to the FileDirector version 1.5 and have to be updated in case you used plug-ins in earlier versions.

Point and Shoot (OCR Index – Zone recognition)

With Plug-in OCR Index it is possible to drag a reading zone and directly move the recognized information to an index field – independent if zones for forms recognition are configured. This function can also be used for scanned pages which are not suited for automatic indexing using forms recognition/OCR.

Manual OCR zone recognition



This button appears in WinClient if the OCR Index plug-in was installed.

- Select the document to be indexed and display it.
- Activate tab **Edit**
- Select the index field to be filled
- Activate the plug-in button
- Drag a zone around the information to be read.

OCR-Calculator

Plug-in OCR Calculator allows adding units and prices. If this information is listed properly on an invoice, they can be read by OCR and be listed in a calculation table.


Adding of units and prices



This button appears in WinClient if the OCR Calculator plug-in was installed. For OCR calculator you need a scanned document which lists units and prices in columns. Select the document to be read and display it. Activate the plug-in button and drag a zone around the listed units and prices. Now a window appears where the units and prices are listed in a grid. For quick calculation the entries can be modified.



CallTo – Reading of telephone numbers

Plug-in CallTo  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 anymore, so that this number can automatically be passed to a defined application using the „callto://“ - function from windows.


Such an application could for example be a telephone application like Swyx. More information about this application can be found at: <http://www.swyx.com>.

Setting of a default country code:

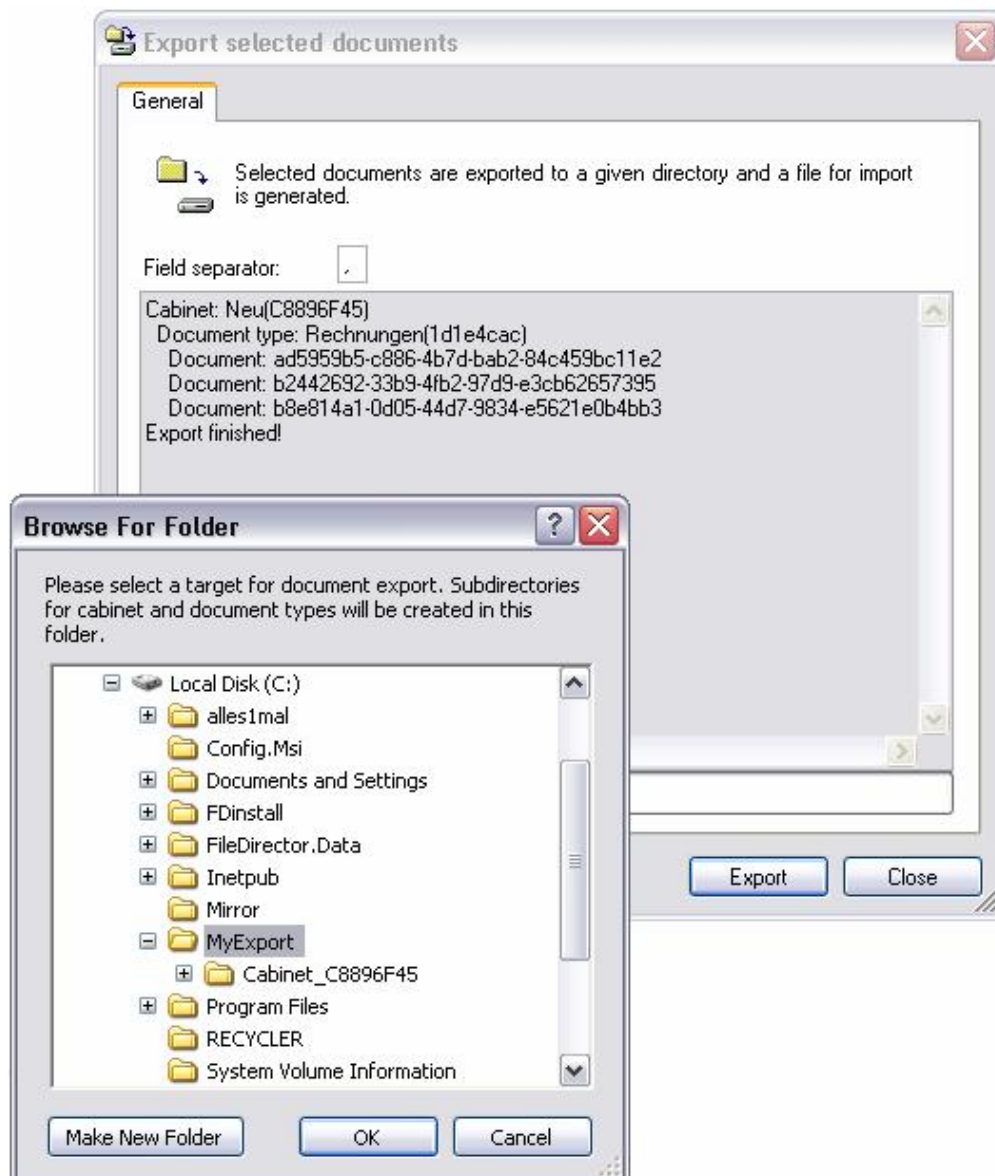
```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <!-- User application and configured property settings go here.-->
    <!-- Example: <add key="settingName" value="settingValue"/> -->
    <add key="CountryPrefix" value="+49" />
  </appSettings>
</configuration>
```

If a standard country code should be 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 set.

HitListDocumentExport (Export Documents)

This plug-in  can be used to export documents. It creates an export file from the selected documents, which can be imported by WinClient.

Select the documents to be imported. The following window appears. A file separator must be defined which is used in the import file. Click to “Export” and select the target director for the documents to be exported.



A subdirectory named like the cabinet ID is created in the selected directory. The documents are written as subdirectories named with the document ID. Additionally an index file with suffix “.dat” is created, which contains the index data listed with the relevant TIFF files:

Example for 20050718_155717.dat:

Rita,Meier,,,\ad5959b5-c886-4b7d-bab2-84c459bc11e2\20050715 13429991.TIF
 Rick,Roll,,,\b2442692-33b9-4fb2-97d9-e3cb62657395\20050715 13429835.TIF
 Ina,Mock,,,\b8e814a1-0d05-44d7-9834-e5621e0b4bb3\20050718 15370147.TIF

Hint:

An export with this plug-in exports the last version of a document – without revisions and annotations.

To import this data see section → [Import documents](#)

Global Count (manual global counter)

With the plug-in „Global count“ a counter can be set manually. The counter of an optional field is saved in the table “settings” of the configuration database FD_Config. The counter is stored in the column FD_Key with the key “GlobalCountPlugIn”.



FD_Key	FD_Value	FD_ValueBin
GC_CF82A2EB	1	<Binär>
GlobalCountPlugIn	0	<Binär>
*		

The field 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 also can contain alphanumeric and corresponding values count up like ‘abx’ -> ‘aby’ -> ‘abz’ -> ‘aca’ ...

If no value is found in the database (first use) ‘0’ will be set. The value can be changed in the database with the SQL Enterprise Manager.

Hint:

This counter doesn't need a field with the properties „increment (global)“, because this is an automatic server function.

Usage in WinClient



After the installation of the plug-in this button is available.

When the XML file is configured with a valid field, it is filled with the next counter with each click on the button.

When multiple pages are to be entered with the same counter close the window of the current document and mark several documents. By using the button all selected documents will be filled with the counter.

ResponseWriter (generate response writings)

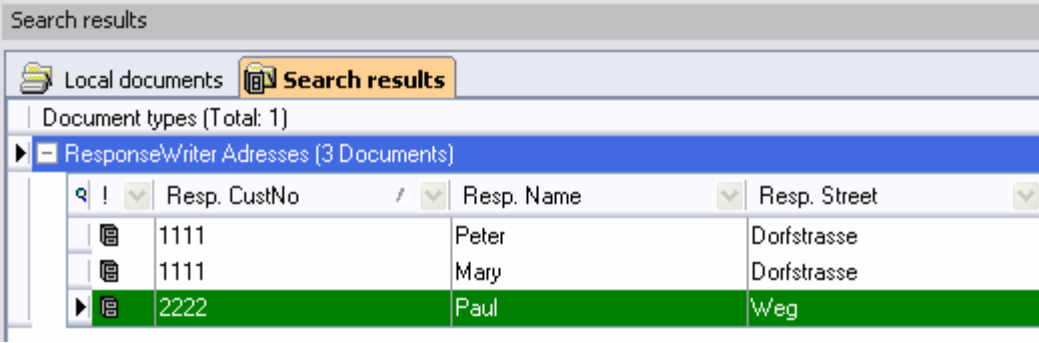
The plug-in “Response Writer” is meant to fill an automatic response writing with the index data of an archived data record or with the index data of a linked data record.

Example

You have two document types:

1) One document type with address data of customers and a customer ID as a clear connection.

CustomerID, Address, Name, Email, Phone, Street...etc.

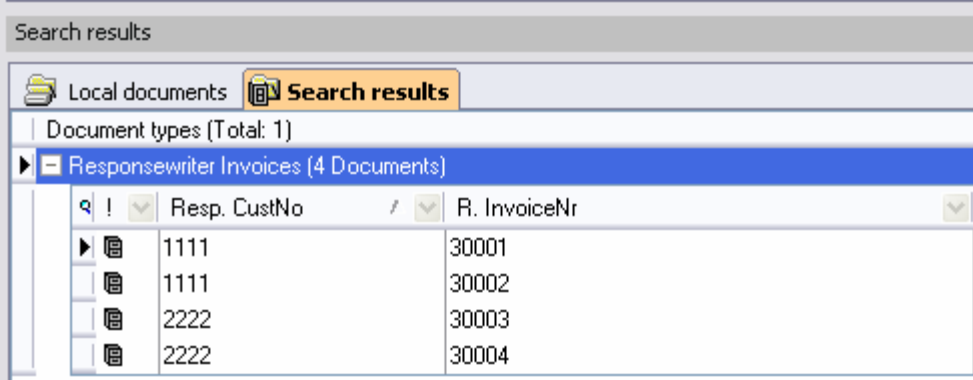


The screenshot shows a 'Search results' window with a table of customer addresses. The table has three columns: 'Resp. CustNo', 'Resp. Name', and 'Resp. Street'. The first two rows have a customer ID of 1111, with names Peter and Mary, and street 'Dorfstrasse'. The third row has a customer ID of 2222, name Paul, and street 'Weg'.

Resp. CustNo	Resp. Name	Resp. Street
1111	Peter	Dorfstrasse
1111	Mary	Dorfstrasse
2222	Paul	Weg

2) Another document type with invoices containing customer ID as well.

CustomerID, Invoice number, Date ...etc.



The screenshot shows a 'Search results' window with a table of customer invoices. The table has two columns: 'Resp. CustNo' and 'R. InvoiceNr'. The first two rows have a customer ID of 1111 and invoice numbers 30001 and 30002. The last two rows have a customer ID of 2222 and invoice numbers 30003 and 30004.

Resp. CustNo	R. InvoiceNr
1111	30001
1111	30002
2222	30003
2222	30004

Now you want to generate a response to a customer for an invoice out of the second document type whereas the address data of the first document are to be filled in automatically into the correspondence.

Installation

Copy the plug-in "ResponseWriter" to the program directory of the WinClient. This directory also contains the XML-file "DSDMS FileDirector ResponseWriter.xml" which has to be edited for configuration.

Configuration

Please acquire the CabinetID, the document type ID of the first document type with detailed address data (DetailsDocType), the fieldID of the connection field (here: CustomerID) and the ID's of the fields from both document types you want to adopt later on to the correspondence.

Please 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="«°Customer No.°»" />
  <Mapping FieldID="CCA3175B" Name="«°Invoice No.°»" />
</Cabinet>
</Configuration>

```

The following <tags> must be filled in file:

Cabinet ID

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 in the mask „Select details“ if several entries are available for one customer ID

<Mapping FieldID="90511262" Name="«°First name°»" />

The mapping fields are fields which contents are filled in later on into the correspondence and are “extracted“ from the document type. You can either fill in the ID in this way [FD_3795A51F] or the definition which was set as name of the field: «°First name°».

The address field of a word-file which is to be filled with the defined fields can look like this, for example (here: Testvorlage.doc):

```


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

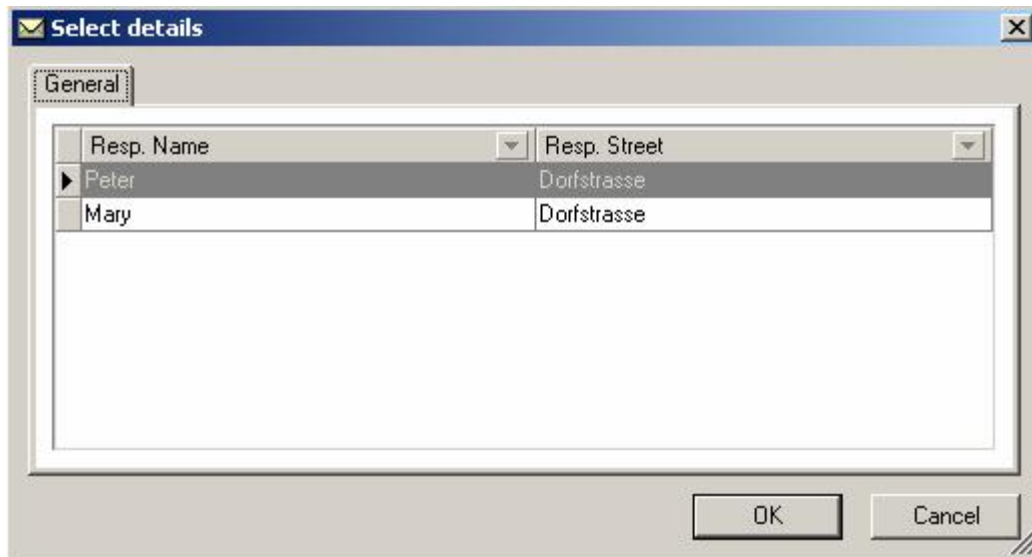
Your invoice:      «°Invoice number°»

Dear Sir or Madam,

```

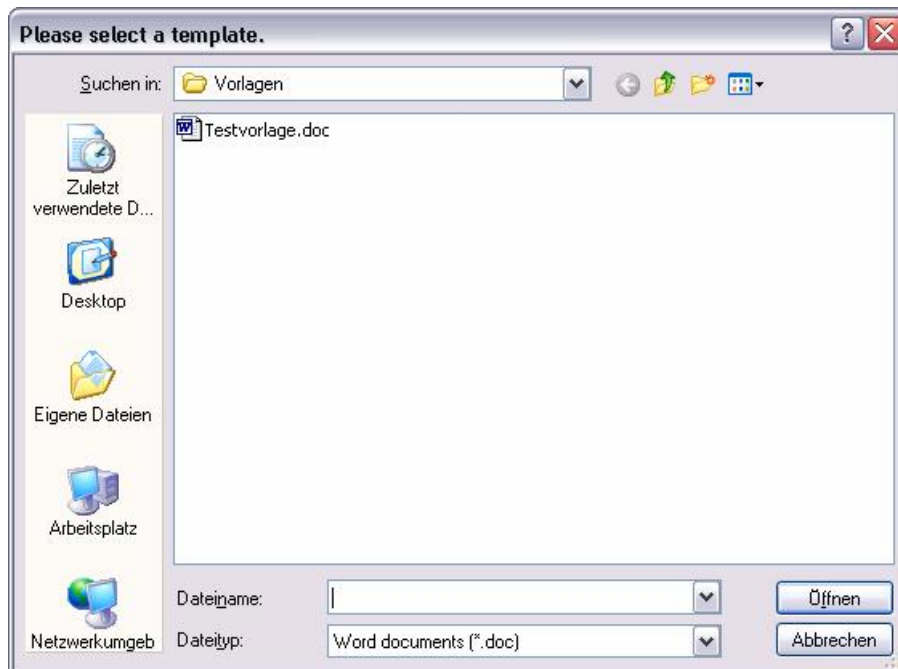
Procedure/usage after configuration:

Select an invoice a click on the icon  for the plug-in.



Since our example provides for the customer number 1111 two entries respectively two contact persons, a mask for selection is provided.

Selecting one contact person and pressing OK you can choose a template from the template path set up in the XML-file which is filled with the accordingly configured fields.



ClearUI – Reset user interface



If the plug-in „ClearUI“ (Clear User Interface) is installed in the plug-in of the WinClients, you can reset the user interface by using the brush to provide a better overview. Using this function all index fields are cleared and the opened documents are being closed. Only the local list will remain opened and only the new or non-checked in documents are shown.

Create Retrieval CD/DVD *

What is a Retrieval CD/DVD?

Data including a retrieval facility can be exported to CDs or DVDs. These data can be used for retrieval without any usage of a FileDirector Server. A special retrieval client is available to control these data. 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/Tickers

A so called 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 have all been collected, this collection must be licensed with a ticker. Only when this ticker licensing has been executed, the data can be processed by the retrieval software.

A licensed CD or DVD can copied without limitation and without requiring new tickers. If data is amended to an existing licensed collection, a new ticker is needed. If a collection of documents needs more space than available on the relevant disk (CD or DVD), the data are divided into several directories. These directories can be opened by the retrieval client as separate cabinets. For each directory an own ticker is required.

Hint:

The number of available tickers can be displayed in WinClient under Menu „?“ – Info.

In order to purchase tickers please contact your FileDirector dealer.

Creation of a retrieval CD

If you want to export documents to a retrieval CD, select the documents to be exported. Afterwards go to **file** → **Export** → **Retrieval CD/DVD**.

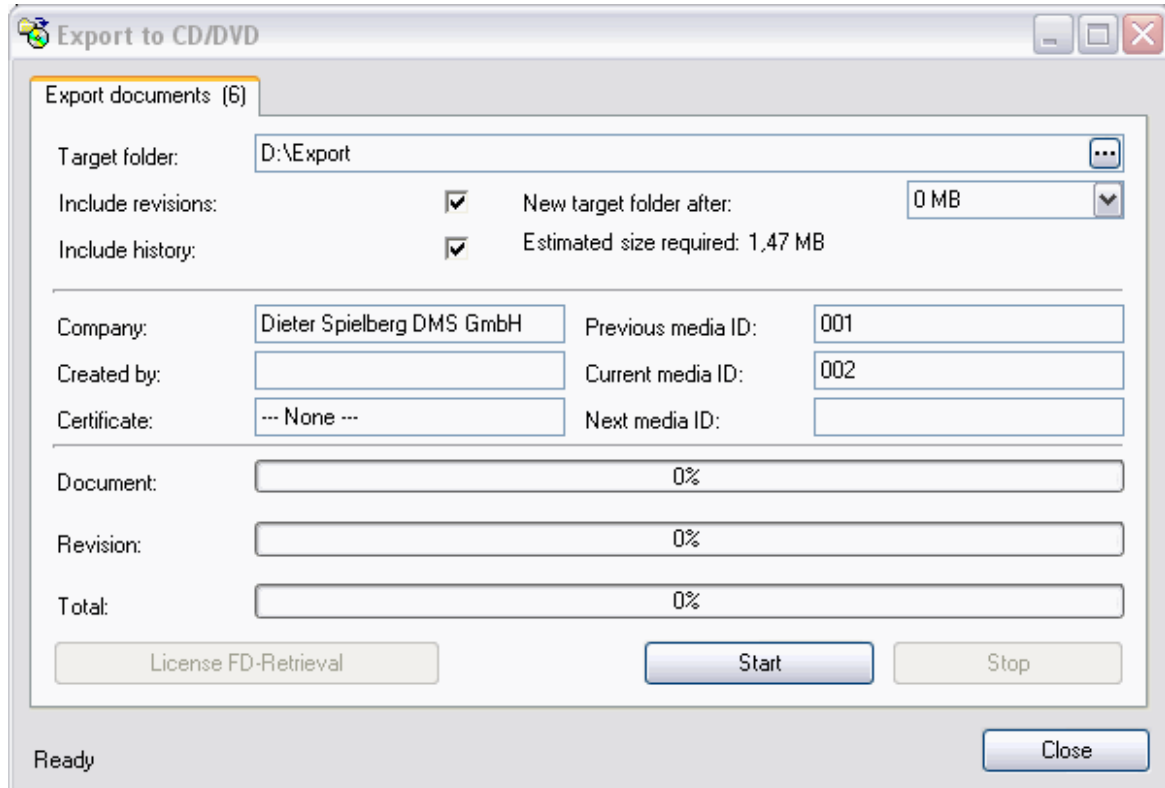
If documents from different document types should be exported, they can be assembled step by step without having to licence each time after exporting. It is possible to create a document list containing more documents than the currently set maximum number of displayed documents.

A number of documents can be added to an exported cabinet at any time. If the exported cabinet was already licensed with a ticker, a new ticker will be necessary. When it has not been licensed by a ticker yet, any number of documents can be added and you need a ticker for licensing only at completion.

Hint:

The maximum number of documents to 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.

(See → „Number of hits “in Installation manual)



With these settings a directory is created containing a cabinet directory holding the data and a file Cabintes.XML in the same path.

Target folder

The exported data are stored in the target folder. A subdirectory with the cabinet ID as name is created. A file CABINTES.XML is created, which is later opened by the retrieval client. Additionally a licence file and some more XML files are created, which describe the contents of the cabinet.

Include revisions / history

If revisions should be exported as well, this option can be clicked. Please note that the user exporting the data should have the right to display revisions. Otherwise the data can not be exported correctly.

Hint:

The export of full text is not supported.

New target folder after:

The size of the target directory is specified here. 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 should also be copied to the disc.

General information

The companies name and the name of the user exporting the data can be stored here.

Certificate

When using a certificate the export can be executed 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 are created from a trusted source.

Media ID

Each new CD 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 FD 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.

Create a CD/DVD

FileDirector does not contain or control CD/DVD software, the exported data cannot be written directly to CD/DVD. Data are always written to an export path, which should not exceed the space available on the disc to be written. Even the exported data have been licensed; this collection of data can be written to CD/DVD.

FileDirector Retrieval Client

A special retrieval Client is necessary to retrieve the data from a disc. This retrieval client must be available for the people, which want to use this disc. The retrieval client can either be written additionally 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 directory \Setups FileDirector Retrieval Setup.msi.

For installation log on to the system as administrator user and execute the *.msi –File. Follow the installation instructions displayed on the screen.



FileDirector
Retrieval

After installation is finished the displayed icon can be found on the desktop. Double clicking this icon starts the FileDirector retrieval client.

Hint:

FileDirector Retrieval Client can also be installed on a computer having FileDirector WinClient installed.

Open cabinet with retrieval client

After starting retrieval client a dialogue for opening of a file appears. Now file Cabinets.xml must be opened, which was created during export. An exported cabinet can only be opened by retrieval client if it was licensed before.

FileDirector retrieval client generally is comparable with a limited WinClient, i.e. it has less functions. Therefore descriptions about the functionalities can be taken from the WinClient documentation.

The local cache

In the local cache all new scanned, checked out, downloaded or only viewed documents are saved automatically.

In version 1.4 or later only the actually displayed pages of a document will be downloaded and not all pages of the document. Therefore the time to load is much shorter when you are working with large documents. If you want to work offline with the documents, please read the section “The offline mode”.

Hint:

The local cache is automatically created. Here no manual or other changes should be made. This can lead to errors during the start of the WinClient or the local list can not be displayed anymore.

Storage location

After a default installation the local cache is in the folder \FileDirector in “My documents” of every user. The administrator can move this folder to another folder if e.g. server profiles are used (see installation guide).

Structure of the local cache

In the folder FileDirector for every logged-in user the settings of the WinClient are written to a folder. In this user folder a folder 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 with the data are saved in a folder, which contains the revisions and pages in a folder \files.

Cache is deleted automatically

With the setting in Extras→Options →Cache “Purge cache on program exit/log-out”. All documents which are viewed and not visible in the local list are deleted in the local cache. In the file “Docmanager.xml” these documents are labeled with the entry `<IsTemp>true</IsTemp>`. All local and checked-out documents persist.

If the local cache, that means the folder “FileDirector”, is completely deleted, it is new created with an empty local list after restarting the WinClient. When the file “settings.fdl” was also deleted, the URL connectionstring to the server must be entered at the first start of the WinClient.

Office Link

The folder Office Link is created when you use the component service. Here are saved documents which are archived with the index capture mask, e.g. documents are archived from the windows explorer with the command “send to...FileDirector”.

Component Service

The Component service is installed to manage the different processes. It monitors the process “Edoc Engine” and the process “IPRO Engine”. The Edoc engine and contains the stellent viewer which can display electronic documents (see → Document formats that can be displayed). The IPRO Engine enabled the OCR recognition and is installed with the “Western OCR Engine”.

Document formats that can be displayed

Document formats

Together with the Component Service the Outside In Stellent Viewer is installed as he is able to display different file formats without the corresponding application needs to be installed.

Via the following web site current supported formats can be downloaded as pdf-file.

<http://www.oracle.com/technologies/embedded/docs/OutsideIn-Files-datasheet.pdf>

Hint:

The Stellent Viewer Version 8.2.0 has been part of the Component Service since 10.12.2007

(The formats are not listed anymore for updating and copyright reasons.)

Avoiding Stellent Viewer in WinClient

When using formats that are not supported by the Stellent Viewer or having trouble with displaying these files via the WinClient, the Stellent Viewer can be avoided for these formats.

Settings for the Client

To apply this setting to a single client, add an entry to the configuration file app.xml.

This file is stored in the program path of WinClient. C:\Program Files\Dieter Spielberg DMS GmbH\FileDirector WinClient.

In this file app.xml you find the following entry:

```
<appSettings>
  <add key="NoStellentFor" value=".xml;.htm;.html;.mht" />
</appSettings>
</configuration>
```

Add the format that is not to be used by the Stellent Viewer.

Hint:

Please keep in mind that this setting will be overwritten after an update. When this setting shall remain after an update, the setting must be done before the installation on the server in app.xml.

Settings for all Clients before the installation

You can find a file named app.xml in the installation data. This file contains the entry described beforehand, too. If this entry is added on the server (directory inetpub\wwwroot\FileDirector\Setups\WinClient\app.xml), the entry is written into the app.xml of the program directory.

Hint:

It is insufficient to add this entry only to the app.xml in the WinClient program path on the client, because the file will be overwritten by the server app.xml when the next update is executed. The settings on the server must be done by an administrator.