DOCUXPLORER

DocuXplorer Manual

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When checked this option remember the last entered value and is maintain in the "Use this value when adding a new document" field described below. If a user defined variable is placed in the "Use this value when adding a new document" field below, the last entered value is maintained in the folder properties where the variable was defined. As a result each folder could maintain its own default values.250

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Product Overview

Product Overview

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Welcome to **DocuXplorer,** the most flexible and easiest to use document management and archiving software available today. DocuXplorer solves the problems faced using a manual paper document filing system alongside an electronic document system by:

- Providing an electronic document management system that is easy to learn and use
- Complying with government regulations concerning financial documents (Sarbanes-Oxley, SEC and FINRA regulations),manufacturing documentation (ISO) and patient and client confidentiality (HIPAA)
- Freeing up costly storage space and drastically reducing the costs of paper document copying and distribution
- Combining both computer-generated and paper documents in a secure and effective document storage and retrieval system
- Providing multiple methods of adding documents and indexing information quickly and easily
- Providing the ability to batch scan documents
- Providing complete indexing with auto indexing features allowing for fast and accurate retrieval of related documents based on a query by word or phrase
- Allowing full text search of scanned image and electronic document content
- Search engine allows Boolean and Proximity searches
- Eliminating time-consuming physical searches due to misfiled or lost documents
- Allowing the creation of workflows using DocuXplorer's exclusive " Saved Search Documents"
- Extending workflows outside DocuXplorer to the desktop or as an attachment to an e-mail
- Providing the ability to export workflows as Saved Search Documents to the computer's Desktop to automatically run DocuXplorer and open the workflow
- Allowing users to e-mail workflows as attachments to notify coworkers that documents are ready for viewing or modification

- Allowing users to revise, create versions, annotate and share documents with a workgroup
- Allowing users to save electronic documents in the same location as scanned-in paper documents
- [Providing extended database capabilities](#) to store data records along with documents
- Providing extensive security measures to keep confidential documents safe from prying eyes
- Keeping an audit trail of every action taken on or with a document
- Providing easy access via the Internet for remote computers
- Allowing the import of index data from external sources to reduce index data input time
- Allowing users to see who has viewed, modified, e-mailed or printed any document using the Document Event Log

DocuXplorer Products

DocuXplorer Personal - a single user edition of the program that runs on a single computer. Personal has all the features needed for personal use.

DocuXplorer Professional - a single-user edition of the program that runs on a single computer. Professional has all the features found in Enterprise including full security, document event logs and more.

DocuXplorer Enterprise - a multi-user document management system that is fully featured. Enterprise licensing is by concurrent

user so that the program can be installed on every computer in an organization but only licenses for thee number of simultaneous users need to be purchased. DocuXplorer Enterprise is scalable from one to thousands of users.

Hardware and Operating Requirements

DocuXplorer can normally be run using existing hardware: Windows 2003 or later operating system with Internet Explorer 7 and .Net Framework 2.0 installed prior to the installation of DocuXplorer. Workstations require at least 256 MB RAM (512 MB or more Recommended). For multiple users, a network server running Microsoft Server, Novell, or Linux network operating system and Sybase Advantage Database server software. If there is a large number of documents to store, it may be advisable to add a large hard drive to the network for document storage. As with any enterprise, an adequate backup system should be in place. A scanner with an auto-document feeder is required to store paper documents; scanner speed will depend on daily scanning needs.

Application Design

DocuXplorer is modeled on the same physical dynamics you use in your existing office environment. Storing and finding documents is accomplished using standard Windows conventions and a familiar hierarchical tree structure in a Virtual [Library](#) that contains [Cabinets](#). Cabinets contain [Drawers](#). Drawers contain [Folders](#) that hold [Child Folders](#) and/or [Documents](#) .

DocuXplorer uses no proprietary formats: all documents are stored in the database in their original format and can be exported from the database back to a hard drive. Documents are secured within the database for easy administration of user permissions. The database also provides a Document Event Log as an audit trial of every event performed on a document as well as who executed the event (digital signature) and the time and date the event occurred.
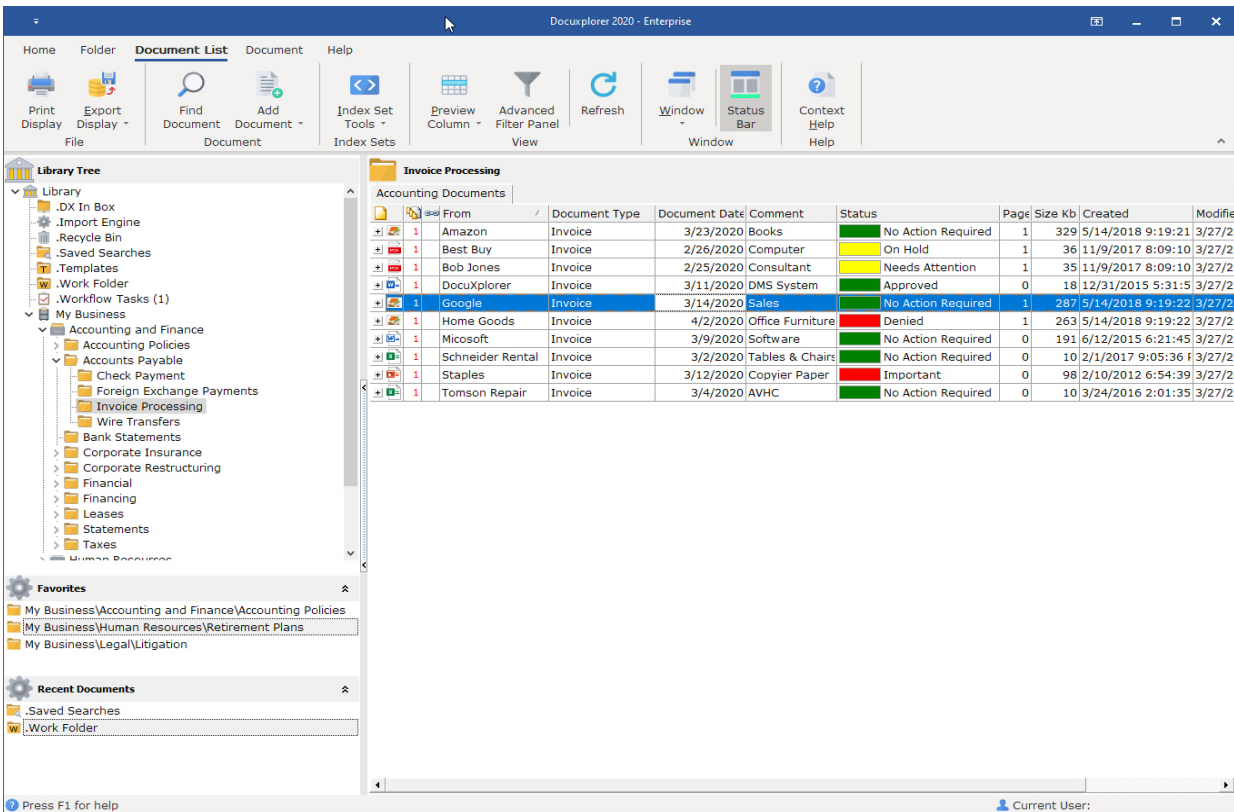
The DocuXplorer Desktop is central to all your interaction with the program and with DocuXplorer's ability to easily create an effective index structure the program allows you to retrieve any document in seconds. Easily move and copy documents using standard Windows conventions. The Desktop also contains powerful features to sort and group documents in a folder by simply dragging and dropping the folder's column headers. Summary Footer Fields can be added to view the sum, minimum, maximum, count, and average of a column.

Security, HIPAA, SEC, FINRA, and ISO compliance

This Help topic refers to the following editions: ☑ Enterprise ☑ Professional

DocuXplorer provides powerful security and audit trail that is in compliance with HIPAA, SEC, FINRA and ISO regulation. Security is based on Users/Groups with permissions to be set for almost every function of the program including the ability to make DocuXplorer objects: Cabinets, Drawers, Folders, Documents, and

Fields invisible to a user based on log-in. The Document Event Log provides an audit trail on every action taken to a document, the operator who performed the action, and the time and date it occurred.

Adding Documents

Adding a document is easy and fast: scan in paper documents individually or in batches, import electronic documents, print images of documents from any Windows program, use the Send To command in Windows Explorer to open DocuXplorer and import the document to a DocuXplorer Folder, or use the DX Inbox to import documents directly from any folder on your network or local drives by simply dragging and dropping the document to a DocuXplorer Folder. Then define those documents using Heads-up indexing - adding a document to **DocuXplorer** displays a Document Window where you can view image or associated application documents while you index them. The DocuXplorer Print Driver can add any printable document to the DocuXplorer Library as a PDF.

Types of documents that can be stored

DocuXplorer Folders store scanned paper documents as either TIFF or PDF along with **any** computer-generated file. With the DocuXplorer Print Driver you can convert stored documents to PDF format or merge multiple stored documents into a single PDF.

Integration with Microsoft Office

DocuXplorer integrates with MS Office products: Outlook, Word, Excel and PowerPoint for seamless workflow. DocuXplorer place a toolbar in Office programs that allow users to save document and e-mails directly to DocuXplorer, As an option you can even set the program to force users to save documents directly to DocuXplorer to assure that all documents are managed within the document management system and are not left outside without an audit trail or security.

User Definable Index Sets

Profile documents with multiple user-defined index fields in an Index Set. DocuXplorer allows up to thirty-three user-defined index fields in each Index Set. To speed index data entry use Auto-Indexing Variables to automatically populate index fields. Configure DocuXplorer precisely to your needs, to provide quick access to all your documents.

Automatic Indexing with multiple Index Field Controls

DocuXplorer provides auto-complete Static Data Fields to create lists of specific relevant data and auto-complete Dynamic Data Fields to enter data in a field once and automatically fill the field from the history list as you start to type. Users can also use auto indexing features to automatically input index data based on a predetermined set of variables for a field including incremental numbering, date, time, document location, e-mail to, e-mail from, and more. DocuXplorer makes index data input quick, accurate and easy.

Finding Documents

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Quickly retrieve documents using the Find Dialog reached by the Find Document button on the Icon Toolbar.
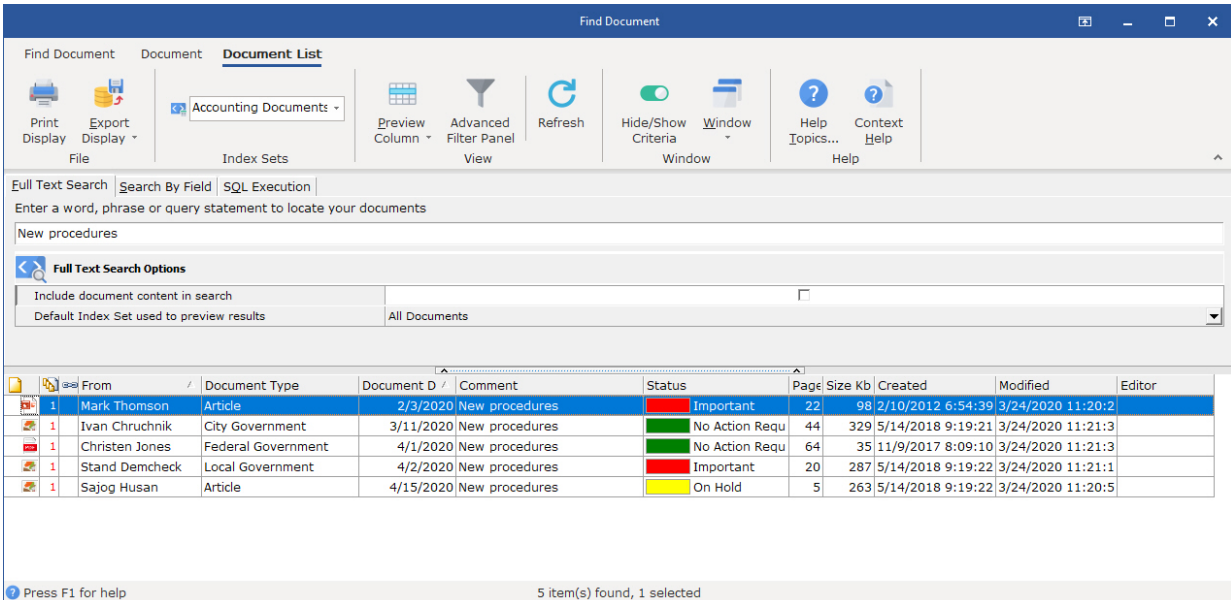
The Search Engine allows for Full Text Searches, Proximity Searches, Index Searches and Saved Searches.

Document Viewing

Use the Image Document Window to view documents that are image files, either scanned in or imported to the database. PDF and Associated Application documents will open the DocuXplorer Associated Application Window for preview during indexing. Computer-generated documents launch their native programs for viewing and editing just as they do in Windows Explorer after adding the document.

Workflow and Save Search Documents

This Help topic refers to the following editions: ☑ Enterprise ☑ Professional

Create workflows in DocuXplorer using Index Fields and Saved Search Documents. To create a workflow a user would create a field for an "Assigned To" name of a user or group and a field for Document Status with a list of statuses specific to your business process such as Requires Review, Needs Action, Ready to Pay,Completed, etc. Searches can then be created for documents from a specific user and a document status (for example: All documents for John and Requires Review). These queries are then saved in DocuXplorer as Saved Search Documents. The Saved Search Documents can be added to any DocuXplorer folder or exported to a hard drive or workstation Desktop. Double clicking on the Saved Search Document will run DocuXplorer and display the search result. Save Search Documents can also be attached to an e-mail to notify users that documents are ready for viewing or modification.

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Annotation

A powerful feature of DocuXplorer are the [Annotation](#) tools. Users can use DocuXplorer to annotate any image document while keeping the integrity of the original document intact. Print documents if needed with or without annotations.

Versioning and Check-in/Check-out

This Help topic refers to the following editions: ☑ Enterprise ☑ Professional

Make changes to a document and DocuXplorer will automatically save those changes with the time, date and author of the edited copy as a edition of the original. Check a document out of the Library to make your edits and users, other than the administrator, can only view the document but cannot edit it until you have checked it back in.

Extended Database Features

Index Information Only documents provide users with a method of storing and tracking data that does not have an image or computer-generated file attached.

Tip:

Use this feature to store data when you have not yet received the paper document - add the Index Information Only document then add the image of the paper document at a later time.

Global access to your documents

This Help topic refers to the following editions: ☑ Enterprise

Using our client/server technology you can install a DocuXplorer client to any computer and have access to your documents anywhere you have an [Internet connection](#).

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What's New

Please use the link below to see the latest update to Docuxplorer
http://www.docuxplorer.com/Support/Release-History

DocuXplorer Limits

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Item	Limit
Number of document windows opened simultaneously on a desktop	Limited only by memory – No more than 6 open document windows is recommended as a maximum.
Maximum Document Size	Limited by memory and processor. Maximum recommended document size is 30 MB. See tip below...
Cabinet Size (Index Database)	NTFS File System - Maximum size is estimated to be greater than 14 terabytes . Default size = 30 GB requires Level 2 Support to increase default size. Fat 32 File System - Maximum size 4 GB.
[Drawer Size (Image Database)](#)	NTFS File System - Maximum size is estimated to be greater than 14 terra bytes. Default size = 30 GB requires Level 2 Support to increase default size. Fat 32 File System - Maximum size 4 GB. Estimated number of pages at 40k per page is approximately 6 million pages.
Number of Documents in a Folder	This is a recommended limit only. Keep Folder size to 10,000 documents or less so that display does not take too much time to draw. If moving a folder between Cabinets make sure you have no more than 254 documents in the folder.
Number of Cabinets in a Library	Unlimited
Number of Drawers in a Cabinet	System architecture allows Drawers to be stored on multiple storage devices and is determined by the number of devices attached to a server.*

	*A server is defined as the computer that stores the DocuXplorer databases.
Number of Index Sets (User-defined Index Field Sets)	Unlimited
Number of User-Defined Fields in an Index Set	Maximum number fields - 35 *Breakdown of field types;* Date Fields – 5 Currency Fields – 5 Integer (number) Fields – 5 String (text character and number) Fields - 15 Memo Fields - 5
Number of User Defined User Defined OCR Templates	Unlimited
Number of User Defined Workflow definitions	Unlimited

Tip:

Document Limitations - The document size is not dependant on the number of pages you scan but rather what is on the pages. For example, an average page with just words is a lot smaller than a page with pictures. The page with just words may be around 50,000 characters and a page with a picture could be well over 1,000,000 characters. We suggest that you scan all text documents in Black and White not Color or Grayscale. Scanning in Color or Grayscale might increase the document size by 10 to 100 times the size of the same document in Black and White. Also break documents in smaller increments (sections) to keep file size down and to help with finding the required specific section of a document.

Switching between products

This Help topic refers to the following editions:
☑Professional ☑ Personal

From DocuXplorer Desktop menu item Help/Product Registration:

During the trial period users may wish to switch between products to see which will be the best fit for their situation.

To switch between products:

- From the File menu select Close the Library
- From the Help/Product Selection menu choose a Product Type
- From the File menu select Open Library

During the evaluation period access via the Internet will not function.

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Tutorial

Getting Started

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Welcome to your free trial of DocuXplorer.

This guide will review the necessary first steps so you can begin adding and organizing your documents quickly and effectively.

SETTING UP YOUR INITIAL TAXONOMY AND CUSTOMIZING YOUR LIBRARY TREE

We compiled some recommended taxonomies for you to choose from that will help with overall organization. To import one of our sample taxonomies, simply launch the Taxonomy Wizard by right-clicking on your Library and choosing "Import Taxonomy." The Wizard will guide you through the process of setting up your Library tree.

Watch our video about customizing your Library tree for your specific needs.

CUSTOMIZING INDEX SETS

When you're in a folder, you'll see Index Sets at the top. The different fields in the Index Set represent the metadata you will assign to each document, such as "document type" or "status." If you don't see an Index Set field you need, it can be added easily! Simply right-click on any Index Set field and choose "Add Fields." A new window will open with all of the different fields you can choose from. Then, drag-and-drop the field you need in the row of Index Set fields.

Watch our video on customizing Index Sets.

ADDING DOCUMENTS

To easily add your first document, we encourage you to follow the above steps to ensure that your Library Tree structure and Index Sets are customized and in place. Remember, in order to add a document, you must be in a folder level. Then, you simply click on the "Add Document" tab in the upper right hand of DocuXplorer, or right-click while in the actual folder. Here you can sync with your scanner or add an existing electronic document. When you select the document, a preview will appear, allowing you to see the information you need to populate

the index set fields next to the preview. When complete, click "Save and Close" and you've successfully added your first document into DocuXplorer!

Watch our video **on adding documents.**

In addition, we have three separate Getting Started Guides for our new integration with Zorrosign (an industry-leading e-signature firm), our Automated Workflow Designer, our Import Engine and our Smart Capture tool. These guides can be found in the Work Folder under the Library Tree.

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Registration

Registration

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer provides for a trial period. At any time during the trial period you may purchase the software. At the end of the trial period the program will stop functioning and ask for an Activation ID. You can regain access to the program and any documents you have stored in the Library by entering a valid Activation ID in the Registration Screen available from the Desktop Menu item Help | Product Registration.

To purchase an Activation ID please use our Online Store at or contact DocuXplorer directly at (212) 496-9871.

Activation - How it works:
DocuXplorer's On-line activation process is Firewall friendly and only requires traditional web access like viewing web pages via your browser.

With DocuXplorer Enterprise the activation process is only required to be performed on one computer. All other computer will be validated once connected to the Library.

With DocuXplorer Small Business, Professional or Personal the activation process is tied to the computer that performs the activation process. Deactivating this software will allow you to install and activate DocuXplorer on another computer.

To Activate your product;
- From the DocuXplorer Desktop select Help | Product Registration
- Enter the your Activation ID and press the Activate button

Deactivating the software will allow you to install and Activate DocuXplorer on another computer. The deactivate button will be disabled if you are not connected to a Library.

To Deactivate your product;
- From the DocuXplorer Desktop select Help | Product Registration
- Press the Deactivate button

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Show/Hide the registration details   **Hide**

Deactivating this software will allow you to install and activate DocuXplorer on another computer.   **Deactivate**

Activate will register or update your product licenses.   **Activate**

???   **Close**

Export

Import

Expiration Date:	12/31/2100 ▾
Subscription Date:	12/31/2021 ▾
Synchronize Date:	3/24/2020 2:11:45 PM ▾
Purchase Date:	1/24/2020 ▾
Account No:	738
System ID:	DOCUXPLORER
Owner/Company:	World Wide Products
Product Type:	Enterprise ▾
Product Modules:	☑ QuickBooks ☑ Import Engine ☑ Smart Capture ☑ Workflow ☑ Event Logging ☑ Security System
Storeage Limit:	Unlimited
Desktop User Count:	54
Read Only Web Users:	15
Read Write Web Users:	20

Manual Registration;

DocuXplorer can be manually registered via the Show | Export buttons. Once you have exported your current registration information email it to

support@docuxplorer.com for processing. Do not try to edit this file as it will become damaged and not be able to be processed. Once the registration information has

been processed and e-mailed back to you it can be import via Help | Product Registration | Show | Import. Once the licenses file has been imported select "Close" to

access your Library.

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Install and Update

Enterprise Installation - Network Install

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

To install the server and create the network Library use the link provided after purchase to download the DocuXplorer Enterprise Installation file.

DocuXplorer Installation requires that the installer log in as Administrator. Make sure you have installed the latest updates and service packs for your operating system and Office programs to your workstations and servers.

For Terminal Services, the install must be performed via the Add Remove programs dialog by selecting "Add New Programs" and follow Microsoft's directions. For Terminal Services DocuXplorer cannot be installed by check double clicking on the install icon.

Clients installing on a peer to peer network should click here to see important information

Run the install file on the network server that will house the DocuXplorer data and follow the instructions in the installation program.
The install program will create a default install folder C:\DXDOCS\DXInstall off the root of your network server. You may change the location to a different drive on the server or a subfolder on any drive on the server. It is **HIGHLY RECOMMENDED** that you accept the names and structures for the \DXDOCS folder provided during normal installation.
Make sure you have full access to the \DXDOCS folder through a Network Share with full permissions for all users. If a Network Share does not already exist create one for it. When creating the network Share, click the Permissions button and give Everyone Full Control then click Apply. Next, click the Security button and make sure the Administrator and System accounts have full control rights.

The install in the \DXDOCS folder will be used to install both server software on the server and the client software at each workstation.
When installing the Sybase Advantage Database to a server make sure you are installing the same version you have a serial number and validation code for. The Enterprise install has been updated to include different versions of Advantage Database Server to support older and newer client installations. When prompted for product selection, select Personalize. By default all options are selected for install. You will need to deselect those options that do not apply to your

installation. For example: if you are not installing the DocuXplorer Client on the server, delete all items except for the Advantage Database Server type you have a license for.

DX Configuration Utility

After installing the Sybase Advantage Database Software use the DX Configuration Utility to set the number of users and the number of Cabinets a user would normally have opened on their desktop. This will allow DocuXplorer to conserve computer resources while providing you with trouble-free DocuXplorer environment.

To configure DocuXplorer resources properly:

- Click the orange Server Configuration Utility button at the upper right of the last screen in the install process.
- Enter the number of users to the Number Purchased Field
- Enter the number of Cabinets a user would normally have opened in the Library.
- Click the Apply button.
- Wait for the progress window to disappear before proceeding.

The configuration process will take a few minutes so please be patient and wait for the progress bar to complete. When configuration has completed close the Utility and move on to install your Workstations.

[Firewalls](#)

The Microsoft Firewall can prevent DocuXplorer from communicating with the server software or workstations. The DocuXplorer database file ADS.EXE on the server should be added to the exemptions list of the Microsoft Firewall.

To exempt DocuXplorer from the Microsoft Firewall:

- Open the Control Panel
- In Classic View select Windows Firewall. In Category View select Security Center then at the bottom of the screen Mange security settings for: Windows Firewall
- In the Windows Firewall Dialog Box select the Exemptions tab
- Click the Add Program item and select DocuXplorer from the list

The ADS.exe program is located on the server at: C:\Program Files\Extended Systems\Advantage\Server\ADS.exe
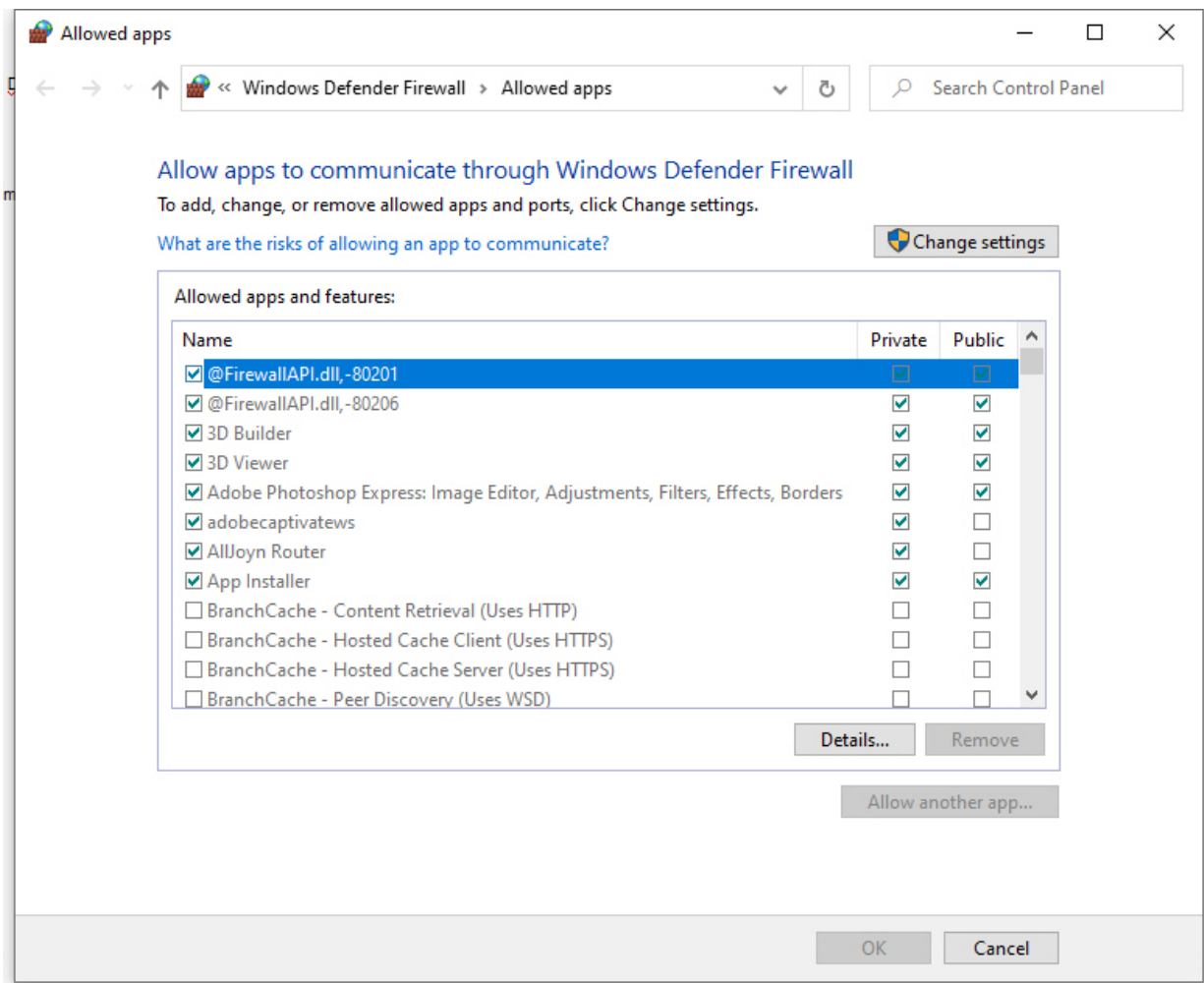
Hard Drive Indexing Software

Indexing software such as Google Desktop, Yahoo Desktop, or MSN Desktop and others present an issue in that they can slow down database programs by attempting to access the database files to index and reindex them without end. To keep DocuXplorer running at top speed exclude DocuXplorer database files from these programs. Exempt all files in \DXDOCS\DXLIBRARY\ folder or exempt the entire \DXDOCS folder and all its subfolders.

Workstation Installation

For each workstation installation, first map a drive to the \\ServerName\DXDocs folder on the server.

We recommend a logon script for this mapping if you have a number of people that will be accessing the system. Ask your IT administrator to create this script for you.

To install DocuXplorer to a workstation computer:

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- Make sure you have installed the latest updates and service packs for your operating system and Office programs on your computer
- Make sure you have administrator rights before you run the install
- Make sure all other software is closed. This is most important with Microsoft Office products as DocuXplorer installs elements to integrate with MS Office.
- Run the DocuXplorer Install: Right click the file ?:\DXDocs\DXInstall\DocuXplorerClient.exe and select Run as Administrator.
- When asked select the Setup Type and click <Next>
  - Complete Setup - all features will be installed, including the QuickBooks SDK and Library Templates called Quick-Starts - Index Sets and Cabinets
  - Minimum Setup - The minimum required set of features will be installed to conserve disk space
  - Personalized Setup - Complete control over which features are installed - recommended for advanced users
- We recommend that select the defaults selection for all other options during the installation process.

Tip:
After installing DocuXplorer, modifications can be made from the Control Panel, Add or Remove Programs. click DocuXplorer and select <Change>.
Workstation installations can also be run in silent mode ex.(DXDocs\DXInstall\DocuXplorerClient.exe /s). No user interface is shown during execution.

If you have a local Firewall enabled you will need to exempt the DocuXplorer.exe. See the instructions above to exempt the file from Microsoft Firewall.

The next step is to setup your DocuXplorer Library.

If you want to retain a Library previously created or during your trial period, copy and paste it to the ..\DXDOCS folder on your server. We highly recommend that you name the Library using the default DXLibrary.

After installing on your first workstation start the DocuXplorer program from the DocuXplorer icon that was placed on your desktop.
At the prompt, select the option;
<Create new Library>
If Library Create/ Connect window doesn't open:
- Click <File> <Open Library> and select <Library Create/Connect>
- Click the <Modify Settings> tab at the top of the window.
- Change the <Connection Path> to point to the DXLibrary using UNC coding, i.e.\\server name\DXDocs\DXLibrary or \\server name\folder name\DXDocs\DXLibrary

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At each successive workstation, connect to the Library created at the first workstation. Select;
<Connect to Library>

Application and workstation default options setup will depend on your use of DocuXplorer and the need for these DocuXplorer features. Use the program help to learn more about DocuXplorer Options. You can always change or add application and workstation defaults at any time.

Common Application Defaults
With your new Library open, set your application defaults from the <Tools><Options> Menu item. At the first workstation set your Library defaults. Set Workstation defaults at each workstation.

Library Defaults include,

Home | Options | Workstation - at the first workstation only - HIGHLY RECOMMENDED
Check for program updates at startup - provides automatic notification of release of program updates. The option should be set at only one workstation, all other workstations will automatically be updated after starting the automatic download and installation of the update file.

Home | Options | Administrative
Log Document Events - select this to create an audit trail on the documents in the Library

Home | Options | Library
Login Required - select this to require User Login. This item is required if you wish to have the Document Event Log track the operator performing an action on a document.

Home | Options | Manage Users/Groups
Groups - right-click to select Import Users and Groups from a network resource.
Users - select this to retrieve the User List from your Network Active Directory, then enter passwords and administrative status. Make sure at least one user has Administrator status.

Workstation Defaults include,
In Tools | Options | Library
User Access - Enter workstation user name, if desired, allow network access to override Login password requirement. Set a time for Inactivity Logoff if needed.
In Tools | Options | Document Defaults
Set the maximum number of versions to store, if needed.

If you wish, you can purchase Installation Support via telephone and Internet connection to provide hands on support directly from DocuXplorer Software. Contact tech support at support@DocuXplorer.com for pricing and to set up an installation appointment

Note:
Exclude all DocuXplorer database files from your Anti-Virus Software auto-protect process. Exclusions specify the files that should not be scanned by file name extension or by specific file name. File extensions to exclude are .ADT, .ADM, .ADD, .AI, .AM .TMP and .ADI.

See related topics for information on setting server connections

Configuration of Database Resources

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

To properly run DocuXplorer you will need to set a default number of connections to the server database based on the number of users and Cabinets in your Library.

You can find the Configuration Utility in the DXEInstall folder created on your network server -?:\..\DXInstall\ADS\DXADSConfiguration.exe.

Note: This utility should only be run from the server and all DocuXplorer users must have the DocuXplorer client software on their workstations closed.

DocuXplorer uses the award-winning Sybase Advantage Database as its DX Server software. As always, our focus at DocuXplorer is taking complicated technical functions and making them accessible to the average computer user. Setting up a database server is often a highly technical operation requiring trained database administrators or IT Consultants. We have simplified the task of installing the database software to your network server by providing you with our exclusive DX Server Configuration Utility. The DX Server Configuration Utility is designed to automatically configure the Sybase Advantage Database for use with DocuXplorer. It will provide you with all the information and access required to fine tune the database for optimal performance.

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DocuXplorer Configuration Calculator	✕

⚡ Apply ✖ Close | ❓ Help

User Settings

Number of licenses users	1 ⯅⯆
Max number of open Cabinets for a	5

Server

Number of Data Locks	900
NumberofConnections	10
Number of Work Areas	715
Number of Tables	119
Number of Indexes	119
Allow IP Connections	☐
Permitted Replication Errors	7137,7057

Server Settings

Server name	DESKTOP-7OID3KD
Service name	Advantage

If another application is accessing the Advantage Database Server, make sure that the configuration setting suggested by this utility does not lower the settings suggested by the other application.

Server Status: RUNNING

To set the Server Configuration enter the appropriate data into the User Settings fields.

User Settings:

Number of licensed users

Maximum of number of open Cabinets for a user - the maximum number of open Cabinets refers to the number of DocuXplorer Cabinets that you expect a user to have open on their desktop at the same time.

Server Configuration - these items are view only. Entries are determined by the User Settings entered:

*Number of Connections - This is the maximum number of connections that can be active on the Advantage Database Server at one time. Connections are defined as follows:

- For Advantage DOS-based applications, a "connection" is defined as a single application connected to the Advantage Database Server.
- For Advantage 16-bit Windows applications, a "connection" is defined as a single application connected to the Advantage Database Server.

Additional "connections" to the Advantage Database Server via calls to the Advantage "connect" API can be obtained.

- For Advantage 32-bit Windows applications, a "connection" is defined as a single application connected to the Advantage Database Server. Additional "connections" to the Advantage Database Server can be obtained via calls to the Advantage "connect" API, using an Advantage connection component, or using an Advantage connection object

For example, to minimize memory usage, if you are licensed for 100 users, but have only 75 connections, you can save a small amount of memory by configuring the number of connections to 75. Or, if you are licensed for 20 users but have 3 Advantage applications running on each workstation, the number of connections should be set to at least 60.

*Number of Work Areas - the maximum number of work areas that can be in use at one time. This number is the total sum of all work areas being used by all clients. Each client connection is limited to a maximum of 250 work areas. A work area is a logical "container" that consists of a single open table, an optional memo file, and up to 15 index files. The Number of Work Areas configuration setting on the Advantage Database Server is a per-client setting. That is, one work area must be available for each table opened by every client. For example, if five Advantage clients have opened 10 tables, there must be at least 50 work areas configured on the Advantage Database Server. It does not matter if those 10 tables are the same tables, or if they are completely different tables.

*Number of Tables - This is the maximum number of distinct tables that can be open at one time. This number cannot be larger than the number of configured work areas. However, due to the sharing of file handles, this number can be less than the number of work areas.

The "Number of Tables" configuration setting on the Advantage Database Server is a per-server setting. That is, one table setting must be available per table opened, no matter how many clients have that table open. For example, if 5 Advantage clients have opened the same 10 tables, there must be at least 10 tables configured on the Advantage Database Server. Thus, the "Number of Tables" configuration setting differs from the "Number of Work Areas" setting: in that, the "tables" setting is the number of tables opened "per server" and the "work areas" setting is the number of tables opened "per client".

If an Advantage application attempts to open a table on the Advantage Database Server that has not yet been opened by any Advantage application, and the configured number of tables has already been opened, the Advantage application that is attempting to open that table will receive a 7005 error, Maximum number of tables exceeded, until a table "element" becomes available. For example, if the Advantage Database Server is configured for a maximum of 50 concurrently open tables, 50 distinct tables are already

currently open with the Advantage Database Server, and a new or existing Advantage application attempts to open a table that has not yet been opened by the Advantage Database Server, that table open request will fail with a 7005 error.

*Number of Indexes - This parameter directly relates to the maximum number of distinct index files that can be open at any one time. As with Number of Tables, you can save memory by setting this default to match the actual number of open index files.

The "Number of Index Files" configuration setting on the Advantage Database Server is a per-server setting. That is, one index file must be available per index file opened, no matter how many clients have that index file open. For example, if 128 Advantage clients have opened the same 14 index files, there must be at least 14 index files configured on the Advantage Database Server. Thus, the "Number of Index Files" configuration setting is similar to the "Number of Tables" setting: in that, both settings are the number of files opened "per server" and not the number of files opened "per client".

If an Advantage application attempts to open an index file on the Advantage Database Server that has not yet been opened by any Advantage application, and the configured number of index files have already been opened, the Advantage application that is attempting to open that index file will receive a 7006 error, Maximum number of index files exceeded, until an index file "element" becomes available. For example, if the Advantage Database Server is configured for a maximum of 50 concurrently open index files, 50 distinct index files are already currently open with the Advantage Database Server, and a new or existing Advantage application attempts to open an index file that has not yet been opened by the Advantage Database Server, that index file open request will fail with a 7006 error.

*Number of Data Locks - this is the maximum number of record locks, table locks, implicit header locks, and implicit index locks that can be in effect at one time. It may not be necessary to change this parameter. For a frame of reference, check the Advantage Management Utility for the Max Used number. Increase this parameter only if Data Locks have been rejected.

The "Number of Data Locks" configuration setting on the Advantage Database Server is a "per-client" setting. That is, one data lock must be available per record, table, header, or index lock requested per Advantage client. For example, if 10 Advantage clients each have 15 records or files locked at one time, there must be at least 150 data locks configured on the Advantage Database Server.

If an Advantage application attempts to obtain a record, table, or index lock, and the configured number of data locks have already been used, the Advantage application which is attempting to get the lock will receive a 7007 error, Maximum number of locks exceeded, until a lock "element" becomes

available. For example, if the Advantage Database Server is configured for a maximum of 5000 concurrent data locks, 5000 data locks are already in use by the Advantage Database Server, and a new or existing Advantage application attempts to lock a record, table, or index, that lock request will fail with a 7007 error. Data locks take very little memory. Setting this value to a very high number should not require much server RAM to be used.

*References: Sybase Advantage Program Help

Server

Server Name - the name of the server running the DX Server software

Service Name - the name of the service running in the operating system

Tip:

If you already have programs running the Sybase Advantage Database make sure that the configuration suggested by the Configuration Utility does not lower the numbers allowed below your original settings.

You can see more information about server configuration in the Sybase Advantage Database help program.

Auto-Update

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer's Auto-Update feature available from the Home/Options/Administrative menu item can automatically check for DocuXplorer maintenance updates at program startup when an Internet connection is available.
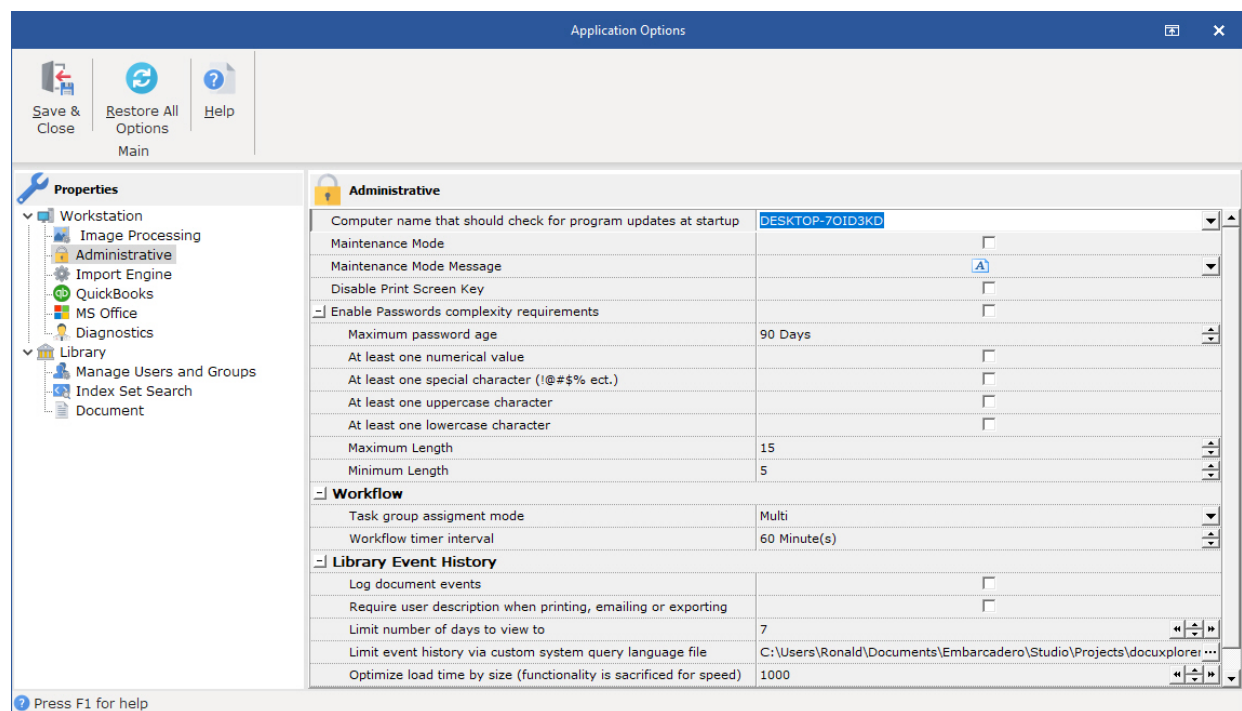
When a new maintenance update is released, the program will detect its availability and direct you to the DocuXplorer web site where you can read about new feature and fixes and instructions to download and install the program.

To enable the Automatic Update feature select a computer name from the "Enter computer name that should check for program updates" item in the Tools | Options | Administrative menu item of the DocuXplorer Desktop. If you do not want to check for program updates at startup then leave this item blank.

 For Personal or Professional select the computer from the drop down list at your computer.

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For Enterprise systems go to the administrator workstation that will manage all other workstations and select the workstation name to check for updates. This setting is global and needs to be set only at one workstation for the entire Enterprise system.

To use the Manual Update function of DocuXplorer leave the item blank. A user will then have to select the Product Update item from the Menu Bar Help drop-down menu to check for program updates. Administrative right is required to select this option.

When an Auto-Update is available use the following steps to update your DocuXplorer software;

- Have all users exit DocuXplorer and shut down or log off their computers.
- From a workstation that has Administrative access to the server, start DocuXplorer
- Select Help | Product Updates
- Follow the on screen instructions, when prompted to verify the location where DocuXplorer is stored. Make sure the path is correct. If the path starts with a backslash make sure there are two e.g. \\Server Name\DXDocs\...
- Once the path is verified you will be prompted to overwrite your current files, select <Yes to all> as your response.
- Once the update has completed restart DocuXplorer.
- Select Help | About to verify the new build number.

Tip:

It is recommended that you map a drive letter to your \\server name\DXDocs share and add a DocuXplorer short cut to your desktop using the driver letter instead of the UNC formed path. This will help you select the path to where DocuXplorer is stored with minimal effort.

Data Conversion from DocuXplorer 3.x to 4.x

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

These instructions are provided for products 2013 or older.
Data conversion for DocuXplorer is required when the database format changes to support new feature. The first and second numbers of product build number located on the Help | About dialog represent what version of the database structure your system is currently using.

The Conversion Process will convert all your DX 3 data to the current format. The process will convert your DX3 user list and passwords to the current format. Any users that had been disabled in DX 3 will display as enabled. You will need to re-disable those users in the current version.

Data that has been moved off-line to CD or DVD will also need to be converted. Copy the data from the off-line storage media back to your DX3Library folder. Make sure you change the Cabinet and Drawer file attributes back to read/write after copying them back from read-only media. In DocuXplorer click each Cabinet and Drawer to provide connection information to the new location of the data. Make sure you can open and view the document in the newly restored Cabinets.

You will also need to have an area of free space on the conversion drive at 3 times the size of your largest file. Normally the largest files in the DocuXplorer Library are the Drawer files. If your largest Drawer is 100 MB you will need at least 300 MB of free space to complete the conversion.

The time to complete the conversion process will depend on the amount of data to be converted. For a Library with a lot of data, the conversion process can take quite a long time, so please be patient and do not stop the conversion process while it is in progress, it will corrupt your data requiring a restore from your backed up DX 3 data.
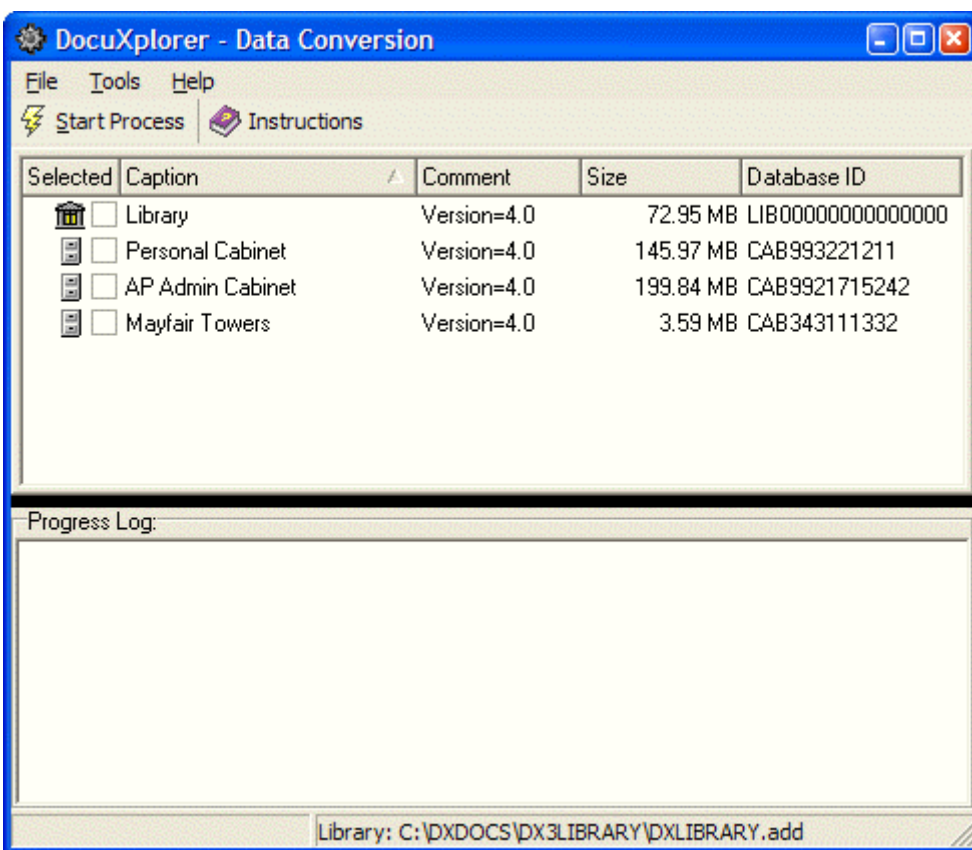
To convert data from DocuXplorer 3:

1. Make a complete Backup of your DocuXplorer data files. The data files are usually stored in the DX3Library folder and sub-folders. The conversion process will overwrite your DX 3 data files, if the data conversion process fails for any reason and a good backup is not available you will not be able to recover your original DX3 data.

2. Start DX4 and select "Connect to Library"

3. Click on Modify Settings

4. Set your Connection Path to the DX Library folder.

5. Change the Library Name to "DX3Library"

6. Click Finish on the upper left of the screen to bring up the DX conversion Screen

7. Convert each item (Cabinet), one item at a time starting with the Library item

8. After the completion of all conversion processes close the conversion utility and select <File><Open Library> from the DocuXplorer Desktop. If the Library does not automatically open then connect to the Library .

9. If "Login Required" was enabled, login with the user name "Administrator" and the default password "admin"

10. After the Library opens read the program help item "Security/Security Overview" and "The Options Menu/Manage Users/Groups" and set security

Tip:

- Some Index Sets displays will need to be reset for groupings, sort order and summary footers.
- After the conversion is complete it is recommended that you rename the DX3Library to DXLibrary folder in Windows Explorer and reconnect to the Library with the new location name.

The DocuXplorer Desktop

DocuXplorer Desktop

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The DocuXplorer Desktop is your main interface with DocuXplorer functions.
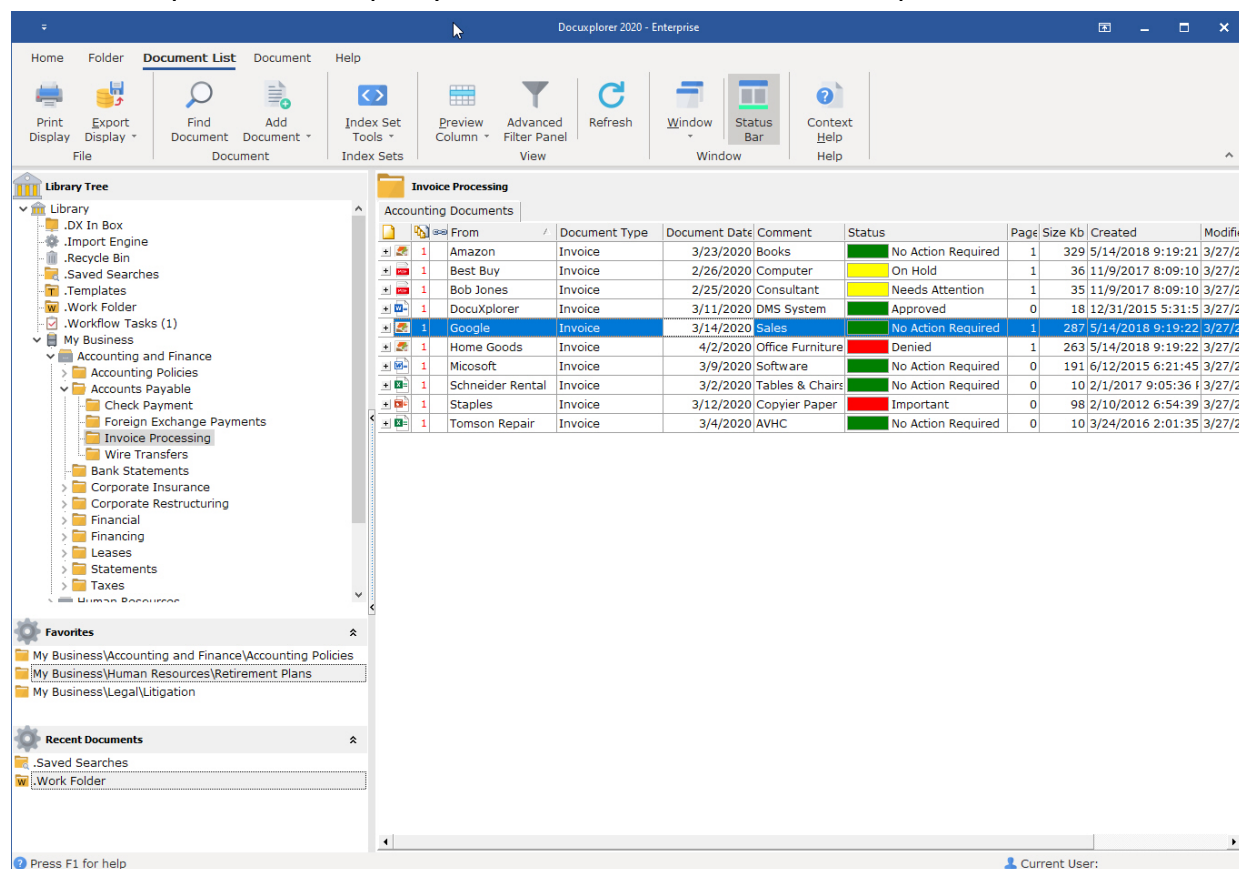
The Desktop contains:
Ribbon – The ribbon menu provides access to the features and functions of DocuXplorer. Menu will reflect the functionality available on the object in focus and will change as new objects are selected. See the Ribbon help topic for details.

Library Tree Window – The Library Tree Window appearing on the left side displays a graphic hierarchical tree of the Library. The tree branches consist of icons for the DX Inbox, Recycle Bin, Work Folder, Saved Search Folder, Cabinets, Drawers, Folders, and Subfolders. Use the mouse to double-click on a Cabinet,

Drawer, Folder or Subfolder to expand the tree below each level or click the [+] to expand the object to display its child objects.

Tip:
- Increase your productivity by using the right mouse button. Highlight a Cabinet, Drawer, or Folder and use the right mouse button to display a menu of commands that apply to that item.
- Quickly open all objects in a highlighted item of the Library Tree by clicking the asterisk * on the keyboard.

Folder Contents Window – click a folder in the Library Window and the Folder Contents Window on the right will display a list view of the documents contained in that folder. From the Folder Contents Window a user can edit index information, copy, paste and delete documents, email documents, print reports, export documents, add fields, change document and field properties, add and change document security and more.

Status Bar – The status bar at the bottom of the DocuXplorer desktop displays the number of documents contained in the open folder. When multiple documents have been selected, the count will display in the status bar.

Tip:
Use the right mouse button to display a menu of commands that apply when working with the highlighted DocuXplorer object.

Ribbon Menu

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑Small Business

Use the ribbon menu to access the basic features and functions of DocuXplorer. The ribbon menu will display all available functions based on the DocuXplorer object in focus. Functions for an object that are unavailable due to security restrictions or other reasons are grayed out. Objects can be items on the Library Tree such as Library, Recycle Bin,Import Engine, DX Inbox, Saved Search, Templates, Work Folder, Workflow, Cabinets, Drawers and Folders, or Documents in a Document List View. Many menu items have keyboard short cuts. Click here to see a list of available Keyboard Shortcuts.

The Home and Help menu tabs are always available not matter what object in the Library tree is selected. The reset of the menu bar selections are describe under Working With the Library with the title of the Library tree object name. Folders, Document and Document List view menu are located in the help under Working with Folders, Working with Document and Working with Document List views.
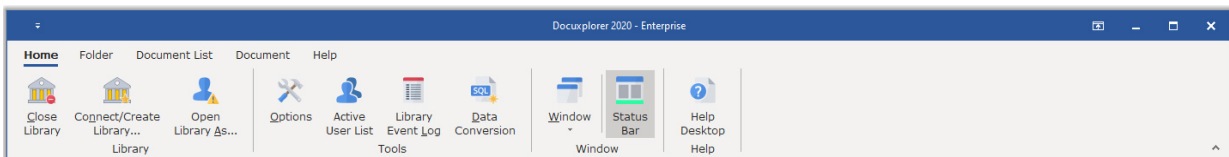
- Close Library – Closes the Library but leaves the DocuXplorer desktop open. When the Library is closed, the File menu option will be renamed as Open Library.
- Create/Connect Library… - allows users to connect to a DocuXplorer Library.
- **Note**: DocuXplorer supports only a single Library at each installation. Once you have created your Library do not create any other new Library.
- Open Library As... - allows users to log out of the Library and log back in as a different user.
- Options - set application defaults for global or local user options.
- Active User List - a list of users logged into DocuXplorer.
- Library Event Log - available in Professional and Enterprise only.
- Data Conversion - a tool to convert data from one DX version to another when the structure of the database changes.
- Window - Provides a list of documents that are currently open.
- Status Bar – Show various types of status information at the bottom of the DocuXplorer window.
- Help = Provides access to the help describing the DX Desktop.

Help
All items are displayed regardless of what Library Tree items is selected
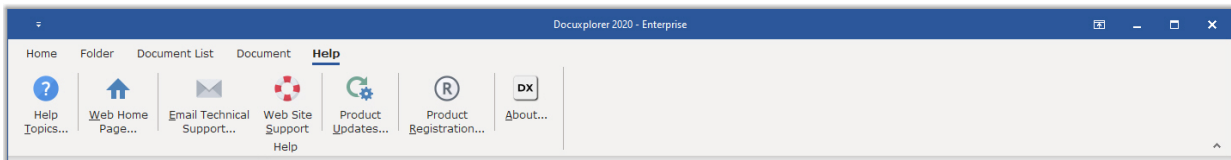
- Help Topics - opens the DocuXplorer documentation.
- Web Home Page - DocuXplorer Web site Home Page.
- Email Technical Support - to create an email form that you can use to ask questions and report issues to DocuXplorer tech support.
- Web Site Support - Links to the top-level support page on the DocuXplorer Web site.
- Product Updates - checks the DocuXplorer web site for updates are available.
- Product Registration Screen - allows user to display or input DocuXplorer Registration information.
- About... - DocuXplorer information screen display DocuXplorer edition, version number and licensing information.

Folder

 Items display on the Folder Menu when focus is on; Library, DX Inbox, Cabinet and Drawer
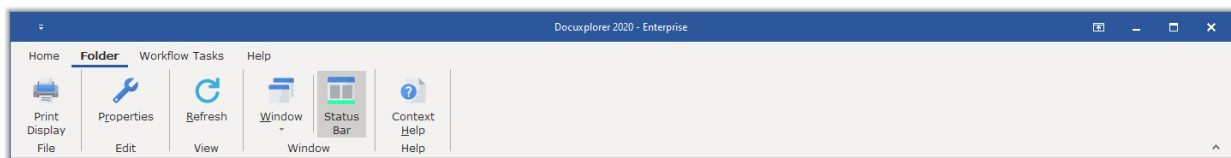
- Print Display - Print the Library tree view.
- Properties - display the properties of the selected folder.
- Refresh F5 – Refresh the Library Tree after an operation to ensure the results of the operation are repainted onto the window.
- Window - Displays a list of open documents.
- Status Bar – Show various types of status information at the bottom of the DocuXplorer window.
- Context Help - shows the help information for context of the select area of the screen.

Folder

 Items display on the Folder Menu when focus is on; Recycle Bin, Template,Saved Searches, Work Folder, Document Folder
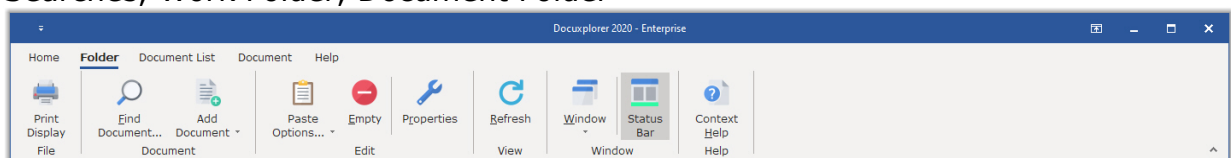
- Print Display - Print the Library tree view
- Find Document – opens the Find Document Dialog to search for documents.
- Add Document – Submenu appears but is grayed out as documents cannot be added to these DocuXplorer objects. Documents may only be added to Folders.

- Paste Options -
  - Paste - Places the copied or cut items original selected items to the select folder
  - Paste Folder Structure - allows a user to paste a [Folder Structure](#) to a Drawer. This item is grayed out until a Drawer's Folder Structure has been selected to be copied.
  - Paste Document Short Cut - allows a user to paste a [Document Shortcut](#) to a Folder. This item is grayed out until a Document has been selected to be Cut or Copied.
  - Paste Documents from Explorer - allows a user to paste a Document to a Folder from Windows Explorer. This item is grayed out until a Document has been selected to Cut or Copied in Windows Explorer.
- Empty - deletes the contents of the Recycle Bin, Saved Search, Work Folder, document folder
- [Properties](#) - display the properties of the Recycle Bin, Saved Search, Work Folder or Document Folder
- Refresh F5 – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.
- Window - Displays a list of open documents
- [Status Bar](#) – Show various types of status information at the bottom of the DocuXplorer window.
- Context Help - shows the help information for context of the select area of the screen

Document List

- [Print Display](#) – Will print the display of the current Import Engine List View. Items will be grayed out until an item or multiple items have been selected.
- [Export Display](#) – Will allow the display of the current Import Engine List View to be exported to a hard drive location. Display can be exported to Excel, HTML, XML, or Comma Separated Values Text file.
- [Find Document](#) – opens the Find Document Dialog to search for documents.
- [Add Document](#) – Submenu appears but is grayed out as documents cannot be added to these DocuXplorer objects. Documents may only be added to Folders.
- Refresh F5 – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.
- Window - Displays a list of open documents
- [Status Bar](#) – Show various types of status information at the bottom of the DocuXplorer window.
- Context Help - shows the help information for context of the select area of the screen

Document

- Cut - allows the user to cut the Folder from the present location
- Copy - allows user to copy the Folder to be pasted to a new location
- Paste - Allows a user to paste a Folder to a Drawer or to Folder as a Sub-Folder. This item is grayed out until a Folder has been selected to Cut or Copy.
- Paste Document Shortcut - allows a user to paste a Document Shortcut to a Folder. This item is grayed out until a Document has been selected to Cut or Copy.
- Paste Documents from Explorer - allows a user to paste a Document to a Folder from Windows Explorer. This item is grayed out until a Document has been selected to Cut or Copy in Windows Explorer.
- Paste Folder Structure - allows a user to paste a Folder Structure to a Drawer. This item is grayed out until a Drawer's Folder Structure has been selected to Copy.
- Delete - deletes the Folder
- Properties - display the properties of the Library, DX Inbox, or Import Engine.
- Cut, Copy, Paste, Paste Document Shortcut, Paste Documents from Explorer, Paste Folder Structure, Delete, and Rename are grayed out. These functions are not available for these objects.

Cabinets
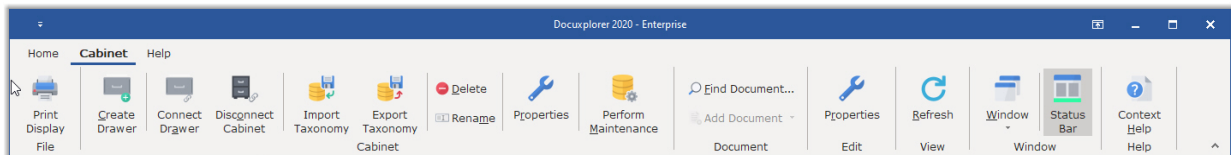
- Cut, Copy, Paste, Paste Document Shortcut, Paste Documents from Explorer and Paste Folder Structure are grayed out. These functions are not available with this object.
- Delete - deletes the Cabinet and all its Drawers, Folder and Documents
- Rename - renames the Cabinet
- Properties - display the properties of a Cabinet
- Refresh F5 – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.
- Window - Displays a list of open documents
- Status Bar – Show various types of status information at the bottom of the DocuXplorer window.
- Context Help - shows the help information for context of the select area of the screen

Drawers
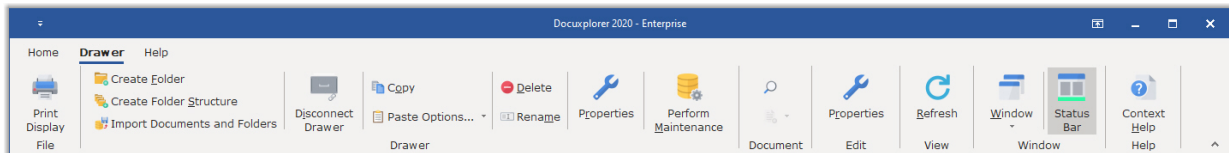
- Cut, Paste Document Shortcut, and Paste Documents from Explorer are not relevant to this item and are grayed out.
- Copy - allows user to copy the Folder Structure of a Drawer to the clipboard
- Paste Folder Structure - allows a user to paste a Folder Structure to a Drawer. This item is grayed out until a Drawer's Folder Structure has been selected to Copy.
- Delete - deletes the Drawer and all its Folders and Documents
- Rename - renames the Drawer
- Properties - display the properties of the Drawer

Folder
- Cut - allows the user to cut the Folder from the present location
- Copy - allows user to copy the Folder to be pasted to a new location
- Paste - Allows a user to paste a Folder to a Drawer or to Folder as a Sub-Folder. This item is grayed out until a Folder has been selected to Cut or Copy.
- Paste Document Shortcut - allows a user to paste a Document Shortcut to a Folder. This item is grayed out until a Document has been selected to Cut or Copy.
- Paste Documents from Explorer - allows a user to paste a Document to a Folder from Windows Explorer. This item is grayed out until a Document has been selected to Cut or Copy in Windows Explorer.
- Paste Folder Structure - allows a user to paste a Folder Structure to a Drawer. This item is grayed out until a Drawer's Folder Structure has been selected to Copy.
- Delete - deletes the Folder
- Rename - renames the Folder
- Properties - display the properties of the Folder

Document List View or the Find Dialog Query Results List while highlighting one or more documents
- Cut - allows user to cut Documents from the present location
- Copy - allows user to copy the Document to be pasted to a new location
- Paste - allows user to paste cut or copied documents into a folder. This menu item will be grayed out when no documents has been selected to Cut or Copy.
- Select All - allows user to select all documents in the List View or Query Results List
- Delete - deletes the documents selected
- Edit Data - allows user to start or stop Edit Mode to edit the index data in the index field in focus
- Rename - renames the document
- Properties - display the properties of the document

Document List View while in Edit Mode - when in Edit Mode the focus is on the specific index data entered in that index field.

- Undo - allows a user to undo a change that has been made to index data in an index field in focus. This item is grayed out unless an action such as Paste has been performed.
- Cut - allows user to cut from the present location. This item is grayed out until a text string has been selected.
- Copy - allows user to copy the Folder to be pasted to a new location. This item is grayed out until a text string has been selected.
- Paste - allows user to paste cut or copied data into an index field. This item is grayed out Unless a text string has been selected in Cut or Copy.
- Select All - allows user to select all data in an index field
- Delete - deletes the content of the index field
- Edit Data - allows user to start or stop Edit Mode to edit the index data in the index field in focus
- Properties - display the properties of the Index Field
- Edit commands are also available from the Icon Toolbar or the right mouse button menu.

View
View commands allow users to customize and configure the DocuXplorer Desktop. Select or unselect any part of the DocuXplorer Desktop to tailor the Desktop View to your needs.

Items Displayed on View Menu when focus is on the;

All objects other than documents in a Folder or Query List
- Status Bar – Show various types of status information at the bottom of the DocuXplorer window.
- Refresh F5 – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.
- Preview Column - Select a memo field to display in the Document List View and Document Window from the drop down list. The default field for the Preview Column is the Description Field. Any selected memo field will also display in a tab in the Document Window. If you have selected the "Not Selected" item from the drop down list the memo field tab will not display in a Document Window.

Tip:
A user can select another Memo Field to be the Preview Column. If another Memo Field is selected for the Preview Column it can not be added to the Column Header Bar. The field selected for the Preview Column will not display in the Add Fields dialog box.
The Preview Column can only be edited in a Document Window.

- Preview Column (Show/Hide) - Allows users to preview entries in the selected Preview Column Field. An additional line will be added to each document in the folder displaying the first 2 lines of the selected memo field.

- Advanced Filter Panel – Filtering is the process of retrieving a subset of documents in a folder based on filtering criteria. The Advanced Filter Panel allows users to filter the display of a folder. The folder display can be filtered on existing data in the folders index fields, customized, or set to display all documents associated to the specific data being filtered for.
- Show/Hide Column Filter Option – Will place the Filter Panel above the Index Set header in the Document List View.
- Refresh F5 – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.

Icon Toolbar

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The **Icon Toolbar** gives you access to basic features and functions of DocuXplorer. There are four groups available, Main, Edit, Tools, and Folder.

Main

Default icons to quickly access the functions [Add Document](#), [Create Folder](#), [Find Documents](#)..

Index Set View

Displays the Index Set selected for the [Document List View](#). User may also change the Index Set used in the Document List View display from the drop-down list. Selecting an Index Set from the drop-down list will cause the folder in focus to display only documents with that Index Set assigned to them.

Index Set Tools allows a user to create new Index Sets, manage Index Sets and save the display setting.

Edit

Default icons include cut, copy and paste, delete item and undo. Edit icons will be available only when the function is available for the item selected. If the function is not available the icon will be grayed out.

The Item Properties button will bring up the Properties dialog box for the DocuXplorer item highlighted.

Tip:

Icons on the toolbar have balloons that appear if the cursor hovers over the icon for one second. The balloon contains text explaining the function of that icon.

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The Options Menu

About Application Options

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Options, located in the DocuXplorer Desktop menu bar under Tools, are used to set application defaults.

Setting application defaults is an Administrator function and can only be changed by users with Administrator permissions.

Set program defaults upon installation.

Many defaults set in the Options dialogs are global but some default items are workstation specific, see the specific option help item for details on which defaults are global and which are workstation specific.

Global option defaults are stored in the " DocuXplorer.ini" file located in the folder containing the DocuXplorer executable file. Workstations requiring access to global application defaults must run DocuXplorer from the server.

Library Options are saved within the connected Library and are enforced regardless of where DocuXplorer is running.

Any changes in the default settings will not affect objects created prior to the change.

Applications defaults can be set for:
Workstation Defaults
Image Processing
Administrative
Import Engine
QuickBooks Defaults
MS Office Defaults
Diagnostic Logging Defaults
Library Defaults
Manage Users/Groups
Index Set Search Options
Document Content Search Options
Document Defaults

Workstation Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Workstation Defaults Window box can be reached from the Tools Menu in the Options item of the DocuXplorer desktop.

Options on this screen can be changed by the user, no administrative access is required.

All DocuXplorer Workstation default settings are written to the Windows Registry - defaults set in this window affect Cabinets, Drawers, Folders, and Documents added, copied, or moved at the workstation level. These default settings are specific to a workstation.

The defaults to set are:

Workstation Options

Display full path of document on title bar

The document viewer will display the full document path Cabinet/Drawer/Folder/Document on the Title Bar

Preserve desktop and document viewer positions

Saves window positions so that when a user opens that window again it will display in the same position last used.

Confirm when canceling modifications to a document

When this option is checked and the user tries to leave the Document Viewer without saving your their changes, a dialog box is shown confirming their action.

Confirm updates when copying or moving folders

When selected the Update Folders feature is enabled. A dialog box is displayed when a user moves or copies a folder into a Cabinet that already contains the same folder. The dialog box informs users of any changes to the folder's contents and asks the user to update the original folder or create a new folder.

Confirm updates when copying or moving documents

When selected the Update Documents feature is enabled. A dialog box is displayed when you move or copy a document into a Cabinet that already contains a previous version of the same document. The dialog box informs users of any changes to the document's index or image and asks the user to update the original document or create a new document.

Automatically save Index Set changes

Each user of the system can individually use this option by checking it, or turn it off by removing the check mark.

When this option is selected, changes will be saved to the Index Set properties automatically. For example, if you change one or more index set properties and move to a new folder, the settings and changes will be saved automatically as you leave. If the option is not checked and you move off the folder, the index set properties changed will revert back to what they were prior to any changes

Note:

To use this function a user must have security permission to modify Index Set properties.

Show application on icon tray at program startup

Enables DocuXplorer to display an icon on the Windows Desktop Icon Tray. right-click the DocuXplorer icon in the Icon Tray to display a menu of DocuXplorer functions available from the Icon Tray.

Return to the last selected folder on startup

When selected DocuXplorer will open to the folder lasted opened.

Menu selection to perform when double clicking on a document

This setting allows you to choose what happens when you double click a document.

The choices are:

Default - Image documents open in the Document Viewer and Associated Application documents open in their native program.

Open Attachment - Same as above (no longer applies, keep for backward compatibly)

Open Document Viewer - Images and associated application documents will open in the DocuXplorer Document Viewer.

SendTo Directory

The location of the default directory on the hard drive to save exported documents.

Automatically remember last selected location

When the Send To location is a folder (as opposed to an email address), that location becomes the default folder, and is also reflected in the SendTo Directory discussed above.

Interface look & feel

Allows users to select an interface from a drop-down list of standard, enhanced and theme interface options

Show field hints

Allows user to select an option to display field hints when rolling over a column header.

Language Settings

Interface Language

Select the language in which DocuXplorer will display all menus and directions.

Bi-directional functionality

This option provide support for how text is displayed to support different languages. below are the description of the four modes. This feature is set automatically base on the selected language but can be changed manually.

- **Left To Right:** Draws text using left to right reading order. The alignment and scroll bars are not changed. For instance, when entering right to left text, such as Arabic or Hebrew, the cursor goes

into push mode and the text is entered right to left. Latin text, such as English or French, is entered left to right. Left To Right is the default value.

- **Right To Left:** Draws text using right to left reading order, the alignment is changed and the scroll bar is moved. Text is entered as normal for right-to-left languages such as Arabic or Hebrew. When the keyboard is changed to a Latin language, the cursor goes into push mode and the text is entered left to right.
- **Right To Left No Align:** Draws text using right to left reading order, the alignment is not changed, and the scroll bar is moved.
- **Right To Left Reading Only:** Draws text using right to left reading order, and the alignment and scroll bars are not changed.

Import Document Settings

Automatically remember last select location

DocuXplorer will remember the last location you selected when importing new documents

Send original files of imported document to the Recycle Bin

When selected, DocuXplorer will send original files of documents imported from a local drive to the operating system Recycle Bin. Documents imported from a shared network drive cannot be sent to the operating system Recycle Bin and are deleted without the ability to be restored from the operating system.

Tip:

This feature provides you with a method of clearing imported files from your hard drive, preventing any confusion by assuring that all working documents are stored only in the DocuXplorer database.

Enable extended file properties for Auto Index values

DocuXplorer has the ability to read the operating system extended file properties and add this information to DocuXplorer Auto Index variables list. You can see what values a file supports by importing the document into DocuXplorer and while in the document viewer select File | Properties. Each file type has its own extended value and may not be support for other file types.

Once you have decided which value you would like to use during your import process simple use the value e.g. {Date Taken} in any index fields default properties values.

Show warning when document is larger than...

DocuXplorer will display a warning when attempting to import a document larger than the specified size. Documents scanned at a very high

resolution or with thousands of colors will have a very large file size and can fill up a hard disk quickly. this warning helps to guard against this. At the time of importing a document only an administrator can override the default limit defined here. The default value is 40MB with a maximum value of 3,500MB (3.5Gigs).

Index all imported documents

When this is option is checked all documents that are imported are required to be index by the user. When this options is unchecked all documents are imported directly in to the selected folder and indexing can be postponed. The default setting is unchecked.

Extract Text to support Full Text Searches

Enter file extensions for the installed iFilter service

DocuXplorer uses the iFilter technology to extract text from various file formats. Check the www.DocuXplorer.com/Support/iFilter-Resources for information on third party iFilter software. Enter in the file extension that are support by the software you installed. The format should be .<File Extension> e.g. .DOC, .XLS etc...

Microsoft provide detailed instruction on how to enabled iFilter technology for Windows 7.

http://technet.microsoft.com/en-us/library/dd755985(WS.10).aspx

To install Windows TIFF iFilter with Windows 7

1. Click Start, click Control Panel, click Programs, and then click Turn Windows features on or off.

2. Select the Windows TIFF iFilter check box.

3. Click OK.

Extract text when adding documents

To support Full Text Searches, DocuXplorer can automatically extract text from newly added documents using the Microsoft's iFilter technology, DocuXplorer PDF Print Driver or any Peernet Print Driver.

Update extract text after document modifications

After a document has been modified the text used for a full text search can be automatically updated when this options has been checked.

Document Conversion Process

This sets a global default that allows DocuXplorer to convert existing documents to PDF. This conversion process uses the [DocuXplorer PDF Print Driver](), while DocuXplorer defaults the Print Driver name to DocuXplorer - PDF. If a user changes the DocuXplorer Print Driver name this drop down list will allow those users to reset to the correct Print Driver to use for the conversion process. A user may also select from a multiple list of print drivers to be used to create new documents that default to DocuXplorer.

Note:

The conversion process supports either the DocuXplorer PDF Print Driver or the Peernet e-TIFF x.0 driver. The DocuXplorer PDF Print Driver is the default setting. The Peernet e-TIFF x.0 driver is 3rd party software not supplied with DocuXplorer and will convert documents to a TIFF image.

For a document to be printable using the DocuXplorer Print Driver, the native program must be installed on that computer and the program must support printing from Windows Explorer.

Print Driver to execute for conversion process - Select the print driver to execute during conversion process

Ask if annotations should be included - This enable you to hide this prompt each time a file conversion takes place.

Include annotation when converting tiff documents - This determined the default response if the above prompt is not shown.

Enable Job ID - automatically inserts a job ID to the beginning of the file produce by the print driver. If you need to add documents from within DocuXplorer via the print driver, this option needs to be turned on so as not to cause duplicate file name conflicts.

Document Type created as a result of conversion process - the displayed file extension represents the file type created by the conversion process.

Enable support for other installed print drivers - Uncheck this option to have optional Peernet Print Drivers use their default settings instead of sending documents to DocuXplorer.

Note:

The Print driver uses a script file located in the user temp file to know where the Docuxplorer.exe is located when a printing operation is execute from another application. The default location can be adjusted via a registry change.

Instructions:

1. Exit Docuxplorer.exe

2. Do not make these changes unless you confident of how to use the registry services. Backup your registry first.

This registry key will change the location where DocuXplorer's will create the printers script files

[HKEY_CURRENT_USER\Software\Archive Power Systems, Inc.\Docuxplorer\4.0\Defaults\Workstation] PDScriptFilePath = C:\ProgramData\DocuXplorer

3. Start Docuxplorer.exe as the operating system Administrator so additional changes can be applied properly, then start DocuXplorer.exe with normal permissions.

Find Document Settings

1. **If a single document is found, open it automatically -** Check if this option to have DocuXplorer open the document from the Find Document Dialog if only a single document is return from your request. This options only applies as a default action when using saved searches and the DocuXplorer API.

2. **Enable Adobe Full Text Search when opening documents** - when this option is checked DocuXplore will pass the Full Text Search criteria to Adobe when the document is opened. This will enabling the user to locate the page in which the criteria is located.

Email Settings Instructions

Email Type MAPI and OOM

Email Type SMTP

Advanced

Reset all menus - resets all DocuXplorer menus and toolbars to their original default settings. Use this function if menu display is lost or toolbar has become poorly arranged.

Image Processing Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop Ribbon Tab Home | Options | Image Processing Defaults item create the default settings for [Scanning Preview Window](#) display.

Image Processing defaults are workstation specific. Options on this screen can be changed by the user, no administrative access is required.
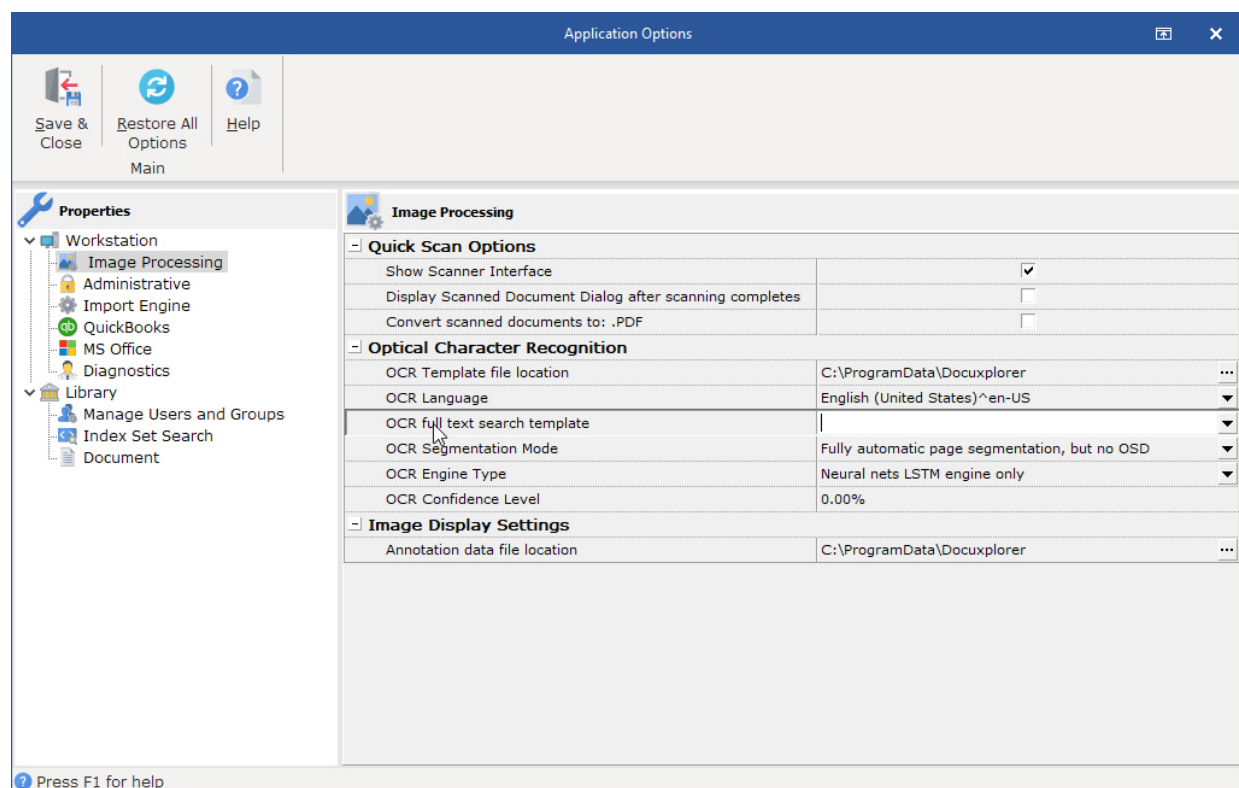
Quick Scan Options

Show Twain Interface - this option when checked will force DocuXplorer to display the scanner's Twain interface when scanning new pages.

Display Scanned Document Dialog after scanning completes - check box to display the Scanned Document dialog box only after scanning completes to view the scan quality and add additional pages.

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Convert scanned documents to PDF - by selecting the check box all scanned documents using the Quick Scan option will automatically be converted to PDF format. DocuXplorer will not automatically convert scanned images to PDF when using the Scanner/Camera option. When using the Scanner/Camera options Save and Close the image, right-click and select <Convert Document to: PDF>.

Optical Character Recognition

OCR Zone data file location - This file holds the information for OCR templates that are created for automated data entry processing. If the file is placed on a network drive make sure users have read and write access to it.

OCR Engine Type - The OCR engine can work at varying speeds Fast, Medium and Slow. Fast is the default and produces results that are acceptable for most document types. Medium and Slow, as the text implies work slower but with higher degree of accuracy.

OCR Segmentation Mode - The OCR engine can work with varying layout of on a page. By default the OCR engine expects a page of text when it segments an image. If you're just seeking to OCR a small region try a different segmentation mode. Note that adding a white border to text which is too tightly cropped may also help

- Orientation and script detection (OSD) only.
- Automatic page segmentation with OSD.
- Automatic page segmentation, but no OSD, or OCR.
- Fully automatic page segmentation, but no OSD. (Default)
- Assume a single column of text of variable sizes.
- Assume a single uniform block of vertically aligned text.
- Assume a single uniform block of text.
- Treat the image as a single text line.
- Treat the image as a single word.
- Treat the image as a single word in a circle.
- Treat the image as a single character.
- Sparse text. Find as much text as possible in no particular order.
- Sparse text with OSD.
- Raw line. Treat the image as a single text line,

OCR Engine - Generally, LTSM should always be used, providing significant speed and accuracy benefits:

- Legacy engine only: Uses the older engine (from IEVision 4.5.2 and older)
- Neural nets LSTM engine only: Uses the new LTSM OCR engine (faster and more accurate than Legacy)
- Legacy + LSTM engines: Uses either LTSM or Legacy
- Default, based on what is available: Uses LTSM if newer TrainedData files are available, otherwise falls back to Legacy

https://github.com/tesseract-ocr/tesseract/wiki/4.0-Accuracy-and-Performance

OCR Language - This option allows a user to change the default language that is used to perform OCR text extraction on documents. If this option is left blank (the default), then the selected interface language is used for the OCR process.

Image Display Settings

Rubber Stamp data file location - This file holds the rubber stamps information defined when editing tiff documents. If the file is placed on a network drive make sure users have read and write access to it.

Administrative Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Set Administrative Defaults from the desktop Ribbon tab Home | Options | Administrative item on the Application Defaults tree.

Setting application defaults on this screen is an Administrator function and can only be changed by users with Administrator permissions.

This item is a global default and need only be set on one workstation.
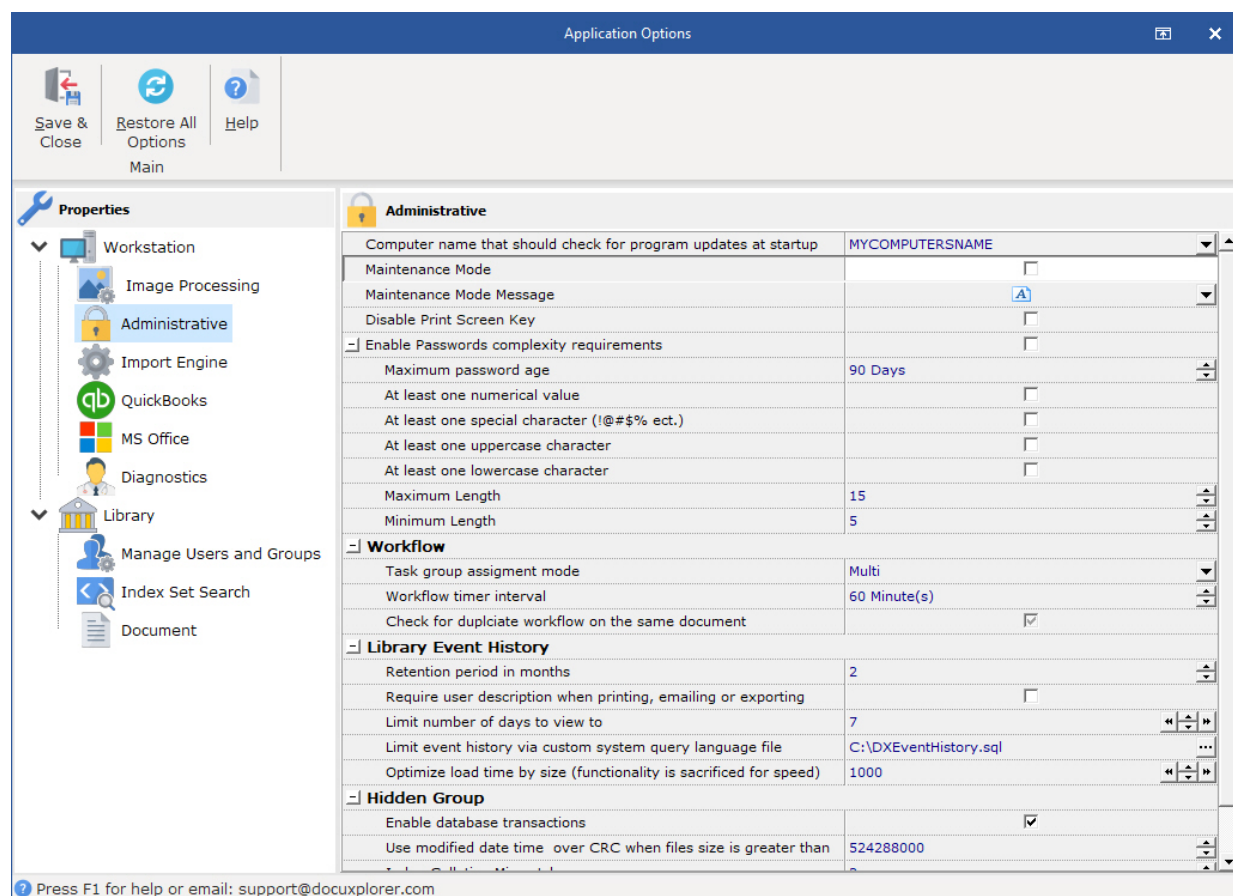
Enable Password complexity requirements

This security setting determines whether passwords must meet certain complexity requirements. Complexity requirements are enforced when passwords are changed or created.

When the "Enable Password Complexity Requirements" box is checked, passwords must meet the following minimum selected requirements:

- Max Password Age: This forces the user to change their password every # days
- At least one numerical value: User must enter a 10 base digit (e.g. 0 through 9)
- At least one special character: User must enter a Non-alphanumeric character(s)(e.g. ~!@#$%^&*_-+=`|\(){}[]:;"'<>,.?/)
- At least one uppercase character: User must enter an uppercase character(s) of a European language (A through Z, with diacritic marks, Greek and Cyrillic characters)
- At least one lowercase character: User must enter a lowercase character(s) of a European language (A through Z, sharp-s, with diacritic marks, Greek and Cyrillic characters)

Log Document Events

This feature allows you to create an audit trail on each document. Check the box to Log Document Events.

Tip:

Logging Document Events needs to be checked as On when used by a health care facility to comply with HIPAA requirements.

Require User Description when Printing, Email or Exporting

Allows administrators to require users to enter a description as to why a document is being printed e-mailed or exported from DocuXplorer.

Tip:

When e-mailing a document from DocuXplorer it is recommended that a user be required to enter the name of the e-mail recipient.

Library Event History

The following Library Event History properties "Limit number of days to view", "Limit Event History via Custom System Query Language File" and "Optimize Load Time by Size" are tools to help with performance issues when viewing large amounts of Library Event History.

Limit number of days to view to

This property allows administrators to limit the event history by date. Enter the number of days from the current date to be shown. Setting the number to 0 allows the Library Event Log to display all records and allows the administrator to delete selected records history.

Limit Event History via Custom System Query Language File

This property allows administrators to assign an SQL file to be executed when viewing Library Event History. This enables an administrator ultimate control over the amount data viewed by defining date and event type criteria to be viewed. Within the Library Event History dialog administrators can select File->Save SQL Criteria to create an SQL file as an example in which to build from. DocuXplorer provides consulting support for clients that need assistance in creating custom SQL files.

Tip:

As a consulting service DocuXplorer Technical Support can help build the SQL file to create your custom display.

Optimize Load Time by Size

This feature allows administrators to optimize load time. The default number of records to display is 10,000. If more than 10,000 records are displayed grouping and filtering functionality will be disabled. You may increase or decrease the default number of records to be displayed before grouping and filtering is disabled.

Tip:

If you have a very large number of records to display and need to filter the data it is recommended that Limit Event History via a Custom System Query Language File be set as described above.

Disable Print Screen Key

This feature provides the ability to disable the Print Screen Key to prevent users from using Print Screen to copy a document to the clipboard and pasted into another program.

Tip:
- This feature is a HIPAA requirement.
- The feature is not enabled until DocuXplorer is closed and reopened.
- This is a global setting and when checked will disable the Print Screen button for all DocuXplorer users.

Enter the computer name that should check for updates at startup

From the drop-down list select the name of the computer to automatically check for program updates. The user logged into DocuXplorer does not need administrative rights for this process to execute. Administrative rights are need

to execute this process manually, select Help | Product Updates from the main window.

Tip:

On Enterprise systems select only one workstation name to check for updates. The update will prompt to have all other DocuXplorer users close the program on their workstations. Once all other workstations have shut down run the download and update just once and automatically update all users connected to the server when they reopen DocuXplorer on their desktop.

DocuXplorer Enterprise users who are not running the executable from the server will have to download and install the update to each workstation using the Product Update item in the Help drop-down menu of the Menu Bar.

Maintenance Mode

When this option is check no other user other than the Administrator's account will be allowed to access the application. This allow the Administrator to Perform Maintenance activities. Make sure you know the Administrators password before using this feature. The default password is "admin".

Maintenance Mode Message

Use this description text to communicate to user why and when application maintenance will be completed.

Workflow Settings

Task Group Assignment Mode:

Task group assignment mode defines what happen when a task is assigned to a group (not an user).

- **Multi:** A task will be created for each user in the group. So, if a group has users "john" and "maria", one task will be created for John, and another to Maria, and the tasks will be independent (both will have to be completed). When this option is selected, there is a set of logic based upon the completion statuses reached by all of these tasks. This logic is as follows: The completion status to hold the last majority will be selected in the workflow as the direction the workflow will go.
  - For example. if there are four users in a group that can complete a task as "Accepted" or "Rejected", and the tasks are completed in this order: Accepted, Rejected, Accepted, Rejected, the task will be assigned the completion status of Accepted. Although the final count is two Accepted and two Rejected statuses, The Accepted status held a 2:1 majority when the third task was completed, so the workflow will follow that completion status.

- **Single:** A single task will be created that will be visible for all users in the group. If you later include/remove users to/from the group, the existing tasks will become not visible for users removed from the group, and will become visible to users added to group. Any user from the group can update the task, including finishing it.

Workflow interval timer

The workflow timer interval specifies how often the workflow job fires to process pending expired workflow tasks. Since this process is running on each desktop copy of DX this event does not need to fired often. The default value is 60 minutes.

Check duplicate workflow on the same document

This prevents users from executing same workflow on a document more than once.

Global Settings for all Computers

Located in the same directory where the DocuXplorer.exe program is installed is a files called docuxplorer.ini. This file contains settings for all users.

Import Engine Defaults

This Help topic refers to DocuXplorer Enterprise, and Professional only when the optional Import Engine has been purchased and registered.

The Import Engine Defaults Dialog box allows a user to enter the default data locations for Import Engine files.
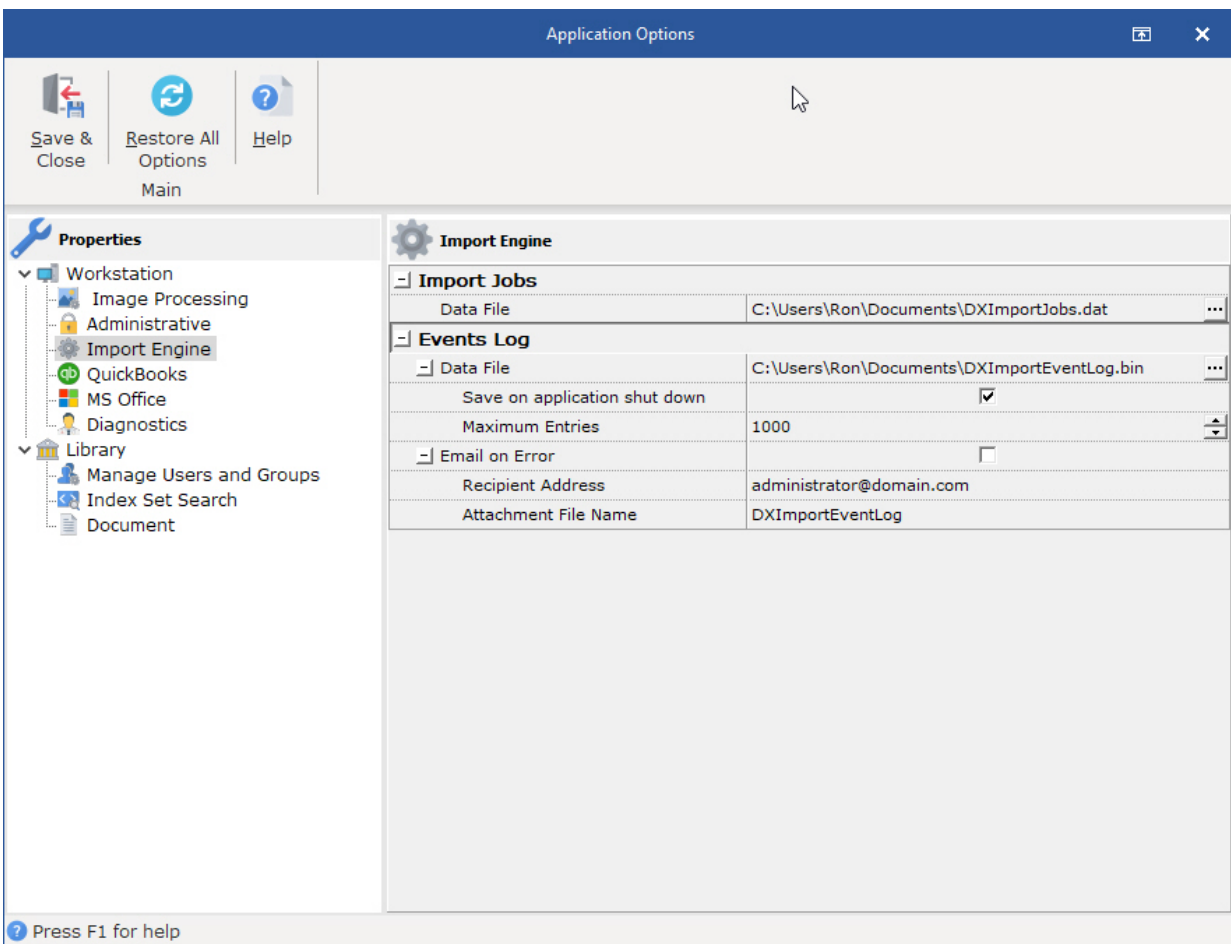
Import Jobs

    Data File - the default location for Import Job data files and Import Job execution. The Import Job data will be stored in a file named DXImportJobs.Dat.

Events Log

Data File - the default location for the Import Engine log files. The log data will be stored in a file named DXImportEventLog.Bin. These log files can be used to determine if an error exists in the Import Job setup.

Save on application shut down - automatically saves the Import Engine's Event Log to the specified location when exiting the application

Maximum Entries - The maximum number of entries in the Import Engine Event Log. When reached, the log entries will be overlaid starting with the oldest entry.

Email on Error - When the Email on Error is set and an error occurs, an email will be sent to the specified address indicating the issue. The Email service is configured via Tools | Options | Workstation | Email Settings. It is suggested that you use the SMPT service as it is easier to setup unattended email sending when there are unexpected errors during the import process.

Recipient Address - Email address of the email receiver.

Attachment File Name - Name of Event Log file.

QuickBooks Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

This Help topic refers to all DocuXplorer editions only when the optional DocuXplorer for QuickBooks Integration package has been installed

The QuickBooks Integration option dialog box allows a user to register or unregister DocuXplorer with QuickBooks and set country codes from the US, UK and Canada.

Registering QuickBooks adds a menu into QuickBooks that allows a user to add and find documents stored in DocuXplorer. If you have QuickBooks on the installation computer DocuXplorer registers with QuickBooks by default. The QuickBooks Integration is available even during the free trial..
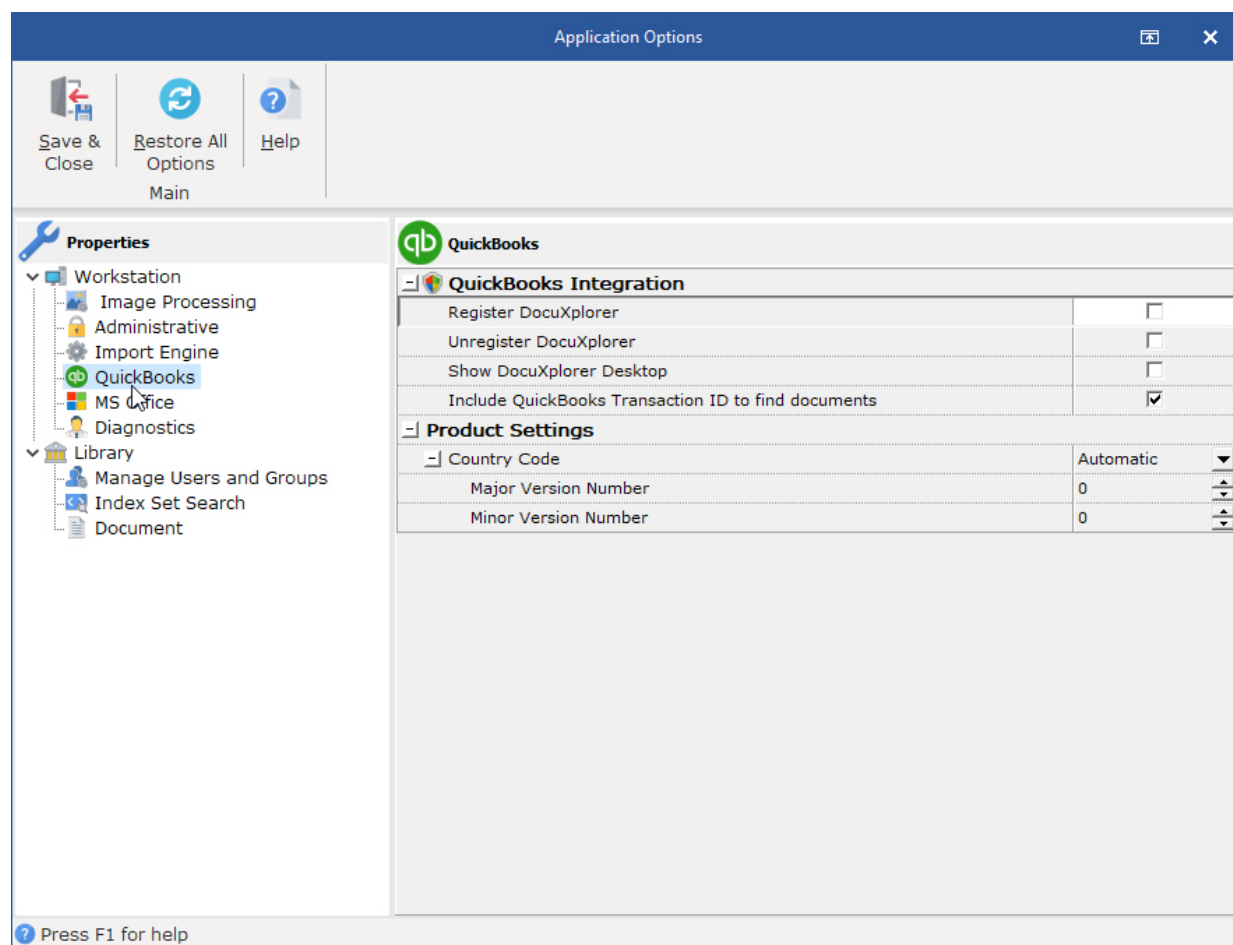
QuickBooks Integration

Register DocuXplorer - The process of registering with QuickBooks places the <DocuXplorer> menu on the QuickBooks <File> menu.

Unregister DocuXplorer - Unregister will remove the "DocuXplorer" menu from the QuickBooks menu .

Show DocuXplorer Desktop - when enabled the DocuXplorer Desktop will always display when DocuXplorer is initialized (When adding or finding a document the first time in a session though the QuickBooks Integration). By default this options is not enabled and a user must select to show or hide the DocuXplorer Desktop of the QuickBooks File/DocuXplorer Menu item

Include QuickBooks Transactions ID to find Documents - When checked DocuXplorer will locate documents based on QuickBooks unique ID, So even if the QuickBooks company name, date, reference number changes DocuXplorer will still be able to find the associated documents. With this feature left unchecked, DocuXplorer will use the traditional method of locating documents by the key index fields associated with a QuickBooks transaction and will be backward compatible.

How to Upgrade your QuickBooks Index Sets:

If you have not customized your QuickBooks Index Set your can re-import them. See "Installing the DocuXplorer for QuickBooks Integration Utility" for more details. Otherwise, you can add a new text field to each QuickBooks Index Set and change the display Label to the value "QBID".

Product Settings - This information is managed by DocuXplorer automatically and only needs to be changed if directed by a support technician.

Country Code - Enter the Country Code for the version of QuickBooks you are using. Or select a country code from the drop down list. Codes are available for The U.S., Canada and the U.K.

Automatic - The Country Code as set in the <Language> tab of the <Regional and Language

Major Version Number - The Major Version number of QuickBooks installed on the workstation.

Minor Version Number - The Minor Version number of QuickBooks installed on the workstation.

Microsoft Office Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The MS Office Default dialog box available in Tools/Options allows a user to integrate DocuXplorer with Microsoft Outlook, Word, Excel, and Power Point and the default for operation with these programs.

Close all Office programs when setting or changing DocuXplorer - MS Office defaults.
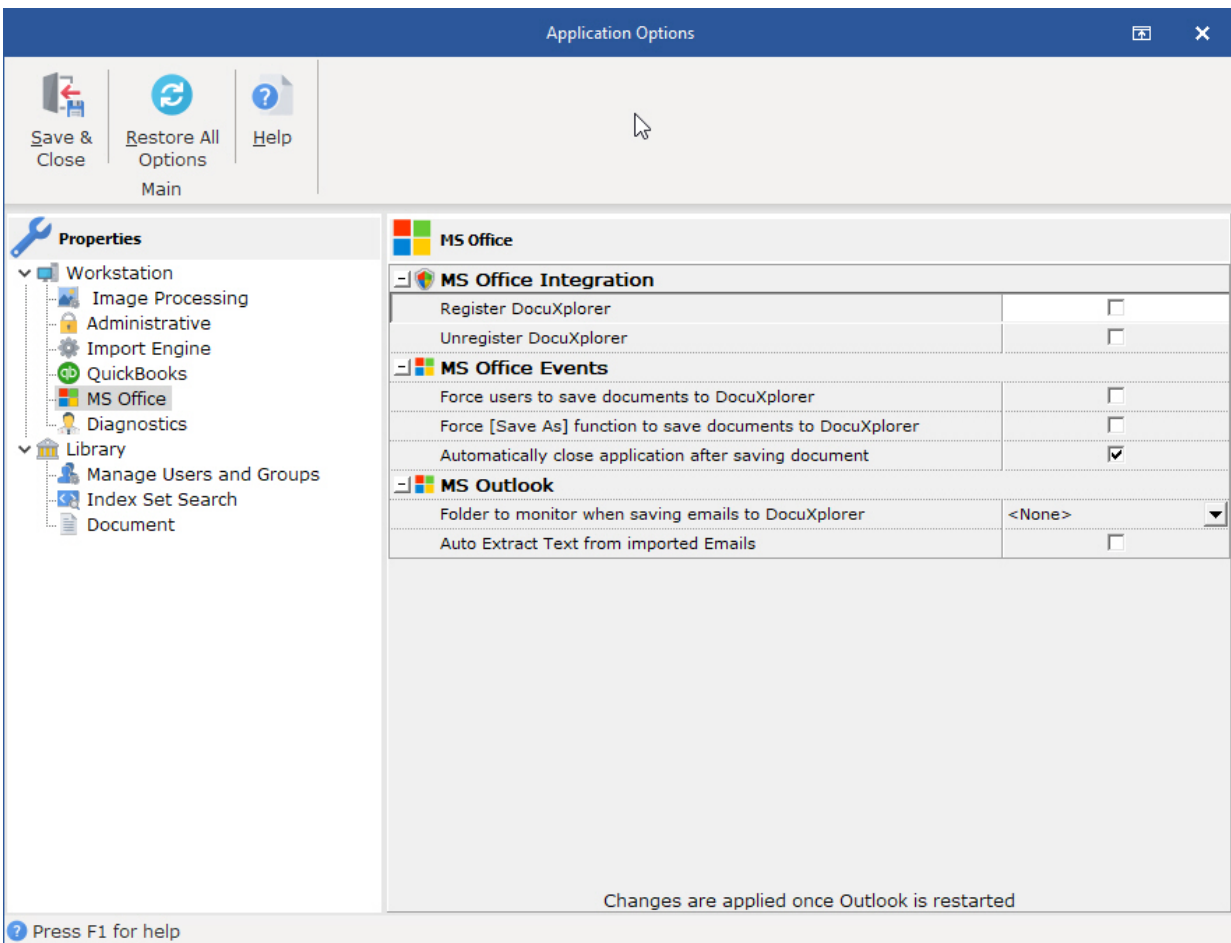
Use this dialog box to install or uninstall the DocuXplorer integration with Microsoft Office programs.

MS Office Integration

Register DocuXplorer - The process of registering places the DocuXplorer Toolbar and other Add-ins into the allowed Microsoft Office programs.

Unregister DocuXplorer - The process of unregistering removes the DocuXplorer Toolbar and other Add-ins from Office programs.

Tip

Users can install and register DocuXplorer as a COM Add-in from within each Microsoft Office program. See the item Installing Microsoft Office Integration for more information.

MS Office Events

Force users to save documents to DocuXplorer

> Checking this box will force the <File> <Save> item in Office programs to save documents to DocuXplorer rather than a hard drive as a default.

Force "Save As" function in MS Office to save documents to DocuXplorer

> With this box checked users are forced to save documents to DocuXplorer when using the "Save As" function in support MS Office programs.

Automatically close application after saving document

> Checking this box will automatically close Office applications after document is saved to DocuXplorer. The exception is Outlook. Even if checked Outlook will remain open when saving e-mail messages and attachments.

> When "Automatically close the application after saving document" is checked and there is more than one document open in an MS Office program, the Office program will not close. Only the document being added to DocuXplorer will close.

Outlook

Folder to monitor when saving emails to DocuXplorer

> Allows user to select a folder to monitor. When an email is added to that folder DocuXplorer will automatically run and ask the user to select a location to save the email and index it. The body of the email can be automatically added to the description field.

Auto Extract text from imported emails

> When in Outlook a user can save the selected email to DocuXplorer. This option now can extract the text of the email and will post it to the OCR text field so emails can be full text searched.

Diagnostic Logging Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Diagnostic Logging Defaults can be reached from the desktop ribbon tab Home | Options | Diagnostic Logging item. Options on this screen can be changed by the user, no administrative access is required. These defaults are workstation specific. Diagnostic Logging will identify problems in DocuXplorer by tracing the program actions performed in the listed category. It is used as an aid to provide you with the highest quality technical support.

Do not change any of these defaults until instructed to do so by DocuXplorer technical support personnel.

To change a default:

  Select a category by placing a checkmark next to the item to be traced.

The trace log file <C:\Tracelog.csl> will be created by default in the C:\ root directory of the Workstation.

Although you can change the name and location of this file we strongly recommend that you don't so it can be easily recognized and located by support engineers.

Application Options

Save &
Close

Restore All
Options

Help

Main

Properties

- Workstation
  - Image Processing
  - Administrative
  - Import Engine
  - QuickBooks
  - MS Office
  - Diagnostics
- Library
  - Manage Users and Groups
  - Index Set Search
  - Document

Diagnostics

Output Destination	
File	☐
File Name	C:\Users\Ron\AppData\Local\Temp\DXTraceLog.csl
Viewer	☐

Trace Category	
Active Directory	☐
Application Settings	☐
COM Automation	☐
Common	☐
Data Access	☐
Document Viewers	☐
Document List	☐
Event Log	☐
Explorer Window	☐
Find Dialog	☐
Field Manager Dialog	☐
Import Engine	☐
Library Tree	☐
Main Form	☐
Workflows	☐
Scanning	☐
Tools	☐
Registration	☐

Press F1 for help

Library Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business ☑Professional ☑ Personal

The Library default can be reached from the desktop ribbon tab Home | Options | Library
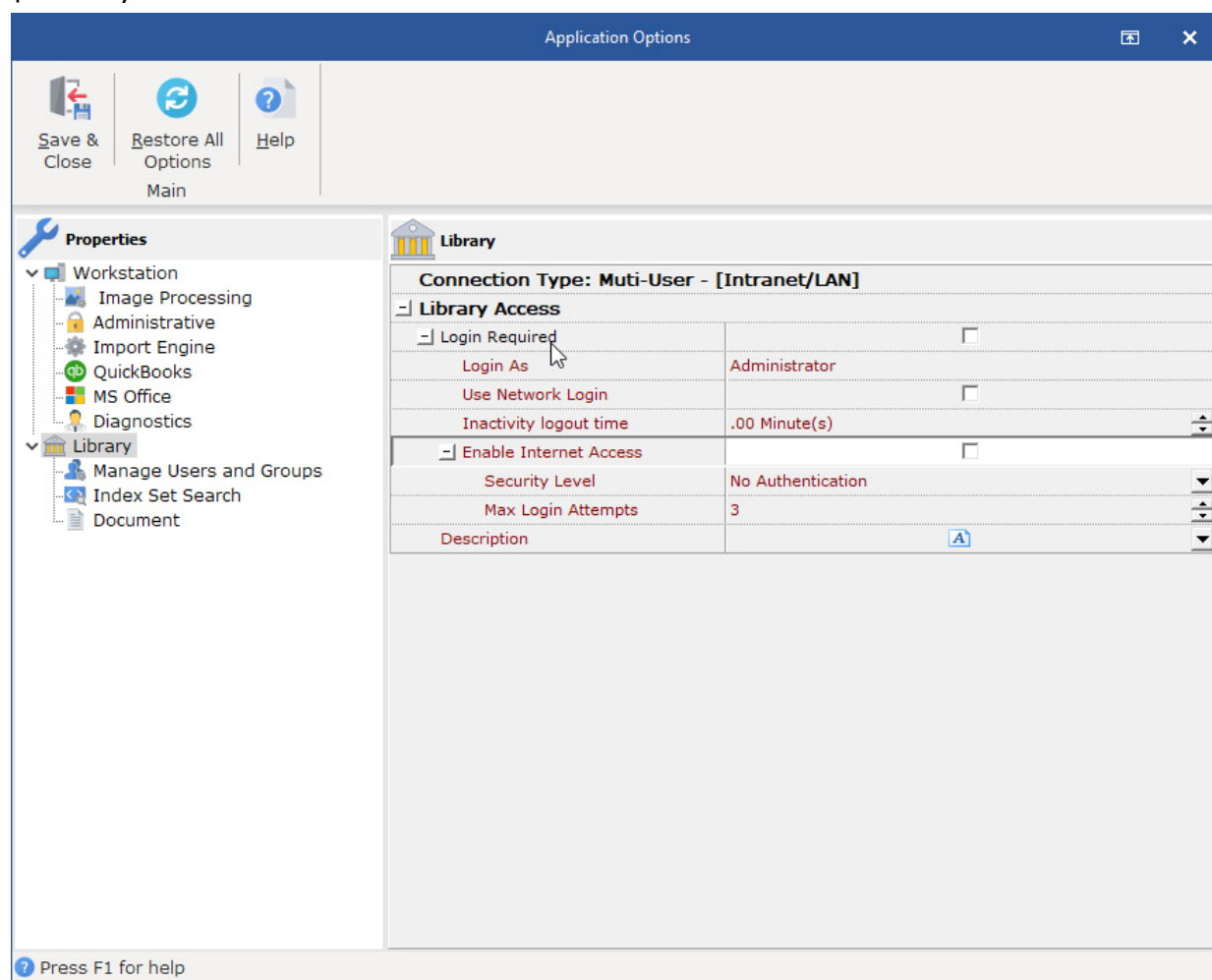
Setting library defaults on this screen is an Administrator function and can only be changed by users with Administrator permissions.

These settings enable administrators to set defaults for connecting to the DocuXplorer Library database either locally or over the Internet, and require user login and inactivity logout time.

DOCUXPLORER

Tip:

- Options to be set will vary according to the edition of DocuXplorer and the features of that edition you choose to use.
- Only users who have been designated as Administrator can make changes to any of the default settings.

Click one of the following links to view options for the DocuXplorer edition you are using:

DocuXplorer Personal

Library Options for DX Personal - a single-user edition of DocuXplorer.

DocuXplorer Personal has no Library defaults to set.

DocuXplorer Professional

Library Options for DX Professional - a single-user edition of DocuXplorer.

Library Access (these items affect defaults for all users in a Library)

Login Required

When checked, requires all users in a Library to use Login names and passwords. This setting is an administrator function will affect every user in a Library.

For users on a local machine (Professional) or local area network (Enterprise) login is not required but can be enabled.

Login as

Enter the default Login name to be displayed at this workstation. Users can change the Login Name and password in the Login dialog box that appears when DocuXplorer is started on a workstation.

Use Network Login

When selected this feature enables automatic user login, when the DocuXplorer user login and workstation login are the same. No password would be needed in DocuXplorer as the workstation user login will determine access.

Tip: If the password is left blank, users will be able to log in as another user without entering a password. Secure the account by entering in a password. The end user does not have to know the password, so use the same password as your Administrator account for simplicity.

Inactivity Logout Time

DocuXplorer can automatically logout a user/workstation after a set period of inactivity. Enter the period of inactivity to allow before logging out the user/workstation.

Description - Contains a copy of DX Settings and Registration information for technical support services

Tip:

When a Login is required the administrator will need to create a User List with the names of users and their associated password.

DocuXplorer Enterprise

Library Options for DX Enterprise - a multi-user edition of DocuXplorer.

Library Access (these items affect defaults for all users in a Library)

Login Required

When checked, requires all users in a Library to use Login names and passwords. This setting is an administrator function will affect every user in a Library.

For users on a local machine (Professional) or local area network (Enterprise) login is not required but can be enabled.

Login as

Enter the default Login name to be displayed at this workstation. Users can change the Login Name and password in the Login dialog box that appears when DocuXplorer is started on a workstation.

Use Network Login

When selected this feature enables automatic user login, when the DocuXplorer user login and workstation login are the same. No password would be needed in DocuXplorer as the workstation user login will determine access.

Tip: If the password is left blank, users will be able to log in as another user without entering a password. Secure the account by entering in a password. The end user does not have to know the password, so use the same password as your Administrator account for simplicity.

How Active Directory Users and Groups can Access DocuXplorer

DocuXplorer can import users and groups from Active Directory without synchronizing the passwords. Users will experience the same benefits by following these directions:

1. [Import users and groups](#) from Active Directory.
2. Set each DocuXplorer user's password to a value that only the Administrator knows.
3. Select: Tools, Options, Library, Use Network Login.

When the user starts their computer, they are prompted for their User ID and Password. These are verified by the operating system.

Once the user starts DocuXplorer the system will lookup and validate their User ID in the *DocuXplorer User List* (via DocuXplorer Import).

If the user's name is found then they are granted access because the operating system already verified their identity. Only the Administrator knows the user's actual password. Other users cannot impersonate other users unless the operating system was compromised.

Tip:

This feature will negate the ability to provide an Inactivity Logout Timer. If Inactivity Logout is required do not use this feature.

Inactivity Logout Time

DocuXplorer can automatically logout a user after a set period of workstation inactivity. Enter the period of inactivity to allow before logging out a user.

Enable Internet Access

Select this check box to allow access via the Internet. A Login is required when you set DocuXplorer to enable Internet access and is only available in the Enterprise program.

Security Level

Security Level can be set for Internet access. The security level can be set for either No Authentication, the default Authentication or Authentication and Encryption.

No Authentication

This level provides no authentication or encryption. This might be the choice if the Sybase Advantage Internet Server were being used in an intranet environment. Users are not prompted to enter a user ID and password on the database application startup.

Authenticate

This Level requires users to authenticate but no encryption is used. Users are prompted on database application startup to enter a user

ID and password. User access to database files is limited according to the user rights in the Advantage Data Dictionary.

Authenticate and Encrypts

This level requires users to authenticate and encrypts all data during the session. Users are prompted on database application startup to enter a user ID and password unless "Use network login" is selected. The encryption algorithm is an industry-standard stream cipher that uses 160-bit keys.

Max Login Attempts

Determines the maximum number of Login attempts to be processed before the user login is disabled.

Description - Contains a copy of DX Settings and Registration information for technical support services

Tip:

When a Login is required the administrator will need to create a User List with the names of users and their associated password.

The Inactivity Logout Time setting can be found in the Home | Options | Library Defaults. in Library Access. This option is a global setting. Set this option once to affect all users.

- This function allows DocuXplorer to automatically logout a user after a set period of workstation inactivity.
- Once a user has timed out they can reenter the Library by entering their user name and password.
- Once a user has been logged out that concurrent seat will be available to other users.
- The maximum value you can enter is 61min
- • Inactivity logout cannot be used with Network Login enabled. Instead, your Network Administrator will be responsible for limiting access to the workstation after a period of inactivity.

Tip:

This feature is required for HIPAA compliance. When a user leaves their computer unattended this assures that confidential data will not be available for access without a new login and password.

An added advantage of Inactivity Logout is its ability to log a user off who is not using the program and making that seat available to another user ultimately providing the most efficient use of your DocuXplorer investment.

DOCUXPLORER

Manage Users/Groups

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

The Manage Users/Group Window can be reached from the Desktop Menu Bar item Tools/Options/Manage Users/Groups.

Setting application defaults is an Administrator function and can only be changed by users with Administrator permissions except for the ability to change a user password.

When the administrator has set the Library default to require login they must also create a list of users and associated passwords.

Recommendation:

Before setting DocuXplorer security defaults read the Security items of the program help.

Users who have been assigned Administrator permissions will have full read/write access to every object in DocuXplorer including the ability to set global defaults and change properties and security permissions. A user other than an administrator can only be given permission to change their password.

All names added to the User/Groups List are specific to the Library and need only be set once.

Changes or additions to the user list can be accomplished on any workstation attached to that Library.

Groups allows you to set specific security permissions for groups of individuals. The Groups List allows you to add users to a Group. .

Manage User/Groups - allows an administrator to add new users and groups and use drag and drop to add users from the user list to a group.
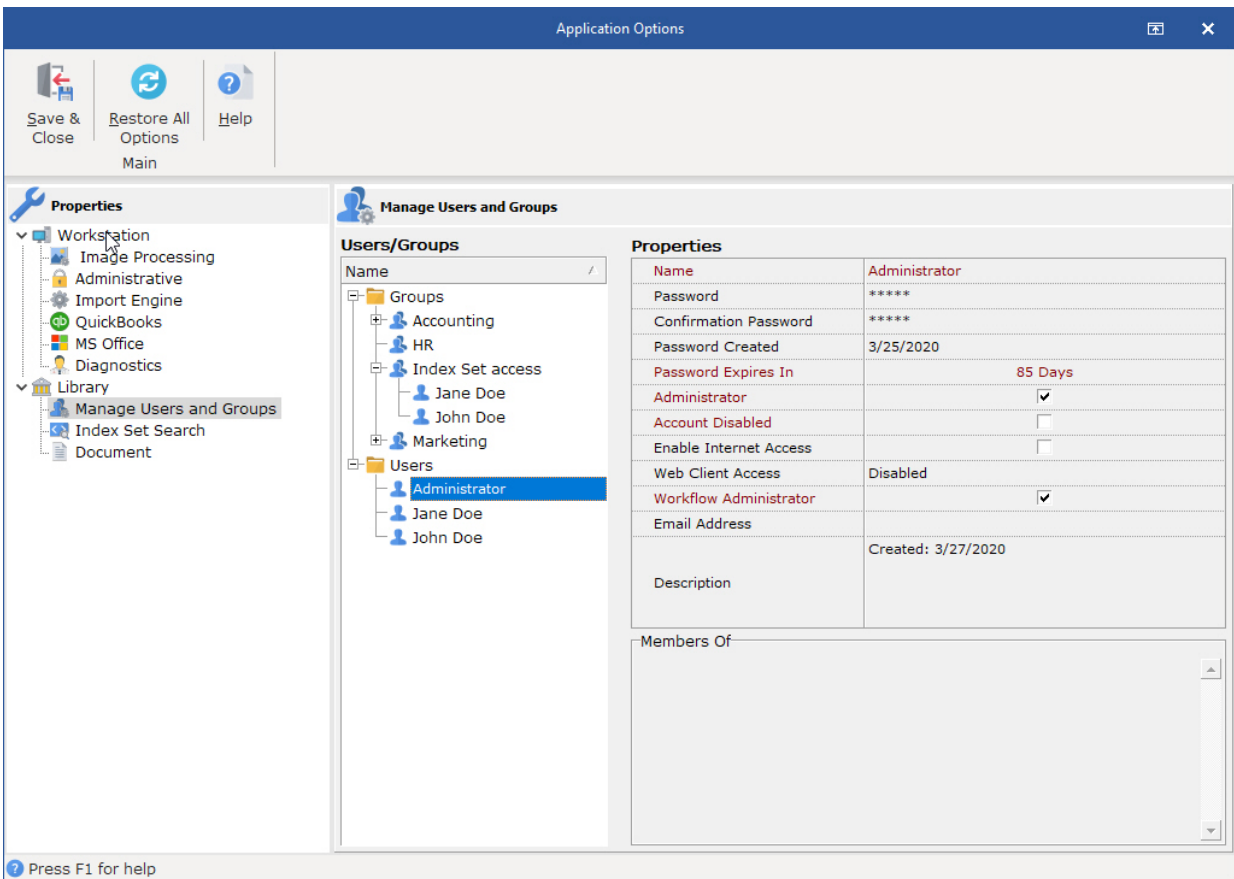
Properties - allows an administrator to set passwords and other user specific items

Name - user name

Password - enter the user password. The user password is case sensitive.

Confirm Password - reenter user password

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Password Created - this is used in conjunction with Administrative Defaults and enabling password complexity rules. This value determined when the password was created for each user and based on the complexity rules when it will be need to be renewed.

After a user's password expires, they will be asked to create a new password when they try to log in again. A screen will appear asking for the old password, the new password, and new password confirmation.

Administrator - check if user is an administrator. Administrators have full rights to DocuXplorer and can make changes to properties.

Account Disabled - allows administrator to disable a user without removing them from the user list.

Desktop Internet Access - check this item if a user is using the DocuXplorer Desktop and will access the server via an Internet connection. This is not required if the user will access via Terminal Services, Remote Access or Citrix.

Web Client Access - Select one of three options below to control what method a user can access the Web Client via a internet browser

Disabled - no access is allowed

Read Only - Access is allowed but the user will not be able to make any changes

Read Write - Access is allowed and the user will be able to add/modify document

Description - allows users to enter information about the user. This field will also display the Network Source if the user was added via import.

Member of - provides a list of groups the user is a member of.

Tip:

To provide the fastest access to documents via the Internet, Terminal Services or Citrix are recommended.
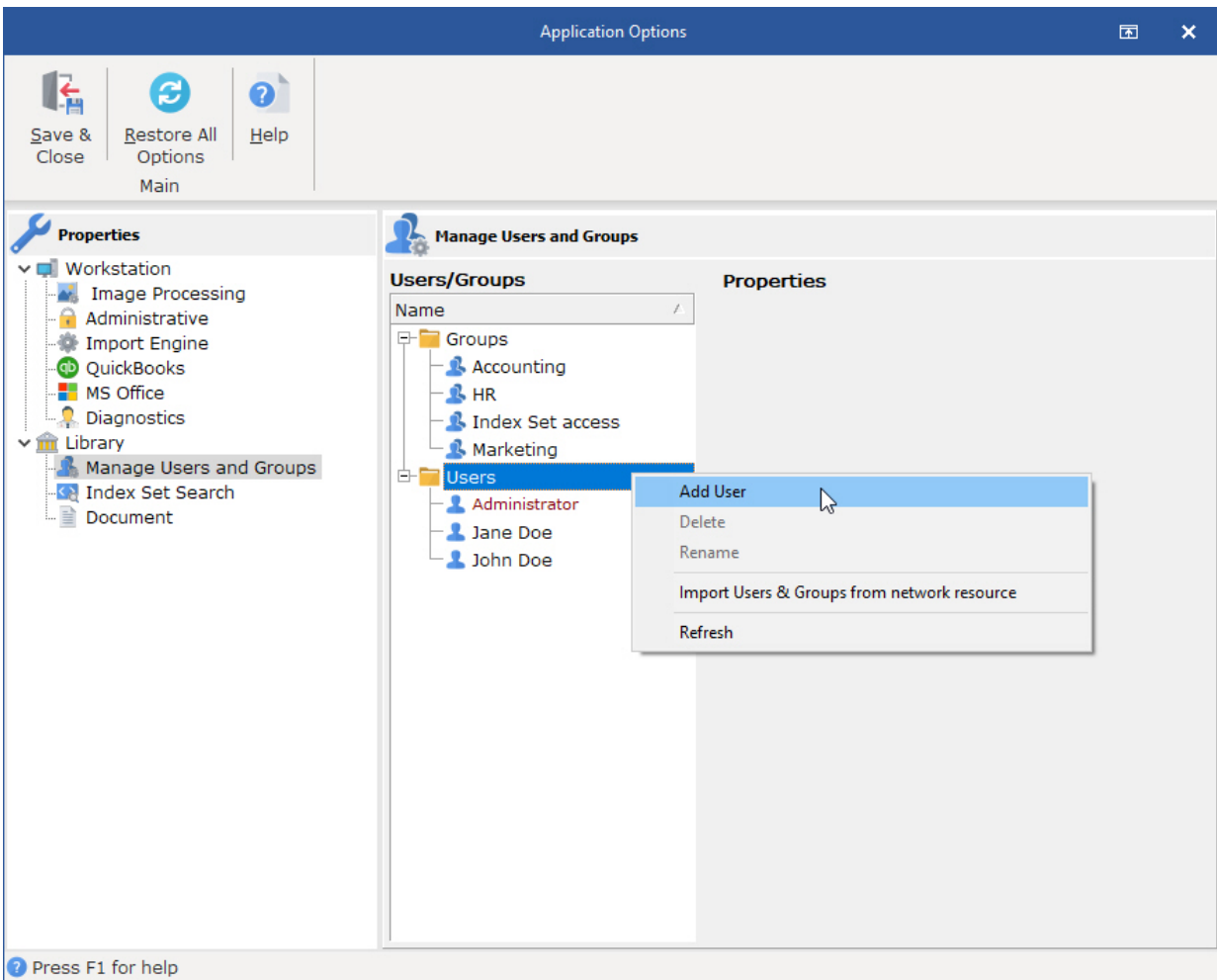
To add a User;
- Right-click in the Manage Users/Groups Windows and select Add from the menu
- Enter the User Name
- Enter the users' password into the Password field

- Enter the same password in the Password Confirmation field
- Check Allow Internet Access if using a VPN connection
- Check Administrator if user is to have full read/write access to all objects in DocuXplorer
- Check Account Disabled to prevent access by user to the DocuXplorer Library
- Repeat to add additional users
- When the complete list has been created click the Menu Bar item Save and Close

Tip:

- The Administrator user can not be deleted or renamed. The default Administrator password of " admin" should be changed as it is not secure. **Do not forget your Administrator password, if you do and are unable to access DocuXplorer because of a forgotten password contact tech support to assist with this issue. Support for this issue will incur a Level 1 Support Incident charge.**
- Users can change their own password at any time but cannot make any changes other than their own password in the User/Groups Settings

To add a Group:

- Right-click Groups in the Manage Users/Groups Windows
- Click the Add button to bring up the Add Groups Dialog
- Enter the Group Name
- Enter Group Description as needed
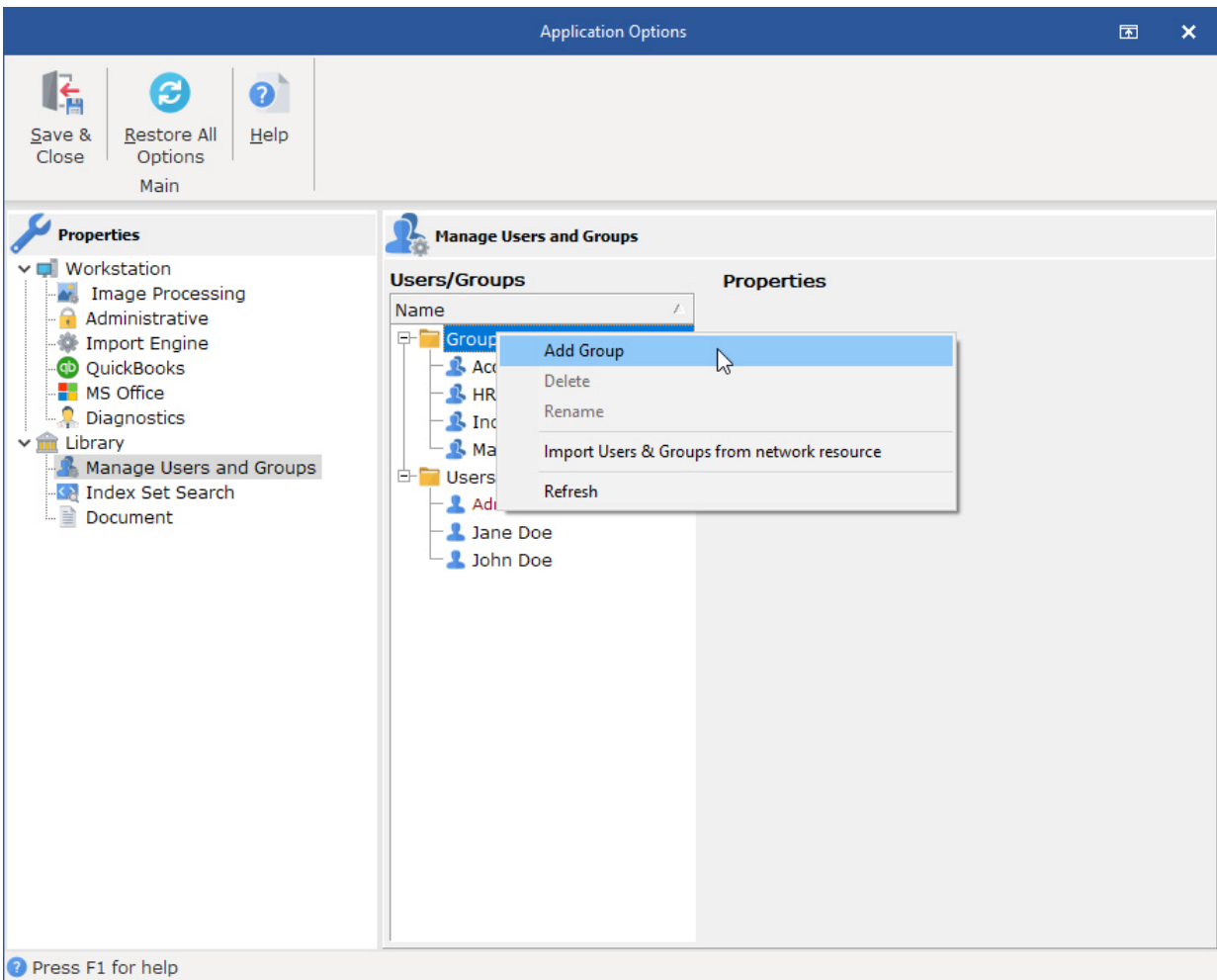
To add a user to a group:

- Drag and drop the user from the user list onto a group

Tip:

A user added to a group automatically inherits the group's permission sets.

To delete a user or group from the list:

- Right-click in the Manage Users/Groups Windows and select Delete from the menu
- Click Save and Close

To rename a user or group from the list:

- Right-click in the Manage Users/Groups Windows and select Rename from the menu
- Type in the new name
- Click Save and Close

Tip:

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Renaming of a user or group should not be executed while the users in the group have DocuXplorer tables open.

Import user and groups from network resource

DocuXplorer will automatically populate the Group or User List with selected groups or user names contained in a Microsoft Active Directory. DocuXplorer does not synchronize to the Active Directory so any changes or deletions made in the Active Directory will also have to be made in DocuXplorer.

To retrieve user names:
- Right click in the Users/Groups Window to bring up a menu
- Select Import user and groups from a network resource
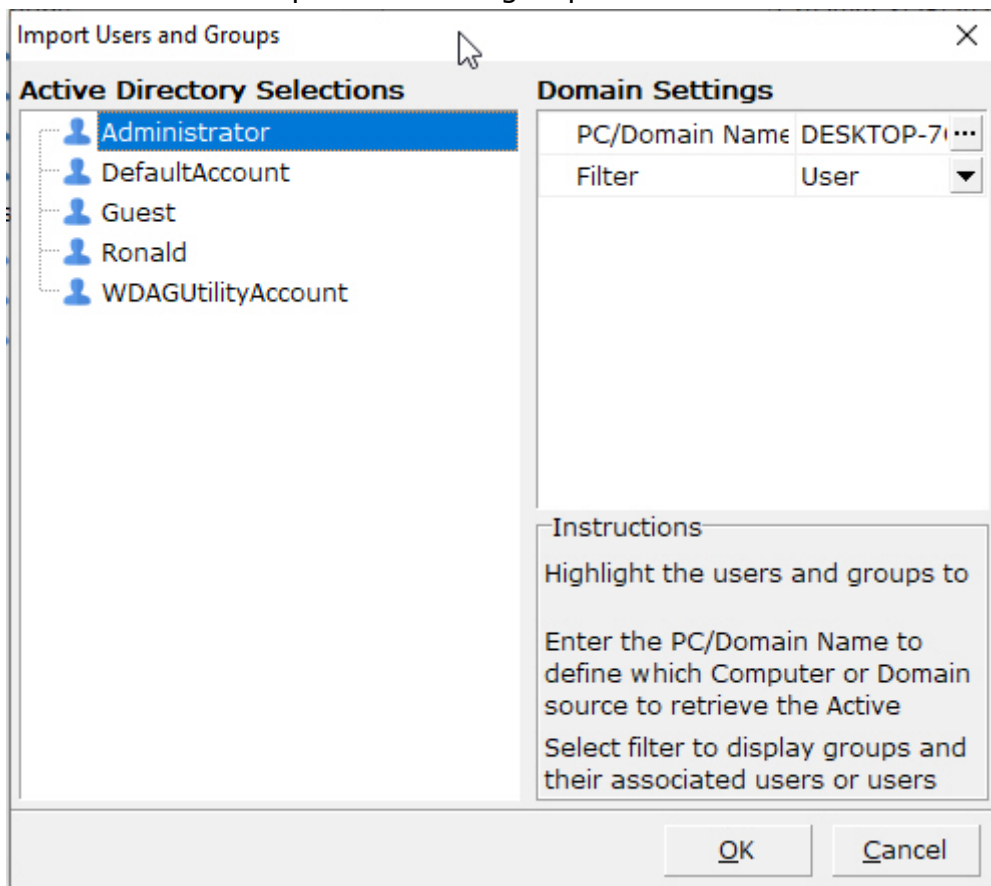
- Select the name of the server or workstation with the list to retrieve
- Highlight the groups/users to add from the list of Active Directory Selections

Tip:

When selecting, highlight both the group and the users in that group to import to DocuXplorer. If you select a group without selecting its users, only the group item will be imported.

- Click OK
- Create passwords for each user name

Tip:

- To speed the importation process it is recommended that when importing users from the Active Directory you choose only users that will need access to the DocuXplorer Library.
- Importing only those users who will need access to the DocuXplorer Library assures maximum speed in opening objects in DocuXplorer.
- Change the display of the Active Directory Selection List using the filter item to display Groups and their associated users in a logical tree or as a list of users.

Refresh - will refresh the screen display

Index Set Search Options

This Help topic refers to the following editions:
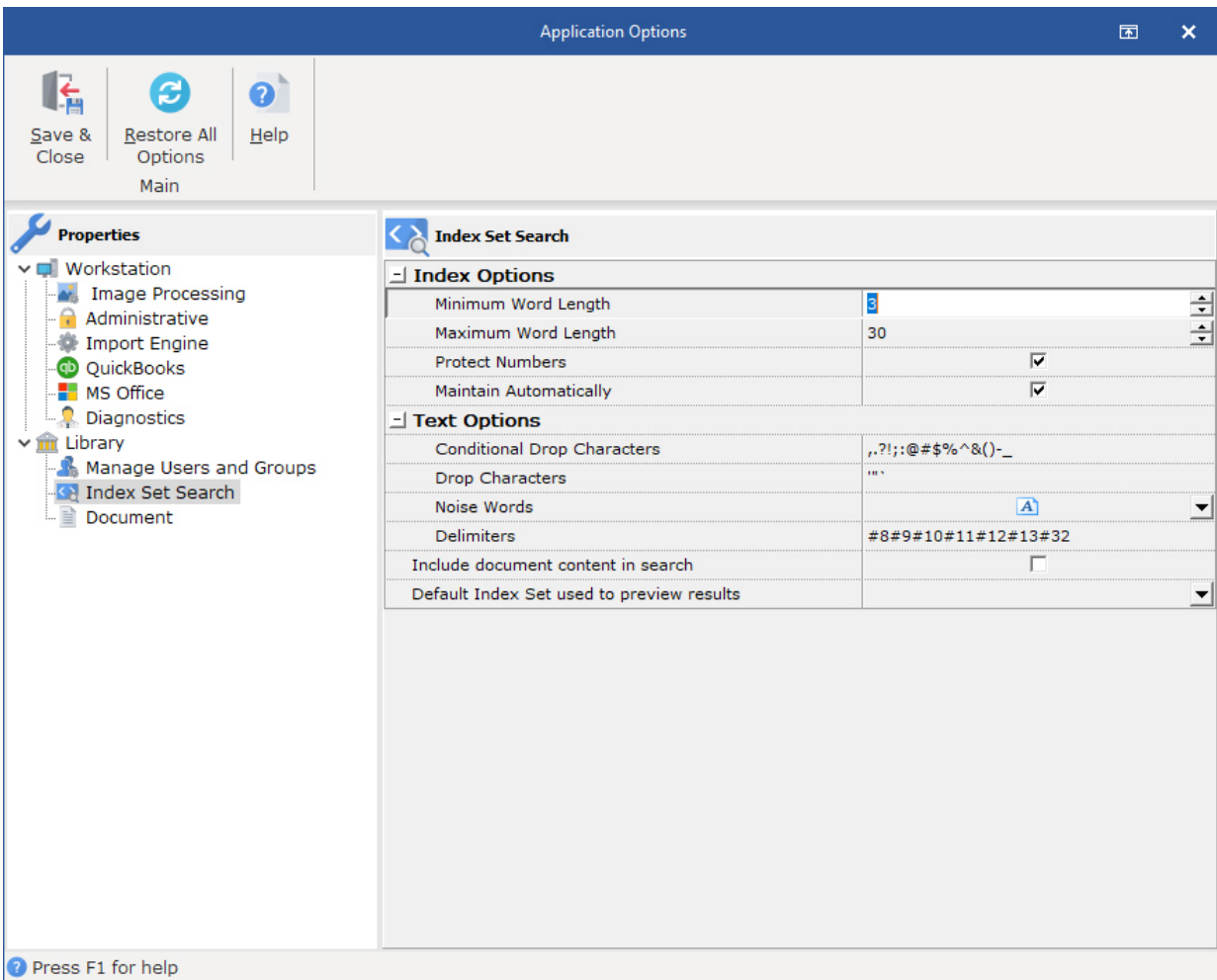☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Set global default Index Set Search Options in the Home | Options | Index Set Search item of the Desktop menu bar.

Index Set Search is the ability of the program to search on index data that has been associated with a document. This data most often entered by a user is the most effective method of searching for documents. **To properly search for documents this feature should always be enabled.** The purpose of the Application Options dialog is to refine the methods by which the Index Search function operates.

Setting application defaults is an Administrator function and can only be changed by users with Administrator permissions.

These defaults affect only new DocuXplorer Cabinets. Any Cabinet created prior to a change in these defaults will not be affected. [Click here for more information on creating Full Text Search statements](.).

Index Set Search options can be changed for each Cabinet as a property of the object.

Default settings are as follows;

Conditional Drop Characters - Conditional drop characters are a special type of drop character. These characters are dropped only if they are at the beginning or the end of a word. This provides a mechanism for allowing certain characters to be maintained if they appear inside words. The default conditional drop characters are (,.?!;:@#$%^&()-_).

> For example:

>> One of the default conditional characters is the period. This means that periods on the ends of words will be stripped from the text, but if they are in the middle of a word (e.g., in a number such as 48.5), then they will be maintained.

Drop Characters - Drop characters are a set of characters that are simply ignored by the FTS (Full Text Search) engine. Drop characters are ignored in both the text and in search strings. The default drop characters are the double quote, the

apostrophe (single quote), and the back quote (also known as the grave accent). Administrators can add additional Drop Characters in the Drop Characters/Additional field.

For example:

If the defaults are used and a name such as O'Malley is in the text, the FTS engine will store OMalley (without the apostrophe) as the key value. A search word of either OMalley or O'Malley will find it because the apostrophe would be stripped out of the search word as well.

Noise Words - The noise words are words that are ignored by the FTS engine. Once a word is recognized according to the other rules (after obeying delimiters, drop characters, minimum word length, etc.), the word is checked against the noise word list and is ignored if it is found in that list.

The default noise word list includes the following words:

about after all also and another any are because been before being between both but came can come could did does each else for from get got had has have her here him himself his how into its just like make many might more most much must never now only other our out over said same see should since some still such take than that the their them then there these they this those through too under use very want was way well were what when where which while who will with would you your

Delimiters - Delimiters are the set of characters that define word boundaries. The default set of delimiters includes the white space characters, which are the space (ASCII decimal 32), backspace (ASCII decimal 8), tab (ASCII decimal 9), newline (ASCII decimal 10), vertical pipe (ASCII decimal 11), form feed (ASCII decimal 12), and carriage return (ASCII decimal 13). This works for most standard text documents. WordPerfect documents are an example of documents that use delimiters to define boundaries. DocuXplorer has been programmed with the symbol (highbit) character € that WordPerfect uses to define its boundaries.

Delimiters are always case sensitive. If, for example, you want to use "x" (ASCII dceimal 120) and "X" (ASCII decimal 88) as delimiters, then you must specify both characters as delimiters regardless of the case sensitivity option.

Index Options

Minimum Word Length - This option specifies a minimum cut-off point for word recognition. Any word that is shorter than the specified minimum length is simply ignored; these words will not be in the FTS index nor will they be used if they are given in a search condition. When creating an FTS index via SQL, the default minimum word length is 3.

Maximum Word Length - The maximum word length specifies the maximum word size that can be stored in the FTS index. This is effectively the key

length of the index. In general, you should try to choose a length that is longer than most or all words that are in the information being indexed. The default maximum word length is 30. If a user enters a word with a length greater than that allowed the word will be truncated to the length allowed.

Protect Numbers - This option covers a very specific situation. If it is given and the comma and/or period is given as a delimiter character, then numbers that contain commas and/or periods will not be broken into multiple words on those delimiters. With "normal" text, the default delimiters and conditional drop characters will suffice. Using all default settings, the comma and period are not delimiter characters (they are conditional drop characters). Text such as "1,423.99" would be treated as a single word. If you created an FTS index with the period and comma as delimiter characters, then that text would be broken up into three words "1, 423, and 99". If you use the Protect Numbers option, then this would not occur. This option may be useful, for example, if the text contains words that have only commas between them (with no other delimiters). In that case, it may be desirable to treat the comma as a delimiter.

Maintain Automatically - DocuXplorer can automatically maintain the Index Set data.

In the <Tools/Options/Index Set Search Dialog> the option's default is "Checked". This allows new Cabinets to automatically inherit the "Checked" default. The Drawer object of any new Cabinet is automatically set to "Unchecked" to facilitate the speed of adding documents to Drawers where document content indexing of electronic documents is not required. The administrator will need to set a Drawer's Document Content Search Property to Enable and Maintain Automatically to "Checked" to allow document content to be indexed. To index the full text of an Image document the document must be through the OCR process.

Document Content Search Options

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Set global default Document Content Search Options in the Tools | Options | Document Content Search item of the Desktop menu bar.

Document Content Search enable you to locate documents via their content. Document content is extract via Microsoft's IFilter technology. See [Extract Text to support Full Text Searches](#) for more information on this topic. **To properly search for documents content this feature should always be enabled.** The purpose of the Application Options dialog is to refine the methods by which the Index Search function operates.

Setting application defaults is an Administrator function and can only be changed by users with Administrator permissions.

These defaults affect only new DocuXplorer Drawers. Any Drawers created prior to a change in these defaults will not be affected. [Click here for more information on creating Full Text Search statements](#).

Document Content Search options can be changed for each [Drawer as a property of the objec](#)t.

Tip:

If you set DocuXplorer to enable Document Content Search and maintain the index automatically, the process of adding imported documents will slow to accommodate the content indexing process. If imported documents consist of a few pages the slow down will not be noticeable. You can still enable Full Content Indexing but choose to manually maintain the index. To manually maintain the content index uncheck the item Maintain Automatically but still have the Enable Search Option checked. You can then manually start the content indexing by selecting the [Perform Maintenance](#) menu item from the Drawer right-click Menu.
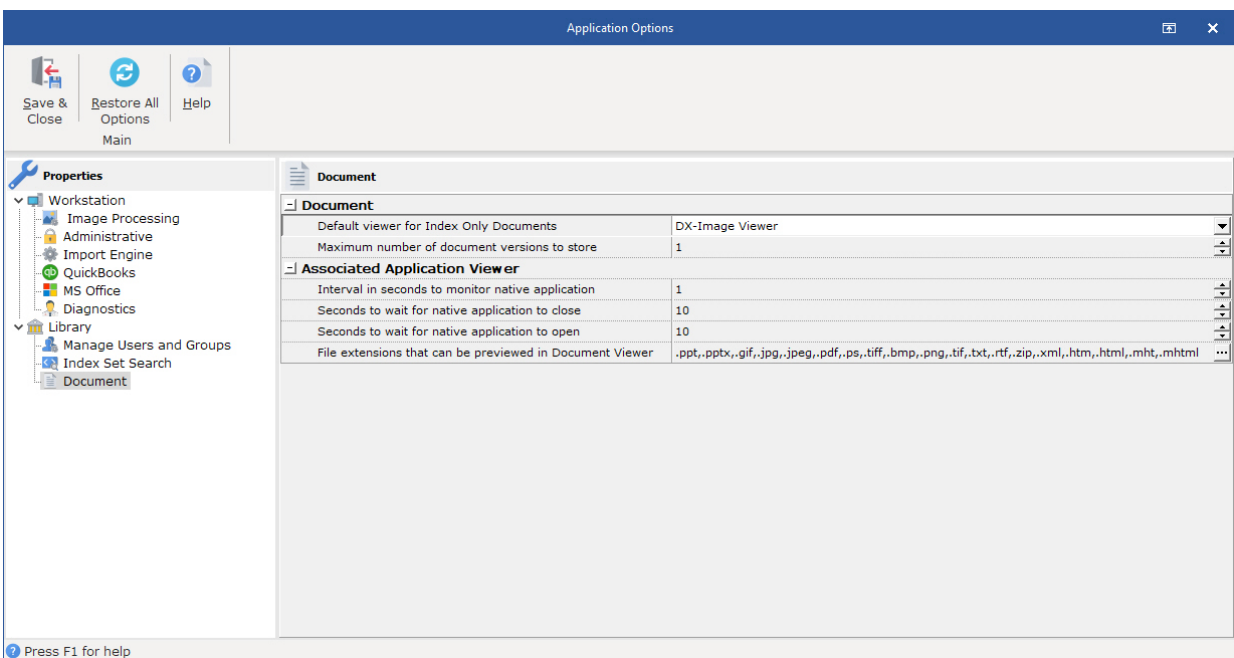
Document Defaults

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Document Defaults can be reached from the desktop menu bar item Tools/Options/Document Defaults item.

Setting application defaults is an Administrator function and can only be changed by users with Administrator permissions.

Except for the Maximum number of Versions to store, defaults set here are local defaults and only affects the specific workstation.

This dialog box allows administrators to set application defaults for new Documents. Defaults that can be set are:

Document

Default viewer for Index Only Documents - The default viewer is the DX-image Viewer. Changing the default document attachment is valuable when users often add attachments to these documents at a later time. Choose the default

viewer based on the type of document most often attached to index Only Documents.

Maximum number of document versions to store - Select the default number of versions of an edited document allowed. The setting is a Library default and will affect all workstations.

Associated Application Name - This is a Read Only option that contains the drive and path of the program that is associated with the document file extension.

This option will show the full path of the application the operating system is using to associate an application with a given file extension.

Tip:

If the application is not the application that should be associated with the file extension, contact the manufacturer of the application that should be associated with the file extension and get directions on how to fix the association.

DocuXplorer does not control the programs that are associated with specific file extensions.

These associations are formed by the applications during their installation.

It is not uncommon for one application to associate itself with a given file extension and then have a second application try to associate itself with the same file extension.

Associated Document Viewer

Seconds to wait for native application to open - enter the number of seconds DocuXplorer will wait for a native application to open. If an application takes more time then is allowed in this setting, DocuXplorer will open the DocuXplorer Document Window with an icon representing the document attachment. This item is defaulted to 0 which is the recommended setting.

Seconds to wait for native application to close - enter the number of seconds DocuXplorer will wait for a native application to close. If an application takes more time then is allowed in this setting, DocuXplorer will close the DocuXplorer Document Window and attempt to save any document modifications. This item is defaulted to 0 which is the recommended setting.

Seconds to wait for Window Handle - enter the number of seconds DocuXplorer will wait to find the document file to be opened. If the file takes more time to open than is allowed in this setting DocuXplorer will open the Document Window with an icon representing the attachment. If you are unable to open the document attachment contact Technical Support at support@DocuXplorer.com with a request for technical support. This item is defaulted to 5 which is the recommended setting.

File Extensions to be added to preview - Allows users to add file extensions for file types that can be opened in the preview pane.

To add a file extension to the list of extensions that can be previewed:

- Highlight the File Extensions that can be previewed item
- Click on the button the right side of the box
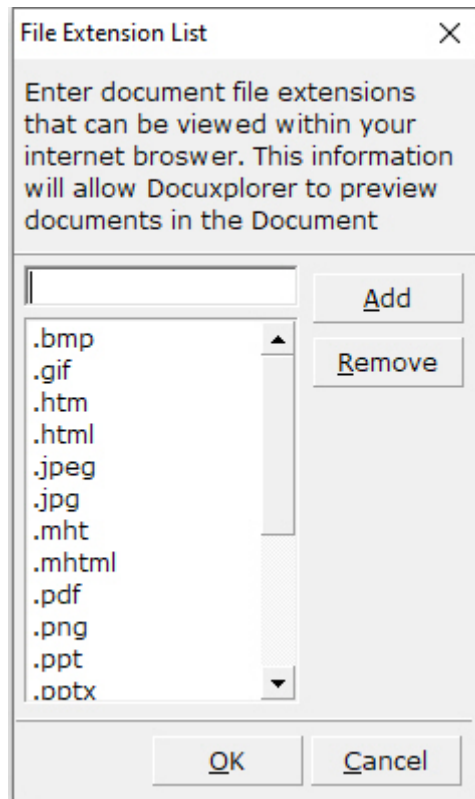
- Type in file extensions to be added
- Click Add to add to list
- Click OK to close

To remove an extension from the list:

- Open the File Extension List as directed above
- Highlight the extension on the list
- Click Remove
- Click OK to close

Tip:

If you are having any trouble previewing a document when adding a single document or when opening the document viewer window that has its file extension listed, remove it from the list and DocuXplorer will open the

document viewer with an icon replacing the preview for that specific file extension. Your document will still be stored with the indexes associated with it and can be viewed or edited with its native program.

About the Library

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Library is a set of databases physically stored on a single machine, be it a local computer or network server. All of a Library's associated Cabinet and Drawers must be stored on storage devices physically connected to that machine. Those storage devices could be hard drives, CD-ROM drives, DVD drives, etc.

Note:

DocuXplorer supports only one Library per installation. Do not create additional Libraries as this may cause the program to malfunction. Any technical support or data repair required when DocuXplorer is misused in this way will require paid Level 3 Technical Support.

The Library in **DocuXplorer** is the highest level of the hierarchical tree. Similar to your physical filing system the hierarchical tree consists of a Library containing Cabinets that contain Drawers, Folders, and Documents.

The Library contains the DX Inbox, Recycle Bin, Templates Folder, Saved Searches Folder, and the Library Work Folder. The DX Inbox, Recycle Bin, Templates Folder, and Work Folder are special objects in DocuXplorer and can not be deleted.

From the Library icon right-click drop-down menu you can:
Create a new Cabinet
Connect Cabinet.
Open Library As
Create/Connect Library...
Close the Library
Perform Maintenance
Library Properties

Tip:

You can use the Library Work Folder as a workgroup mail system to create a workflow:

- Create a sub-folder for each person using the Library Work Folder, leave any document that needs to be edited or reviewed by a member of the workgroup in that member's Library Work sub-folder. When they have completed the task they can pass the document on to the next person in the workflow or file it directly to a Folder in a Cabinet.
- Create a folder for each task in a workflow. As each document task is completed move the document to the next task folder.

Open or Close the Library

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop menu item File:

This command opens or closes the Library.

- ▪ If the Library is open your menu will only display Close Library
- ▪ If you Library is closed your menu will display Open Library.

Closing a Library changes the Desktop's appearance by removing all objects from the Library Tree and changes the menu items to reflect the program's functionality. Opening a Library will repopulate the Library Tree and menus.

Library Event Log

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Small Business

The Library Event Log, available from the Ribbon | Home tab, consists of a list of all documents in a Library and actions taken on the document.

Users must choose to allow document logging from the Desktop Home | Options | Administrative menu. Use the check box to allow document logging.

The Library Event Log is used in administration of a Library. Administrators can check on user and Library activity, create reports on daily work performed by users and more.

Tip:
This feature gives managers valuable insight into such things as document manipulation and worker productivity.

The log displays the following data:
- Subject field data - the index data entry in the subject field
- Event actions
    - Users Logged-in - the date and time a user started DocuXplorer
    - Users Logged-out - the date and time a user exited to DocuXplorer
    - Document Added - the document was added
    - Document Opened - the document was opened
    - Document Closed: Viewed - the document was viewed and then closed
    - Document Closed: Version Added- the document was viewed, modified, a new version was created and the document was closed
    - Document Closed: Image Modified - the document was viewed, modified and saved
    - Document Closed: Index Modified - the document was viewed, the index information modified. You can view new document index data in the Field Values item on the Event Log List View
    - Document Closed: Changes Canceled - the document was viewed, and the image of Index was modified but the changes were not saved
    - Printed - the document was printed. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document E-mailed - the document was e-mailed. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document Deleted - the document was deleted

- Document Version Deleted - a version of the document was deleted from the Show Versions List of the Document List View
- Document Checked Out - the document was checked out for editing by a user. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
- Document Checked In - the document was checked in after an edit is completed by a user
- Find Document - this item will appear when any find document process has been executed. The search SQL statement is displayed in the Field Values item of the Event Log List View
- ..Value Reassigned - an index value has been reassigned to another column.
- Exported to folder & Export to Folder as PDF - the document was exported to a folder on a hard drive. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
- Exported via Email & Export via Email as PDF - the document was exported to another person via email.
- Exported to a printer - the document was printed
- Document Merged - the document was merged with other documents.
- Converted to ... - the document will be converted to a PDF or TIFF as determined by the print driver being used.
- Document Duplicated from… - the document was duplicated from (document name)
- Document Closed: Attachment Deleted - a document associated to an index entry, either an Associated Application Document or Image Document, has been deleted in the Document Window and the index data of the document record still remains
- Extracted Text Updated - this item will appear when a documents extracted text information has been changed.
- Associated Application Document Viewer" Events:
  - Pages Substituted - a document's associated file has been replaced with a different file (for example, the wrong Word file was associated with a set of index data. In the Associated Application Viewer you Import a new file to be associated with the index data.)
  - Pages Appended - pages have been appended to a PDF from the Associated Application Document Viewer
- Image Document Viewer" Events:
  - Pages Added - pages have been added into a TIFF or PDF image document
  - Pages Deleted - pages have been deleted from a TIFF image document
  - Pages Substituted - the entire document was replaced
- Event Date - the time and date of the event

- Field Values - a list of all index values associated with the document
- Creation time and date - the date and time the document was added to the DocuXplorer database
- Event operator - the name of the user who performed the event action
- *Hidden* - Document ID number - the document unique ID number created as a DocuXplorer default
- *Hidden* - Database location ID number - the unique ID number for the Cabinet

File Section
- Open SQL Query - Enables a user to run a custom SQL query to generate a custom view
- Save SQL Query - Saves the current SQL query generating the view to a file
- Export Display - Allows users to export the Active User List to a folder in any of the following file types: xls, html, xml, csv
- Print Display - Allows user to print the user list.

Edit Section
- Select All (Grid Items) - Allows a user to select records from the display to be used for export
    - To select a single row of data click the row.
    - To select multiple continuous rows click the first row and while holding down the <Shift> key click the last row to be selected.
    - To select non-continuous rows click any row to be added to the selection while holding down the <Ctrl> key.

View Section
- Advance Filter Panel - Select Advanced Filter to view and customize filter for your data display. If you select <Customize> a dialog box will open allowing customization of the criteria.=
- Refresh Rate - The refresh rate defines the number of seconds in a refresh interval to updated the list of active users.

Help Section
- Help Topics - Display the help system.
- Help Context - Display the help above.

Tip:
- The Subject Field is populated by the documents user defined [Export File Name](#).
- Hidden fields can be added to the display by right clicking on the column header bar and selecting Add Fields and dragging and dropping the item up to the column header bar.

Creating a Library

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

A Library in DocuXplorer is a physical folder on a hard drive storing the database files related to it

DocuXplorer will by default create a subfolder of the DXDOCS folder called DXLIBRARY to store all the Library, Cabinet and Drawer database files.

Click the link below that corresponds to your edition

DocuXplorer Personal

DocuXplorer Professional

DocuXplorer Enterprise

DocuXplorer Small Business

Note:

DocuXplorer supports only one Library per installation. Do not create additional Libraries as this may cause the program to malfunction. Any technical support or data repair required when DocuXplorer is misused in this way will require paid Level 3 Technical Support.

Connect to a Library

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

A Library in DocuXplorer is a physical folder on a hard drive storing the database files related to it.

If you used the DocuXplorer default then your Library was created as a subfolder of the DXDOCS folder called DXLIBRARY. In the event that your library is in a different location, it can be specified in the ADSINI_path. The current location of ADS.INI can be found in the Create/Connect to Library dialog.

Connecting to a Library will differ depending on the edition you are using.

Click the link below that corresponds to your edition

DocuXplorer Personal

DocuXplorer Professional

DocuXplorer Enterprise

DocuXplorer Small Business

Note:

DocuXplorer supports only one Library per installation. Do not create additional Libraries as this may cause the program to malfunction. Any technical support or data repair required when DocuXplorer is misused in this way will require paid Level 3 Technical Support.
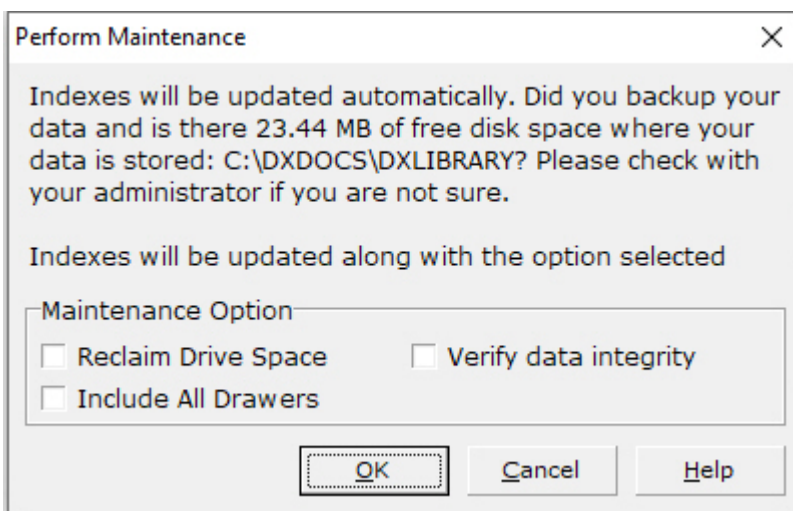
Moving the Library

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

Follow these instructions when you need to move a Library and all it contains to a new location on a network or local hard drive.

Note:

Only DocuXplorer Enterprise and Small Business, the multi-user editions, allows DocuXplorer data to exist on a drive not physically attached to a workstation running DocuXplorer

To move the Library and default data directory to a new server with Enterprise or Small Business:

- Close down DocuXplorer on all users workstations
- Uninstall the Sybase Advantage Database
- Remove the Share from the existing DXDOCS folder
- Select the drive you want as the new Library location and copy the DXDOCS folder and all its subfolders including the DXLIBRARY
- Create a new Share and set security. Make sure you have full access to the \DXDOCS folder through a Network Share with full permissions for all users. When creating the network Share, click the Permissions button and give Everyone Full Control then click Apply. Next, click the Security button and make sure the Administrator and System accounts have full control rights.
- On the new server run the install in the DXDOCS/DXInstall Folder and install the database
- At each workstation reset the Mapped Drive setting to point to the new Share
- Open DocuXplorer
- From the Library Connection dialog box select Connect to Library
- Click on Properties and change the Connection Path setting to the correct location for the DocuXplorer Data Files

Enterprise and Small Business users note:

When a Library is moved to a new server the Server Software must be installed to the new server.

The Server Software can not be installed to two servers at the same time - you will need to uninstall the Server Software from its original location and use the DocuXplorer Install to reinstall the Server Software to the new location.

Professional and Personal users note:

The Library must be relocated on a drive attached to the computer running DocuXplorer.

Note:

DocuXplorer supports only one Library per installation. Do not create additional Libraries as this may cause the program to malfunction. Any technical support or data repair required when DocuXplorer is misused in this way will require paid Level 3 Technical Support.

Perform Maintenance

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑Small Business

This administrator feature is found on the right-click menu of the DocuXplorer object (Library, Cabinet or Drawer). By default Perform Maintenance will rebuild indexes for all database tables associated for the select object.

DocuXplorer also allows you to reclaim space on the hard drive that has been allocated to the DocuXplorer database and is no longer being used. This feature will be most valuable in reclaiming space allocated to the Recycle Bin. After the Recycle Bin is emptied of a large number of deleted documents the Library might be reserving more space than is actually needed to store its data. Use this feature to reclaim that space on your hard drive for use by other programs.

Selecting "Validate data integrity" will check the integrity of workflows, documents and security.

If you are getting an error with workflow tasks that the a taskid or workfow id already exists, it may be due to orphaned task records. Validate data integrity will also delete orphaned workflow tasks that are not accessible in the task list. These records are usually orphaned by a workflow design that did not have a properly managed error handler, and the workflow stopped due to an error.

You may also reclaim space from Cabinets and Drawers although any allocated space in these objects are made available to new documents after documents are deleted.

Please note that if any damaged documents are found a warning message is displayed. Once the dialog message is acknowledged the process will continue with the next file in its list

The "Include All Drawers" option is only visible when a Cabinet is selected. This feature will process all drawers in addition to the cabinet tables. Use the "Perform Maintenance" on individual drawers if only one drawer needs to be processed.

When the Cabinet or Drawer property "Index Set Search" or "Document Content Search" are not being maintained Perform Maintenance will rebuild these indexes at the same time.

Tip:

This function is only available to administrators and must be run from the server when using the Enterprise or Small Business version.

If errors are found a dialog will provided directions to locate the problem documents. The dialog will also indicate the name of the backup file created of your original data. Support@DocuXplorer.com should be contacted for assistance or restore your DXLibrary folder files from your backup process.

If a document from the drawer is open for the current session, the option will be grayed out and unavailable.

To reclaim hard space a user must have sole access to the object being compressed. In Enterprise check the Active User List found under the Tools menu to make sure you are the only user logged in to the program.

If you use the default setting for Full Text Indexing (the default is recommended for increased speed) you should periodically use the Perform Maintenance function to allow DocuXplorer to rebuild the indexes to include any changes made to a document's index information.

Library Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To view or change Library properties:
- Highlight the Library icon on the Library Tree
- Right click and select Properties on the drop-down menu

The Library Properties dialog contains items allowing users to edit the Library Properties.

General Properties

The General item fields contain information about the Library. None of these fields are editable with the exception of the Library Description Field that you can modify for memo information about your Library.

Folder ID - this item is the unique ID number given to this object. This item cannot be edited and is used by tech support to determine object identification

Permission ID - this item is the ID number given to the permission set for the object

Database ID - this item is the unique ID number given to the database storing this object. This item cannot be edited and is used by tech support to determine database and object identification

Connection Path - this item provides information on the location and connection path for this object. This item cannot be edited and is used by tech support to determine database and object identification

Accessed - the date and time this object was last accessed

Modified - the date and time this object was modified

Created - the date and time this object was created

Document Count - the number of documents contain in this object

Description - an editable field that can be used to provide a description of what is contained in this object or any other memo information you might want to attach to this object

Library

The Library item allows you to set the object to monitor its size, set its maximum size and Recycle Bin properties. These properties pertain to the Library, Recycle Bin and Work Folder objects and are inherited by new Cabinets, Drawers and Folders created.
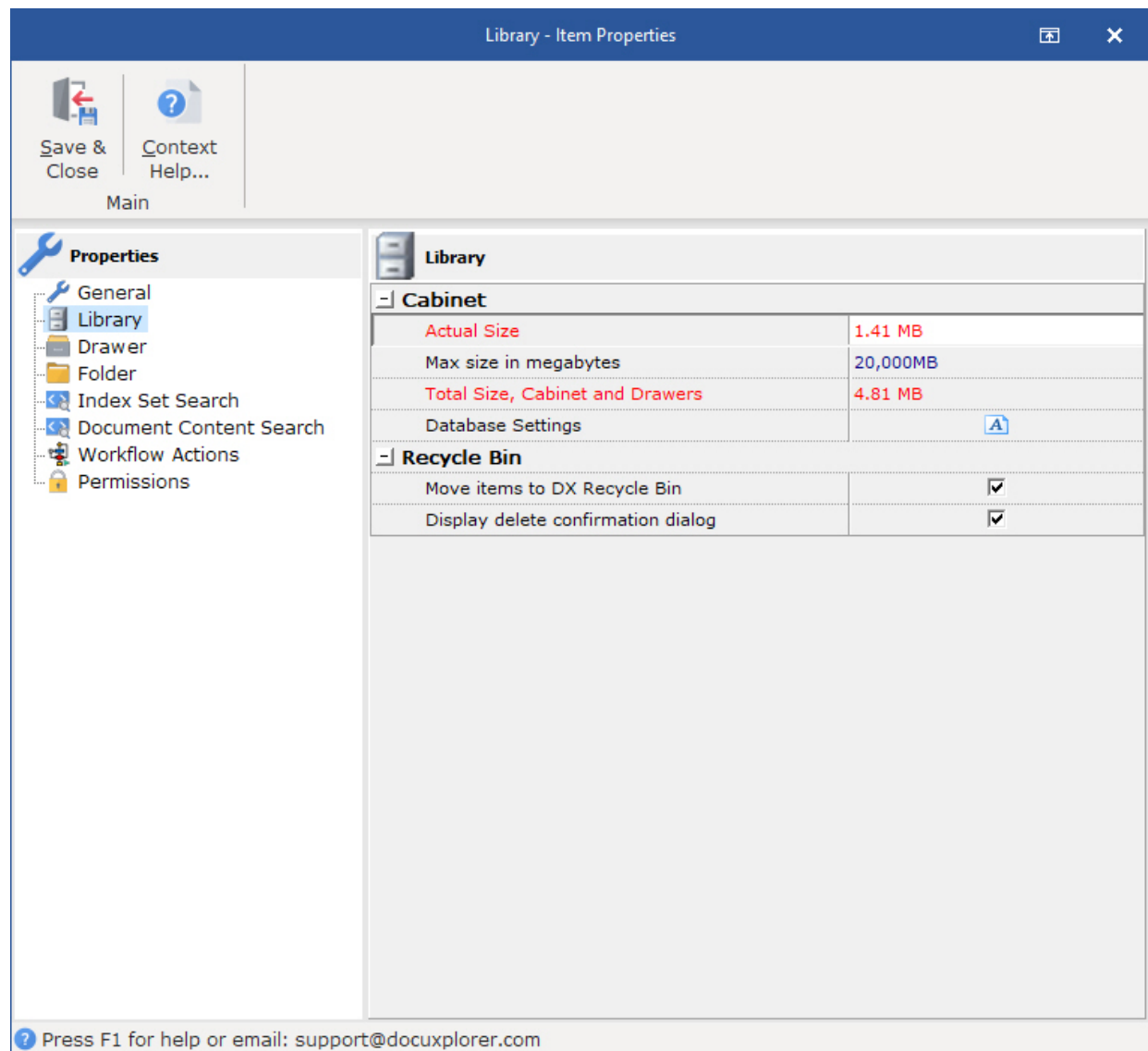
Library

Used to set the maximum aggregate size of the Library. The aggregate size would include all files that are part of the Library - the Library tables that contain pointers to Cabinets and Drawers, Index Set tables and the Library Drawer tables that store the documents in the Library Documents Folders.

Setting a maximum aggregate size provides an alarm dialog to warn when the maximum object size has been reached

Monitor Size - check to have DocuXplorer monitor the size of the object

Max size in megabytes - A user can change the maximum size of a Drawer by changing the size being monitored in this field. The image above shows a Drawer of 4000 MB or 4 GB. The maximum size of a Cabinet or Drawer that can be entered is 30 GB represented by 30000 MB. The minimum size that can be entered is 500 MB. The initial default size is 10 GB. A Cabinet or Drawer can be expanded to as much as 14 terabytes with Level 2 Support. [Click here to see more information about operating system limitations.](#)

Actual size - the actual size of the database table

The ability to monitor database size is unavailable when accessing the DocuXplorer data from a remote location via the Internet.

Database Settings

should only be used when instructed by an DX engineer. This information is used to adjust performance information for indexes, block size, page size and database format version information.

version=#.##

ximagepagesize=512,1024,2048,4096, 8192

xindexpagesize=

Recycle Bin

Move items to Recycle Bin - check to send deleted items to the recycle bin. If left unchecked items will be deleted without going to the Recycle Bin. The Recycle Bin gives users the opportunity to recover deleted items. The default setting sends documents to the Recycle Bin.

Display deletion confirmation dialog - if checked, a dialog box will display asking users to confirm any deletion request. The default is to display confirmation.

Tip:

It is recommended that at least one of the boxes be checked.

Drawer

The Drawer item allows you to set the maximum size of the image database that is the Work Folder object in the Library and are inherited by new Cabinets, Drawers and Folders created.
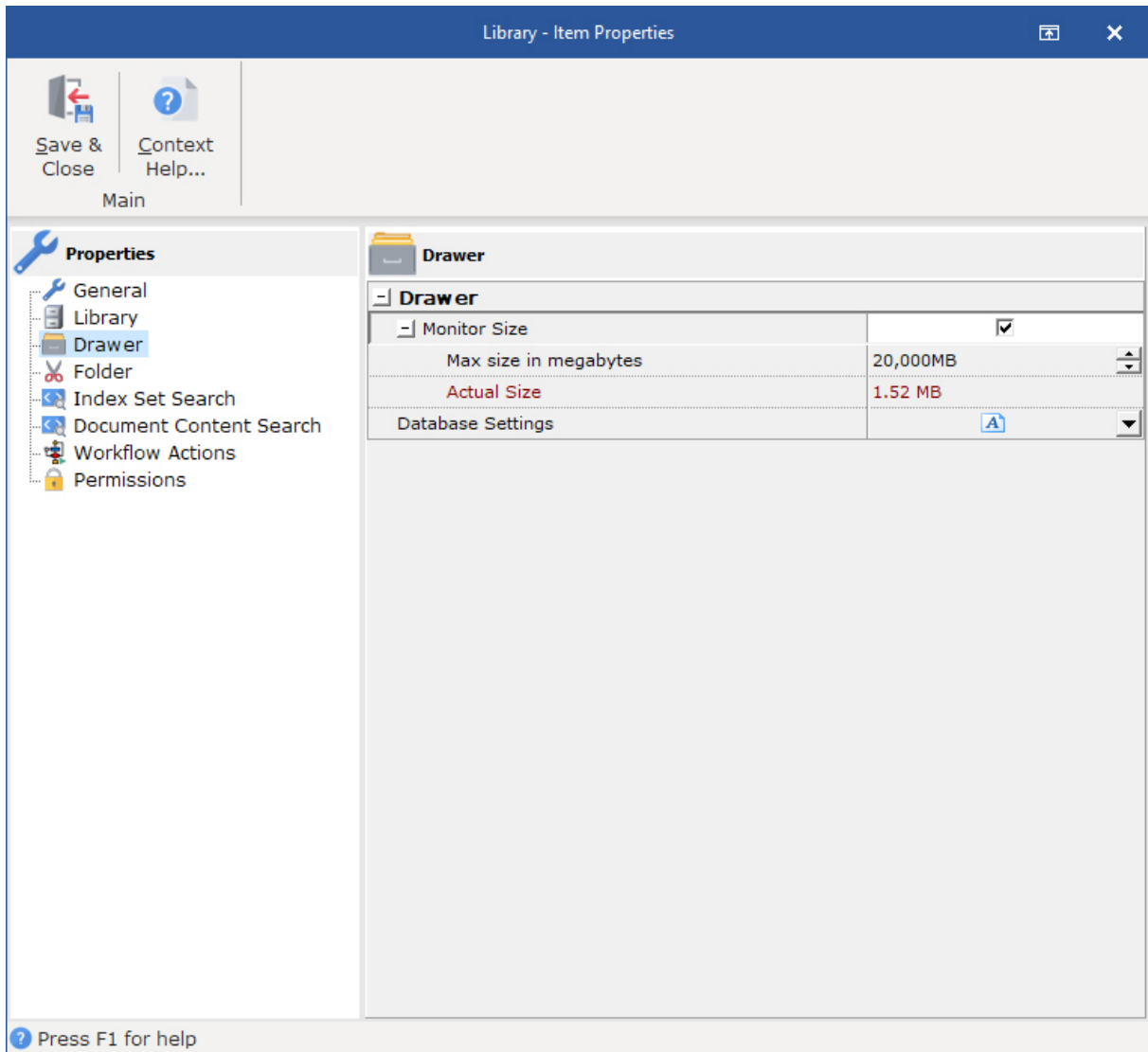
Setting a maximum aggregate size provides an alarm dialog to warn when the maximum object size has been reached by checking the box next to Monitor Size.

Database

Monitor Size - check to have DocuXplorer monitor the size of the object

Max size in megabytes - set the maximum size for the database table

Actual size - the actual size of the database table

The ability to monitor database size is unavailable when accessing the DocuXplorer data from a remote location via the Internet.

Folder

The Folder item allows you to set the default Index Set for new folders created in this object and are inherited by new Cabinets, Drawers and Folders created.
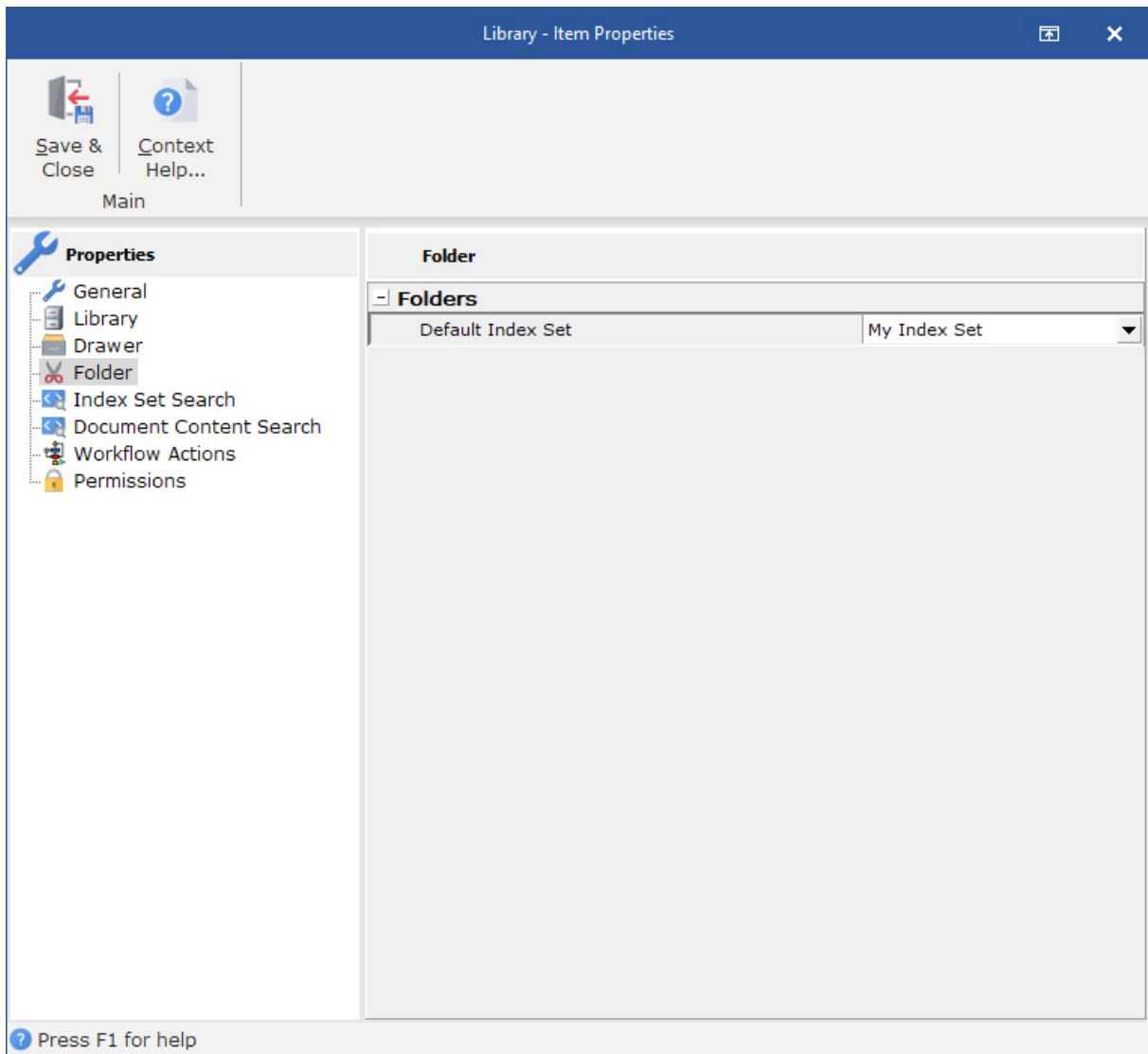
Select the default Index Set from the drop down list and click Save and Close

Index Set Search

Index Set Search options can be changed for each Cabinet as a property of the object. Index Set Searches are searches through data that has been input by users into an Index Set field.
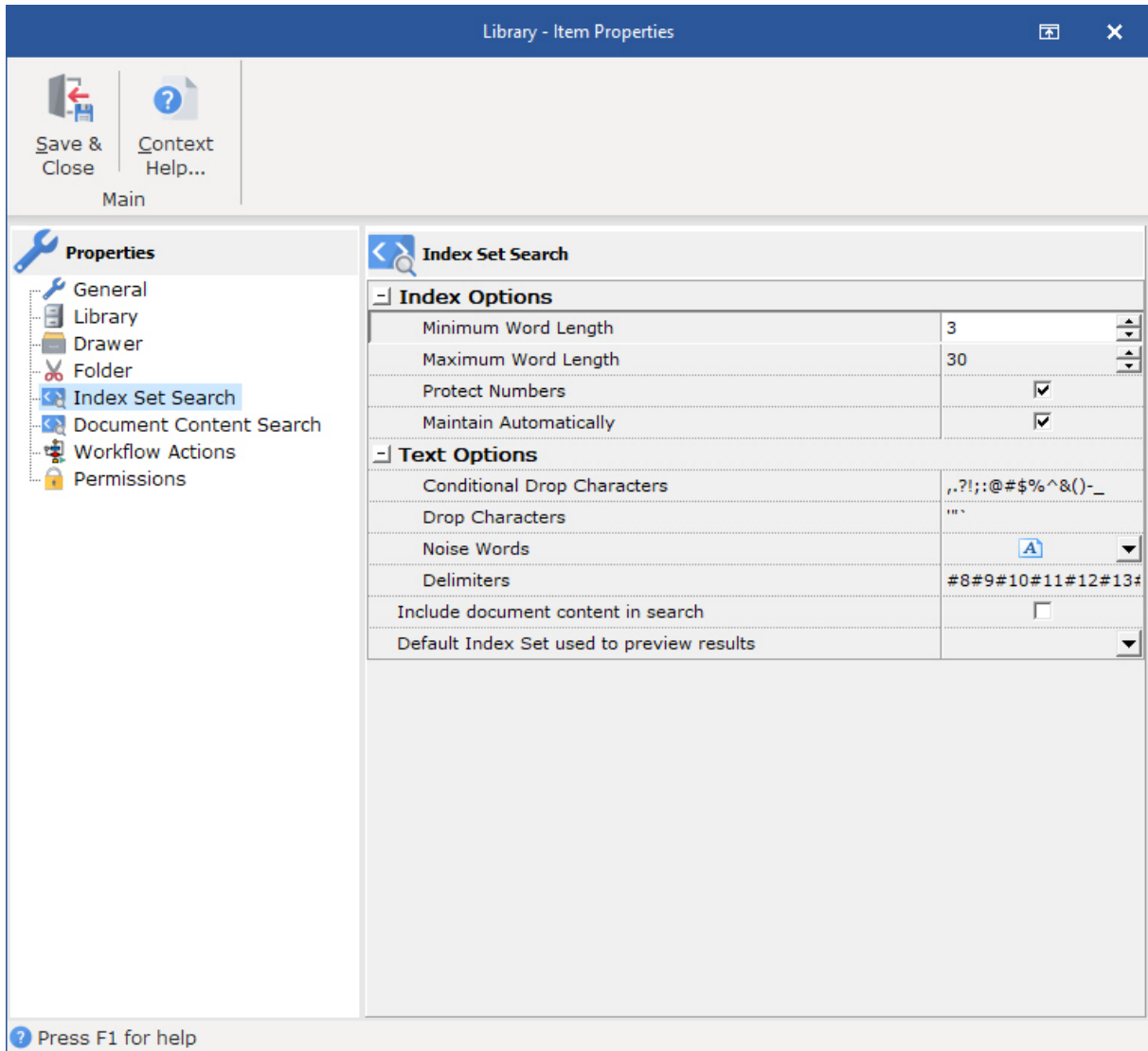
Check "Enable Search Options" to enable and set default properties for Index Field searches

Default settings are as follows;

Conditional Drop Characters - Conditional drop characters are a special type of drop character. These characters are dropped only if they are at the beginning or the end of a word. This provides a mechanism for allowing certain characters to be maintained if they appear inside words. The default conditional drop characters are (,.?!;:@#$%^&()-_).

    For example:

One of the default conditional characters is the period. This means that periods on the ends of words will be stripped from the text, but if they are in the middle of a word (e.g., in a number such as 48.5), then they will be maintained.

Drop Characters - Drop characters are a set of characters that are simply ignored by the FTS engine. Drop characters are ignored in both the text and in search strings. The default drop characters are the double quote, the single quote, and the back quote. Administrators can add additional Drop Characters in the Drop Characters/Additional field.

For example:

If the defaults are used and a name such as O'Malley is in the text, the FTS engine will store OMalley (without the quote) as the key value. A search word of either OMalley or O'Malley will find it because the quote would be stripped out of the search word too.

Noise Words - The noise words are words that are ignored by the FTS engine. Once a word is recognized according to the other rules (after obeying delimiters, drop characters, minimum word length, etc.), the word is checked against the noise word list and is ignored if it is found in that list.

The default noise word list includes the following words:

about after all also and another any are because been before being between both but came can come could did does each else for from get got had has have her here him himself his how into its just like make many might more most much must never now only other our out over said same see should since some still such take than that the their them then there these they this those through too under use very want was way well were what when where which while who will with would you your

Delimiters - Delimiters are the set of characters that define word boundaries. The default set of delimiters includes the white space characters, which are the space (0x20), backspace (0x08), tab (0x09), newline (0x0A), vertical tab (0x0B), form feed (0x0C), and carriage return (0x0D). This works for most standard text documents. WordPerfect documents are an example of documents that use delimiters to define boundaries. DocuXplorer has been programmed with the Symbol (highbit) character € that WordPerfect uses to define its boundaries.

Delimiters are always case sensitive. If, for example, you want to use "x" (0x78) and "X" (0x58) as delimiters, then you must specify both characters as delimiters regardless of the case sensitivity option.

Index Options

Minimum Word Length - This option specifies a minimum cut-off point for word recognition. Any word that is shorter than the specified minimum length is simply ignored; these words will not be in the FTS index nor will they be used if they are given in a search condition. When creating an FTS index via SQL, the default minimum word length is 3.

Maximum Word Length - The maximum word length specifies the maximum word size that can be stored in the FTS index. This is effectively the key length of the index. In general, you should try to choose a length that is longer than most or all words that are in the information being indexed. The default maximum word length is 30.

Protect Numbers - This option covers a very specific situation. If it is given and the comma and/or period is given as a delimiter character, then numbers that contain commas and/or periods will not be broken into multiple words on those delimiters. With "normal" text, the default delimiters and conditional drop characters will suffice. Using all default settings, the comma and period are not delimiter characters (they are conditional drop characters). Text such as "1,423.99" would be treated as a single word. If you created an FTS index with the period and comma as delimiter characters, then that text would be broken up into three words "1, 423, and 99". If you use the Protect Numbers option, then this would not occur. This option may be useful, for example, if the text contains words that have only commas between them (with no other delimiters). In that case, it may be desirable to treat the comma as a delimiter.

Maintain Automatically - DocuXplorer can automatically maintain the full text of a document's content. If you set DocuXplorer to maintain the FTS index automatically the process of adding imported documents will slow to accommodate the content indexing process. If imported documents consist of a few pages the slow down will not be noticeable.

In the <Tools/Options/Index Set Search dialog> the option's default is set to "On". This allows new Cabinets to automatically inherit the "On" default.

Document Content Search

Document Content Search Options can be changed for each Drawer as a property of the object. Document Content Searches are searches through the full text of an electronic documents content. Document Content Searches must be enabled at the Drawer object and can be maintained automatically. By default this option is not enabled.
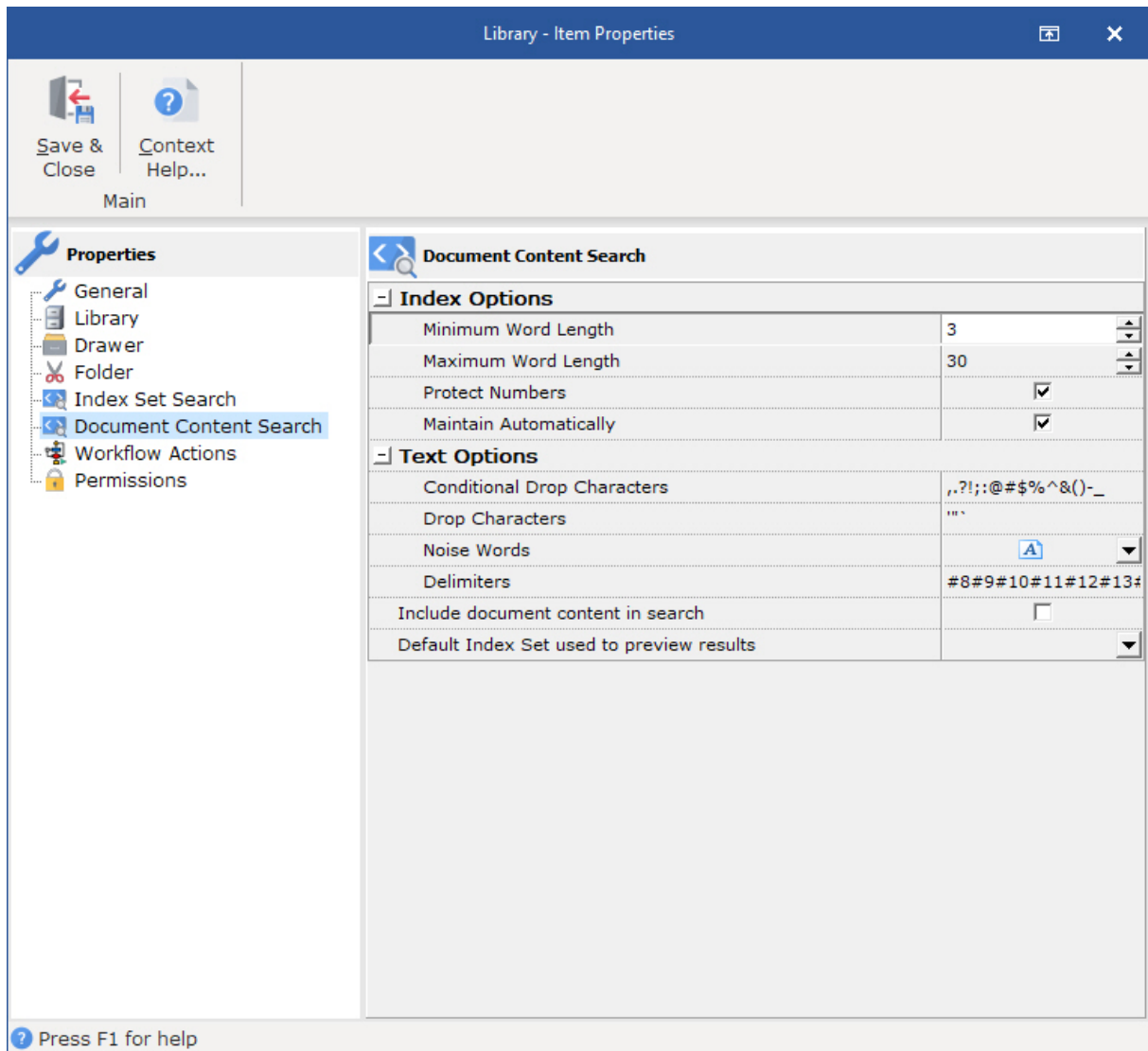
Check "Enable Search Options" to enable and set default properties for Document Content searches

Default settings are as follows;

Conditional Drop Characters - Conditional drop characters are a special type of drop character. These characters are dropped only if they are at the beginning or the end of a word. This provides a mechanism for allowing certain characters to be maintained if they appear inside words. The default conditional drop characters are (,.?!;:@#$%^&()-_).

    For example:

One of the default conditional characters is the period. This means that periods on the ends of words will be stripped from the text, but if they are in the middle of a word (e.g., in a number such as 48.5), then they will be maintained.

Drop Characters - Drop characters are a set of characters that are simply ignored by the FTS engine. Drop characters are ignored in both the text and in search strings. The default drop characters are the double quote, the single quote, and the back quote. Administrators can add additional Drop Characters in the Drop Characters/Additional field.

For example:

If the defaults are used and a name such as O'Malley is in the text, the FTS engine will store OMalley (without the quote) as the key value. A search word of either OMalley or O'Malley will find it because the quote would be stripped out of the search word too.

Noise Words - The noise words are words that are ignored by the FTS engine. Once a word is recognized according to the other rules (after obeying delimiters, drop characters, minimum word length, etc.), the word is checked against the noise word list and is ignored if it is found in that list.

The default noise word list includes the following words:

about after all also and another any are because been before being between both but came can come could did does each else for from get got had has have her here him himself his how into its just like make many might more most much must never now only other our out over said same see should since some still such take than that the their them then there these they this those through too under use very want was way well were what when where which while who will with would you your

Delimiters - Delimiters are the set of characters that define word boundaries. The default set of delimiters includes the white space characters, which are the space (0x20), backspace (0x08), tab (0x09), newline (0x0A), vertical tab (0x0B), form feed (0x0C), and carriage return (0x0D). This works for most standard text documents. WordPerfect documents are an example of documents that use delimiters to define boundaries. DocuXplorer has been programmed with the Symbol (highbit) character € that WordPerfect uses to define its boundaries.

Delimiters are always case sensitive. If, for example, you want to use "x" (0x78) and "X" (0x58) as delimiters, then you must specify both characters as delimiters regardless of the case sensitivity option.

Index Options

Minimum Word Length - This option specifies a minimum cut-off point for word recognition. Any word that is shorter than the specified minimum length is simply ignored; these words will not be in the FTS index nor will they be used if they are given in a search condition. When creating an FTS index via SQL, the default minimum word length is 3.

Maximum Word Length - The maximum word length specifies the maximum word size that can be stored in the FTS index. This is effectively the key length of the index. In general, you should try to choose a length that is longer than most or all words that are in the information being indexed. The default maximum word length is 30.

Protect Numbers - This option covers a very specific situation. If it is given and the comma and/or period is given as a delimiter character, then numbers that contain commas and/or periods will not be broken into multiple words on those delimiters. With "normal" text, the default delimiters and conditional drop characters will suffice. Using all default settings, the comma and period are not delimiter characters (they are conditional drop characters). Text such as "1,423.99" would be treated as a single word. If you created an FTS index with the period and comma as delimiter characters, then that text would be broken up into three words "1, 423, and 99". If you use the Protect Numbers option, then this would not occur. This option may be useful, for example, if the text contains words that have only commas between them (with no other delimiters). In that case, it may be desirable to treat the comma as a delimiter.

Maintain Automatically - DocuXplorer can automatically maintain the full text of a document's content. If you set DocuXplorer to maintain the FTS index automatically the process of adding imported documents will slow to accommodate the content indexing process. If imported documents consist of a few pages the slow down will not be noticeable.

In the <Tools/Options/Index Set Search dialog> the option's default is set to "On". This allows new Cabinets to automatically inherit the "On" default. The Drawer object of any new Cabinet is automatically set to "Off" to facilitate the speed of adding documents to Drawers where full text indexing of electronic documents is not required. The administrator will need to set a Drawer's Document Content Search Property to "Enabled" to allow document content to be indexed.

To index the full text of an Image document, you must put the document through the OCR process.

Permissions - this item is not available in DocuXplorer Personal or Small Business

The permissions item allows an administrator to set User and Groups Permissions for the Library. All permissions will be inherited by all objects below

the Library until inheritance is turned off at the object where permissions are to be changed.

click the Permissions link above to see complete information on permissions and security.

DX Inbox

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

The DX Inbox is used to add documents to DocuXplorer folders. Located on the Library Tree of the DocuXplorer Desktop, The DX Inbox is a window to any folder on a shared network or local drive. Using the DX Inbox a document (file) or multiple documents (files) can be selected from a hard drive folder and dragged and dropped into a DocuXplorer folder for indexing and storage. Use the DX Inbox for easy access to files created by Network Scanners that scan documents and leaves them in a pre-selected folder or to files created in any program that you have saved to a hard drive.

Tip:

The DX Inbox can automatically remove imported files from their originating hard drive folders after import by setting the "Send original files of documents imported to DocuXplorer to the Recycle Bin" Option in the Home | Options | Workstation menu. When set, the duplicate document remaining on the hard drive is sent to the operating system's Recycling Bin after it has been added to the DocuXplorer database. This feature is available only when importing documents from a local hard drive.
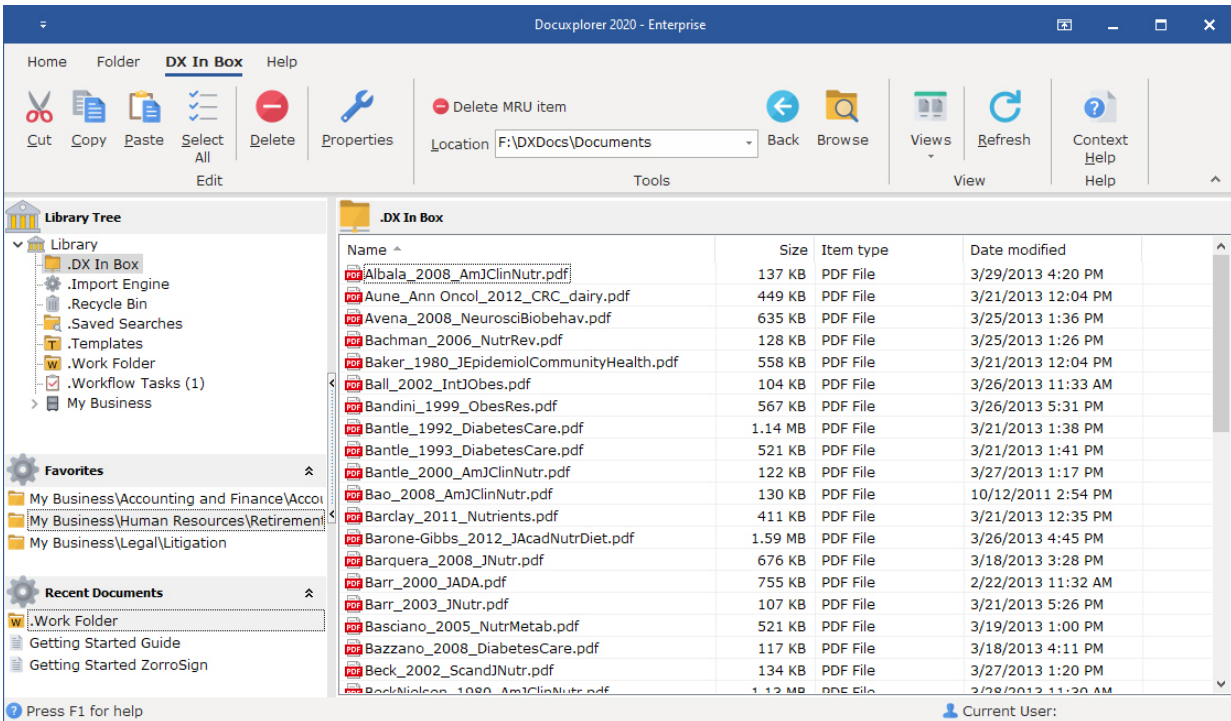
On the Ribbon

- **Cut** - Places the select item in the windows clipboard to be moved to another location

- **Copy** - Places the select item in the windows clipboard to be copied to another location

- **Paste** - Places the copied or cut item in the clipboard to be move or copied to the selected location

- **Delete** - Delete the select file from the hard drive

- **Properties** - Show the Windows property dialog for the selected file

- **Browse** - Allow the user to select a file location (Local or network) to be shown in DX interface

- **Location** - Displays the location select from the Browse function or allows the user to enter in the file location manually, A drop down list of previously select location is maintained for quick access.

- **Delete MRU Items** - Allow the user to remove previously selected locations from the locations drop down list.

- **Back** - Allows the user to navigates up the path hyicy

- **Refresh F5** – Refresh the current window after an operation to ensure the results of the operation are repainted onto the window.

- **Window** - Displays a list of open documents

- – Show various types of status information at the bottom of the DocuXplorer window.

- Context Help - shows the help information for context of the select area of the screen

In the DX Inbox right clicking on a file in a folder will bring up a menu with many of the functions available on your computer in Windows Explorer.
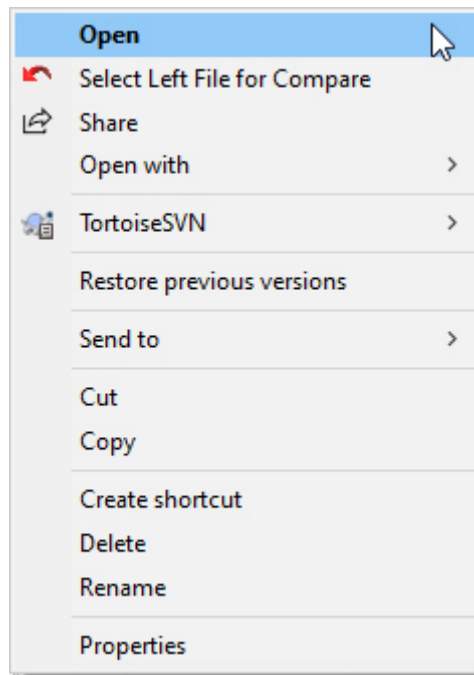
The configuration of the right-click your computer will depend on programs you have installed that place themselves on the Windows Explorer right-click menu.

Tip:

While you can select multiple documents to be imported to DocuXplorer you can perform these right-click menu functions only on a single file - if you have selected multiple files only the first file will be affected.

DX Inbox Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The. DX Inbox General Properties displays the date and time of creation,when last accessed or modified. The Inbox Properties also includes an editable Description field.

General Properties

Folder ID - this item is the unique ID number given to this object. This item cannot be edited and is used by tech support to determine object identification

Accessed - the date and time this object was last accessed

Modified - the date and time this object was modified

Created - the date and time this object was created

Description - an editable field that can be used to provide a description of what is contained in this object or any other memo information you might want to attach to this object.

The .DX Inbox Permissions Properties is the place to specify who can see the Inbox and who can modify its permissions.
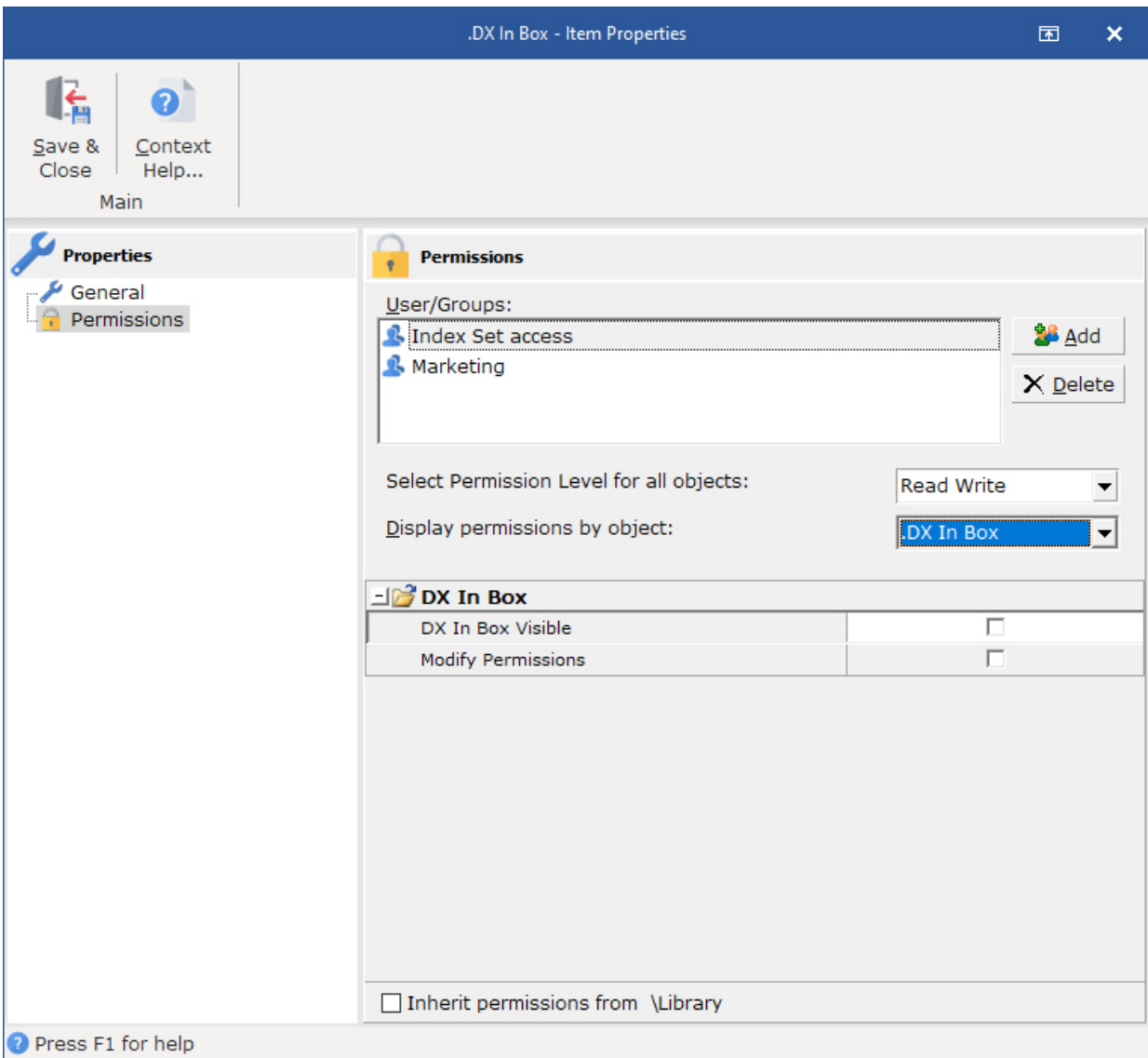
Permissions allow you to create sets of security properties for a DocuXplorer object.

Tip:

Permissions are generally inherited from the Library. To change permissions for the In Box object you must uncheck the Inherit permissions from Library box before setting new permissions for users or groups.

![DOCUXPLORER]

The Templates Folder

About the Templates Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Templates Folder is used to store documents to be used as templates such as forms or boiler plate documents like contracts or leases. A user can then create new documents from one of these templates in a DocuXplorer folder. The original template documents will not be changed but a new document with specifics that have been entered will be created in the new location.
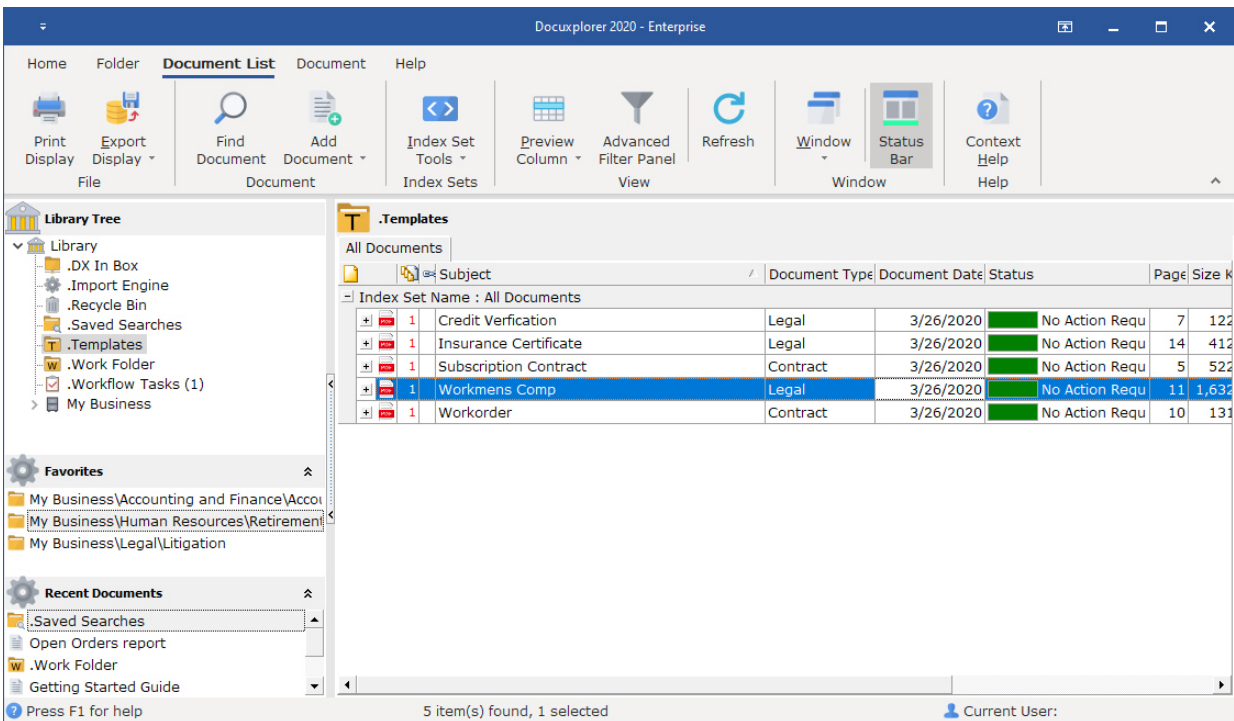
Add documents to the Templates Folder in the same manner you would add documents to any folder in DocuXplorer. These documents are then stored and made available on the Add Documents Menu for any folder in the DocuXplorer Library.

Import Engine Folder Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional
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From the DocuXplorer Desktop:

To view or change the Import Engine properties:
- Highlight the Import Engine icon on the Library Tree
- Right click and select Properties on the right-click menu

The Import Engine is a optional feature in DocuXplorer and will not display if the option has not been purchased.

General Properties provides you with information that identifies the object
selected. Identification is based on GUID serial numbers (long strings of numbers
and letters that are unique to the object). The only editable field on this screen is
the object description field.

General Properties

- Folder ID - this item is the unique ID number given to this folder. This
  item cannot be edited and is used by tech support to determine folder
  identification
- Permission ID - this item is the unique ID number given to the permission
  set for this folder. This item cannot be edited and is used by tech support
  to determine database and folder identification
- Access - the date and time this folder was last accessed

- Modified - the date and time this folder was modified
- Create - the date and time this folder was created
- Description - an editable field that can be used to provide a description of what is contained in this folder or any other memo information you might want to attach to this folder

Permissions allow you to create sets of security properties for access to ability to modify Import Engine Jobs

Permission Properties

- Import Engine Visible - allows an administrator to turn off Import Engine visibility based on a user login.

- Modify Permission Properties - allows an administrator to assign permission to modify permission for the Import Engine based on user login.

The Recycle Bin

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer stores deleted documents in the DocuXplorer Recycle Bin, located on the tree in the Library Window . Use the DocuXplorer Recycle Bin object to retrieve documents deleted in error. Or empty the DocuXplorer Recycle Bin when you are sure those documents are no longer needed. After deleting documents the Recycle Bin refreshes when the program closes and reopens or you can press F5 to refresh the Recycle Bin display.

When documents are deleted to the DocuXplorer Recycle Bin the space taken up by those documents on a hard drive is not automatically reclaimed. The space is reclaimed when new documents are added or the Reclaim Hard Drive Space function is used.

The DocuXplorer Recycle Bin is a special object in DocuXplorer and can not be deleted from the Library.

The DocuXplorer Recycle Bin is not related to Windows operating system Recycle Bin and is specifically meant to handle only document delete from DocuXplorer.
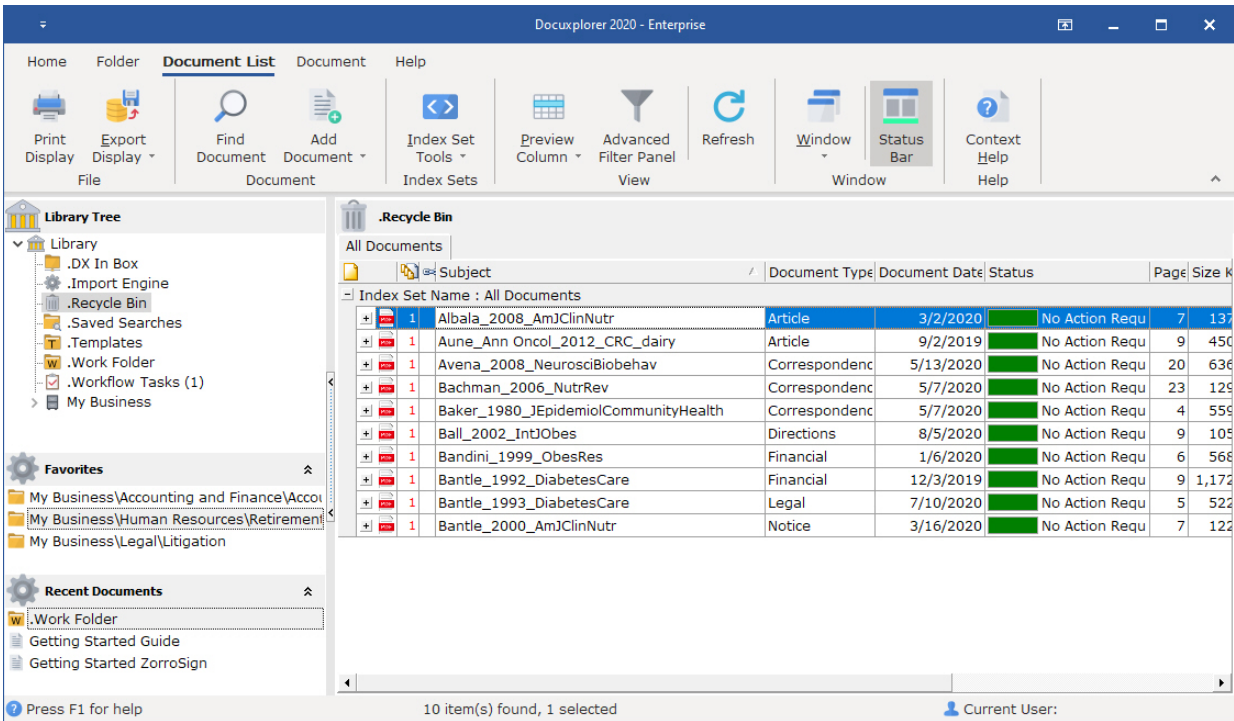
On the Ribbon

- Print Display - Prints the display of the import jobs grid.
- Export Display - Exports the display of the import jobs grid in xls,xlm,htm and csv.
- Find Document -
- Add Document -
- Index Set Tools -
- Preview Column -
- Advanced Filter Panel -
- Refresh - This enable the user to updates the display manually should other users should be making changes at the time
- Window -
- Status Bar -
- Context Help - Displays this page in the help

Tip:

Periodic maintenance of the DocuXplorer Recycle Bin, Cabinets and Drawers should include running <u>Perform Maintenance</u> with Reclaim Hard Drive Space function to assure maximum system performance.

Recycle Bin Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Accessible from the DocuXplorer Desktop/Recycle Bin icon right-click menu item Properties:

To view or change Recycle Bin properties:
- ▪ Highlight the Recycle Bin icon on the Library Tree
- ▪ Click on Properties on the Icon Toolbar

The Recycle Bin Properties dialog contains two items; it is where users can edit available Recycle Bin Properties.

General

The General Properties fields contain information about the Recycle Bin. None of these fields are editable with the exception of the Recycle Bin Description Field that you can modify for memo information about a Recycle Bin.

General Properties

- Folder ID - this item is the unique ID number given to this object. This item can not be edited and is used by tech support to determine object identification
- Permission ID - this item is the ID number given to the permission set for the object
- Database ID - this item is the unique ID number given to the database storing this object. This item cannot be edited and is used by tech support to determine database and object identification
- Connection Path - this item provides information on the location and connection path for this object. This item can not be edited and is used by tech support to determine database and object identification

- Access - the date and time this object was last accessed
- Modified - the date and time this object was modified
- Create - the date and time this object was created
- Document Count - the number of documents contain in this object
- Description - an editable field that can be used to provide a description of what is contained in this object or any other memo information you might want to attach to this object

Recycle Bin Properties

The Recycle Bin Properties dialog box allows you set a default index set.
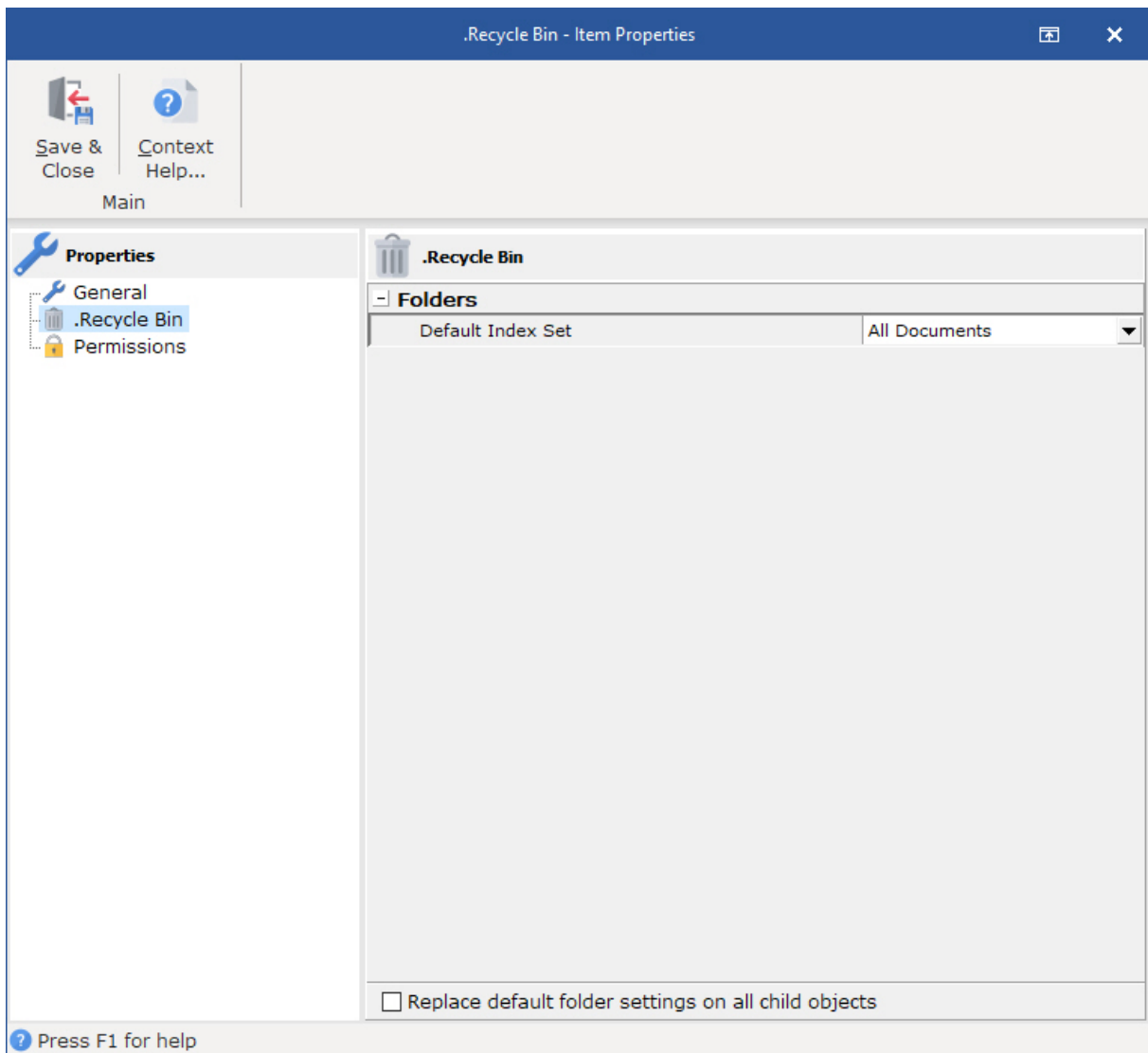
Folder

Default Index Set - The Folder's Default Index Set can be selected from the drop list.

Recycle Bin Permissions

The Recycle Bin Permissions dialog box allows an administrator to set security permissions for the Recycle Bin.
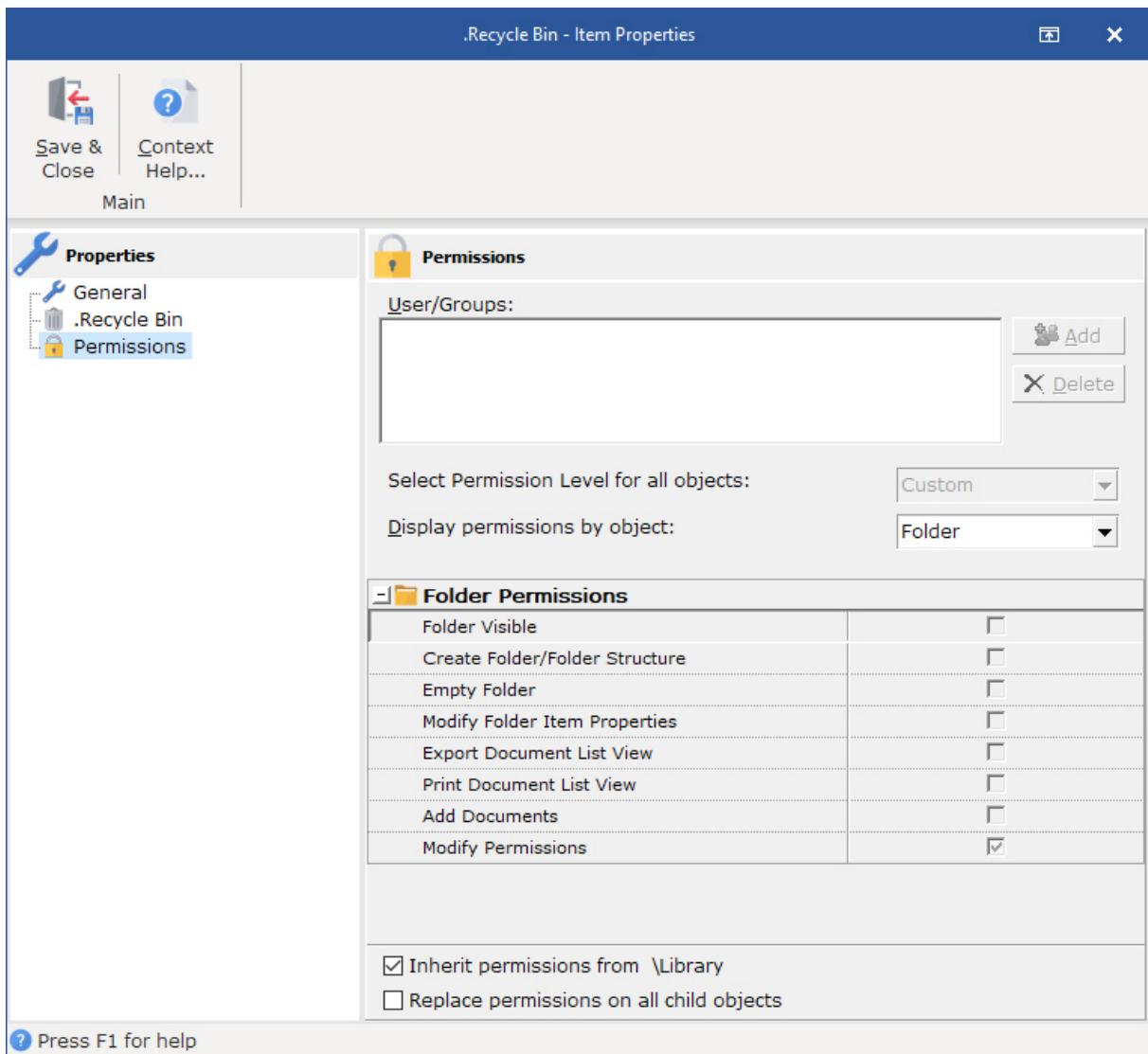
Permissions allow you to create sets of security properties for a DocuXplorer object.

Tip:

Permissions are generally inherited from the Library. To change permissions for the Recycle bin object you must uncheck the Inherit permissions from Library box before setting new permissions for users or groups.

The Work Folder

Work Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Work Folder located on the Library Tree is used as a default location for adding documents when a Folder has not been chosen or permission to add documents to a Folder is not allowed. Using the Send To command in Windows Explorer when the program is closed will also result in adding the new documents to the Work Folder.
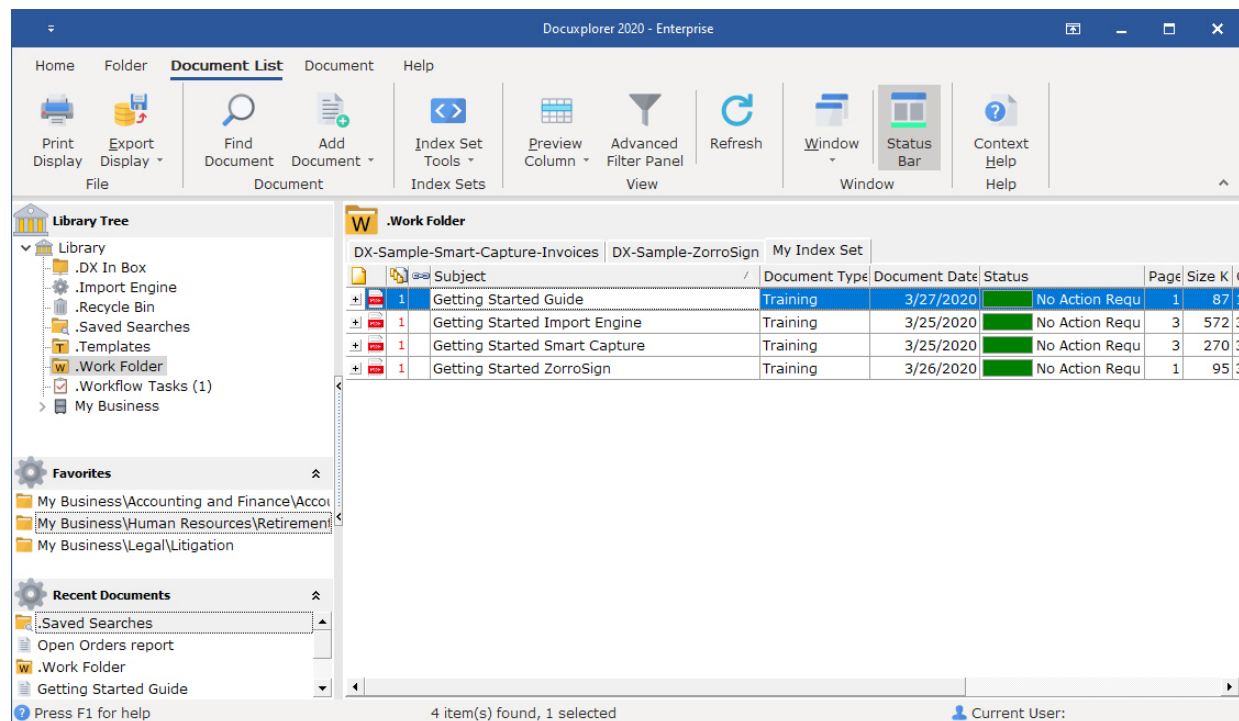
Tip:

The Work Folder can also be used to create workflows by either task or employee. For example to create a workflow by task: create Work Folder sub-folders for each task in the workflow. Make sure to default these sub-folders to the Index Set associated with the document type. Move documents to the first task and have employees look for their next job document in that task folder. As they complete that task the document would be moved to the next task

folder for action until all the tasks were complete and the document was ready for permanent storage in a Folder in a Cabinet.

Another valuable use is as a mailbox. Create sub-folders of the Work Folder for each employee. Documents that need some action can be left in the employee folder. The employee would visit their folder at various times in the day to take action on the documents present.

Work Folder Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

From the DocuXplorer Desktop:

To view or change Work Folder properties:
- Highlight the Work Folder icon on the Library Tree
- Right click and select Properties on the right-click menu

The Work Folder is a special object in DocuXplorer and is a part of the Library. All Work Folder subfolders will act like regular folders with the additional properties available to them.

General Properties provides you with information that identifies the object selected. Identification is based on GUID serial numbers (long strings of numbers and letters that are unique to the object). The only editable field on this screen is the object description field.

General

General Properties

- Folder ID - this item is the unique ID number given to this folder. This item can not be edited and is used by tech support to determine folder identification
- Permission ID - this item is the unique ID number given to the permission set for this folder. This item can not be edited and is used by tech support to determine database and folder identification
- Connection Path - this item provides information on the location and connection path for this folder. This item cannot be edited and is used by tech support to determine database and folder identification
- Access - the date and time this folder was last accessed
- Modified - the date and time this folder was modified
- Create - the date and time this folder was created

- Document Count - the number of documents contain in this folder
- Description - an editable field that can be used to provide a description of what is contained in this folder or any other memo information you might want to attach to this folder

Work Folder Display
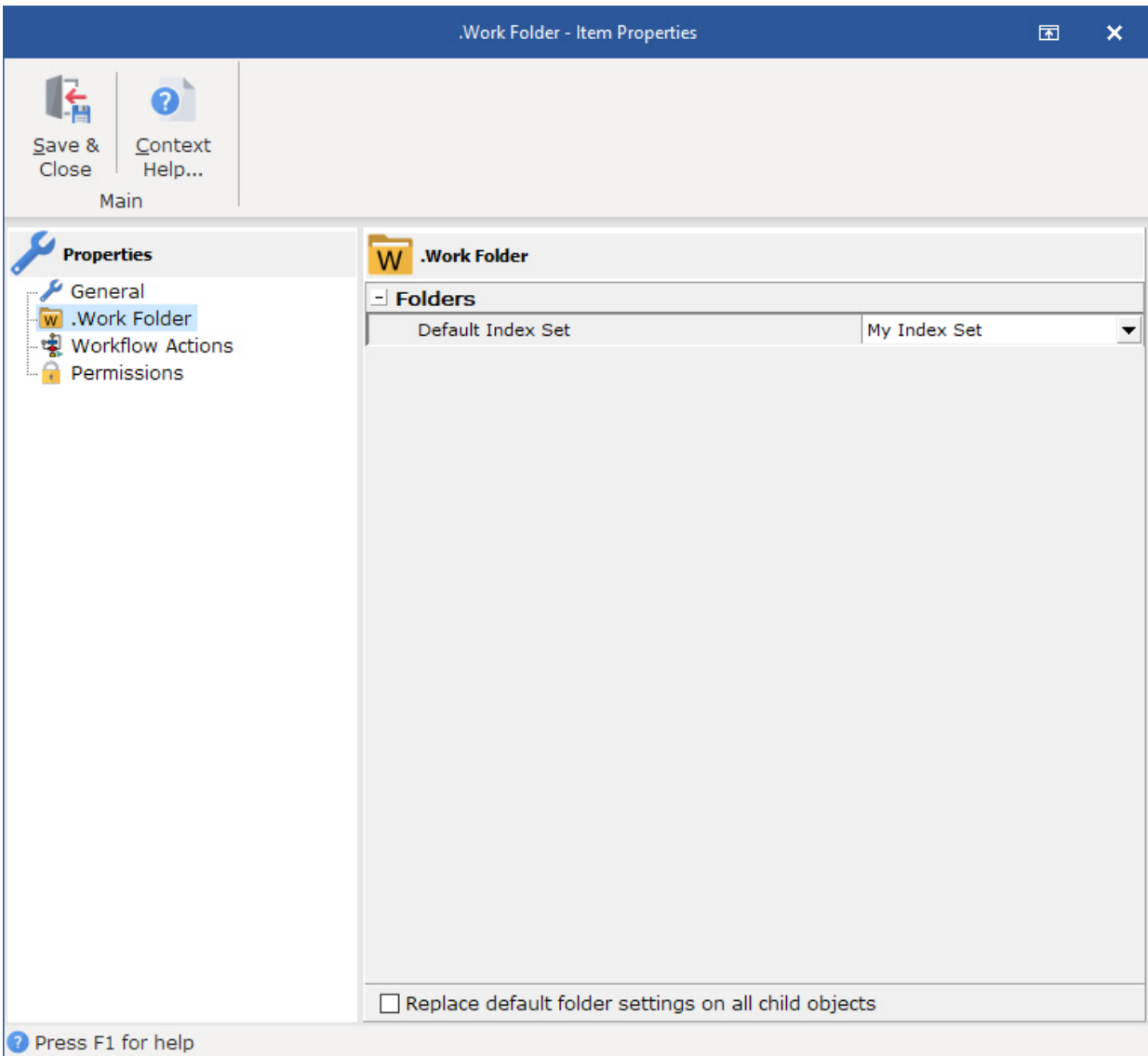
Default Index Set - The Folder's Default Index Set can be selected from the drop list.

Work folder Workflow Actions
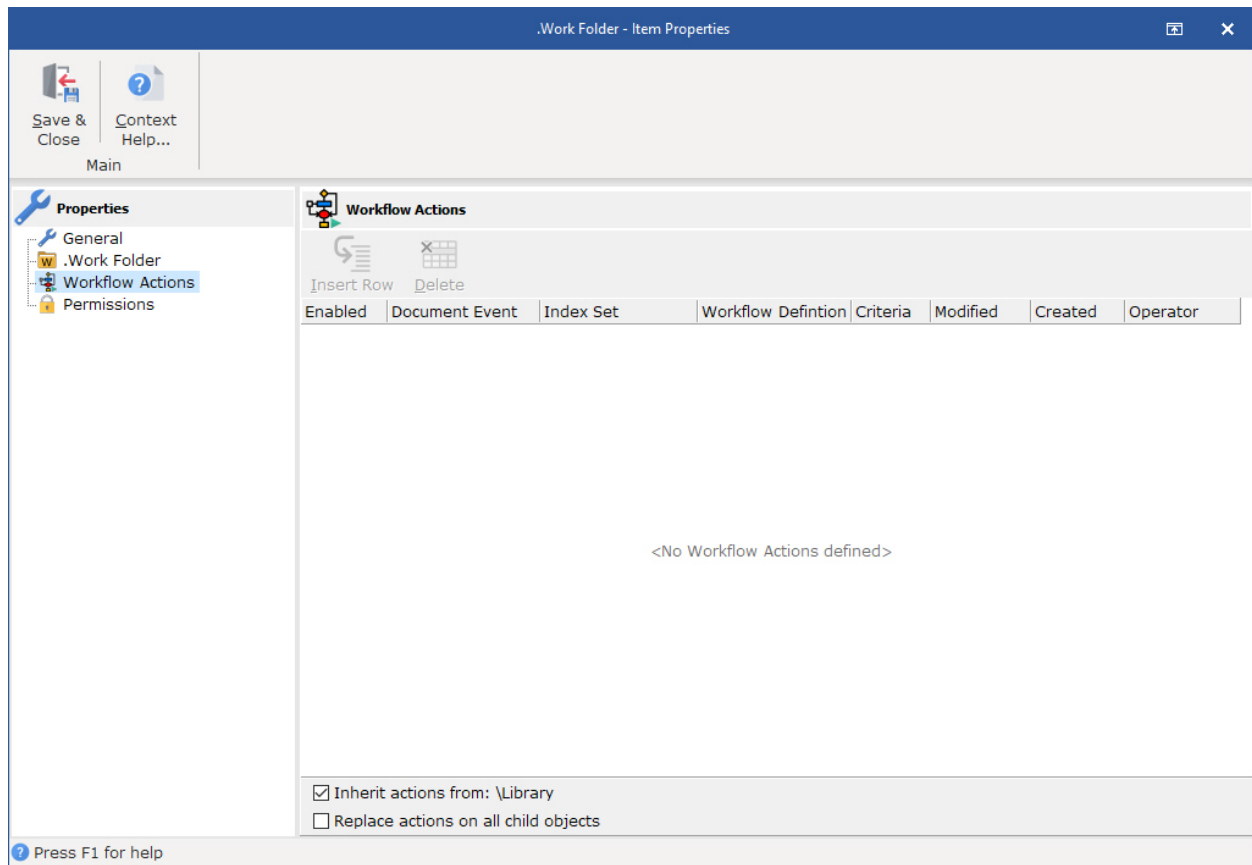
Work Folder Permissions
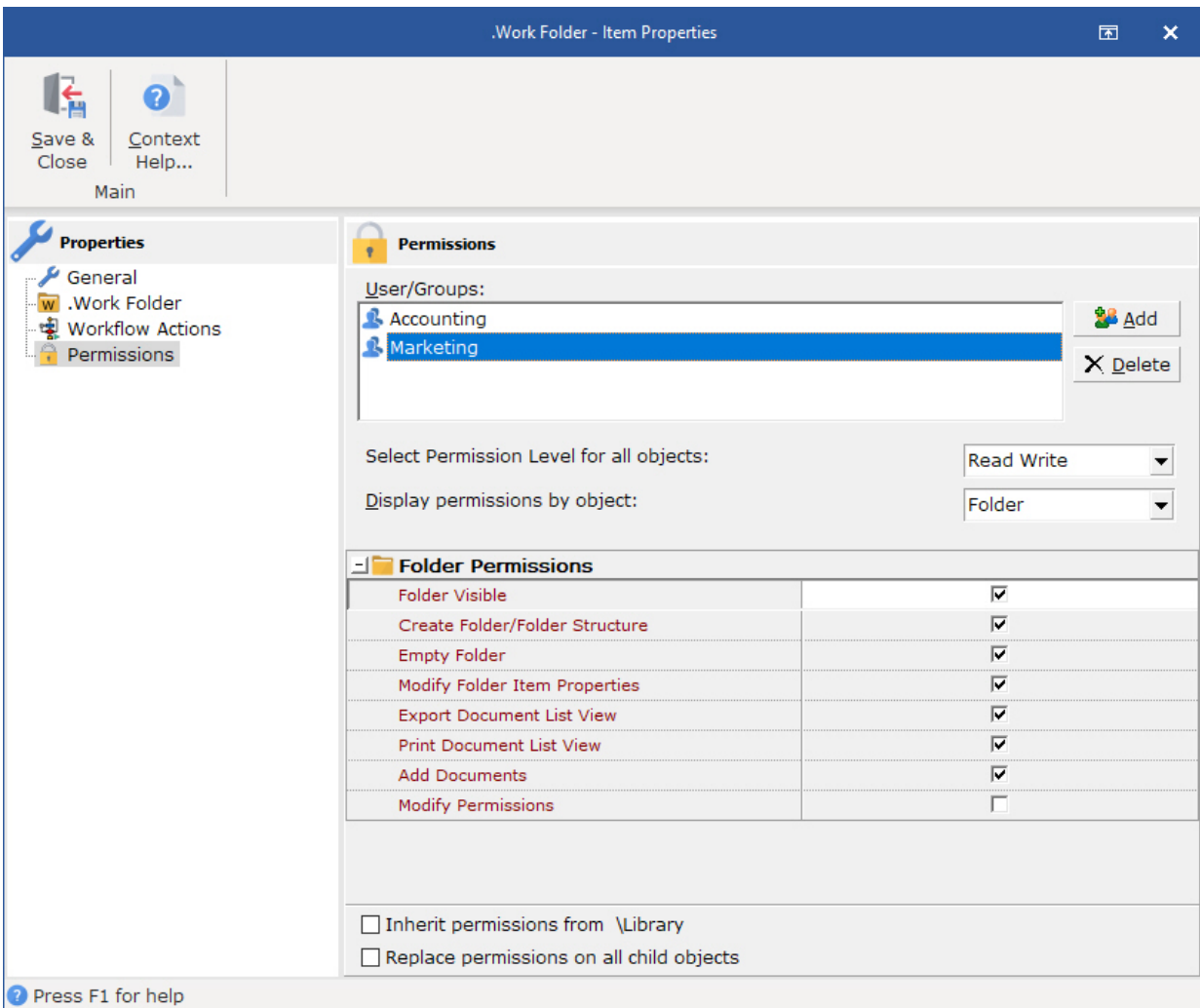
Permissions allow you to create sets of security properties for a DocuXplorer object.

Tip:

Permissions are generally inherited from the Library. To [change permissions](#) for the Work Folder object you must uncheck the Inherit permissions from parent box before setting new permissions for users or groups.

Working with Cabinets

About Cabinets

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

When creating a logical hierarchy using Cabinets, Drawers, and Folders for filing your documents a Cabinet is the second hierarchical level of the DocuXplorer Library. The hierarchy is just one method used to manage and retrieve documents. As in your physical filing system, a cabinet contains [drawers](#) that in turn contain [folders](#) that contain [documents](#).

The Cabinet databases contain the index information used to identify documents.

Note:

In organizing your DocuXplorer Library the highest level of a search is the Cabinet level. Store all documents you would want to search for together in the same Cabinet. If you want to search through all your documents at the same time you would create a single Cabinet with many Drawers. If you are storing multiple types of documents (HR, AP, Client, etc.) you would create a Cabinet for each document type.

Create a new Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

DocuXplorer Personal and Small Business users can only create a single Cabinet.

DocuXplorer Enterprise and Pro users can create an unlimited number of Cabinets.

From the DocuXplorer Desktop:

A Cabinet must be located on a device local to its Library. A device local to a Library would be a hard drive, CD-ROM, DVD or other storage device physically attached to a machine containing the Library.

Examples are as follows:
1. A Library is located on a Network Server with multiple hard drives. All those hard drives would be local to that Server, therefore a Cabinet could be stored on any of those drives.
2. A Library is located on a local (i.e. C:\" drive) and the computer is connected to a network - all Cabinets would need to be located on the local C drive and could not be placed on any network drive as they would not be considered local to the Library
3. A Library is located on a laptop that is sometimes connected to a network - in this instance a user would have a local Library on the laptop so that sets of documents could be accessed when away from the network. If they wanted to take documents from the network with them they would copy Cabinets from the network server to their laptop and connect them to their local Library (the Cabinet would have to be stored on the laptop hard drive or CD drive to connect with the laptop Library). When in the office and connected to the network server they could change Libraries by changing the Connection Path for the Library displayed and have access to the network's local Library.

To create a new cabinet:
- In the Library Tree Window highlight the Library icon
- Click the right mouse button to bring up a menu

- Choose Create Cabinet - DocuXplorer will create a Cabinet, its first Drawer and its first Folder
- [Rename](#) each object (Cabinet, Drawer and Folder)
- Set [Cabinet properties](#) as needed, Cabinet Properties include default Index Set, users and groups, and security permissions

Tip:

The Cabinet, by default, inherits the Library Properties. Changes can be made to the Cabinet Properties in the Cabinet Properties dialog box.

Opening a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

From the DocuXplorer Desktop:

To open a Cabinet:
- ▪ Click the plus sign to the right of the Cabinet to open to display its Drawers

Or

- ▪ Double click the Cabinet to open

Closing a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To close a Cabinet:

- ▪ Click the minus sign to the right of the Cabinet to close

Or

- ▪ Double click the Cabinet to close

Move a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

To move a Cabinet to new location:
- Make sure that all users have closed the Cabinet to be moved
- Right click the Cabinet to move and select Properties from the drop down menu
- Write down the Database ID and Connection Path Location found on the General Tab
- Right click Cabinet icon and select Disconnect Cabinet
- Close DocuXplorer
- Open Windows Explorer and locate your default data location (usually the DXDOCS folder)
- Select all the files associated with that Cabinet - all files will begin with the Database ID information found in the Cabinet Properties (e.g. CAB200410817618*.*)
- Drag and Drop the files to their new location
- Open DocuXplorer
- Right click the Library Icon and select Connect Cabinet
- From the dialog box click the browse button to locate the new Cabinet location

Tip:
A Cabinet can only be moved to a [storage device local to its Library](#).

Rename a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To rename a Cabinet:
- ▪ Highlight the Cabinet to be renamed
- ▪ From the right-click mouse button menu choose rename

Or
- ▪ Click F2
- ▪ Type in a new name for the Cabinet

Or use the Edit Menu on the Menu Bar to rename a Cabinet

Connect to a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

DocuXplorer allows users with the correct security permissions to disconnect and reconnect Cabinets.

The Connect to Cabinet dialog will display a list of Cabinets that can be connected to the Library. Cabinets located in the same folder as the DX Library will be displayed on the list in the dialog box with their full file name to insure the correct selection. To locate Cabinets stored on a local drive outside the DX Library Folder including CD or DVD drives use the browse button. Local drives are drives attached to the server or computer storing the DX Library. It is required that the connection path to a Cabinet be entered as a UNC path

A Cabinet must be located on a device local to its Library. A device local to a Library would be a hard drive, CD-ROM, DVD or other storage device physically attached to a machine. That machine could be either a local computer or network server.

Examples are as follows:

1. A Library is located on a Network Server with multiple hard drives, all those hard drives would be local to that Server, therefore a Cabinet could be stored on any of those drives.

2. A Library is located on a local (i.e. C:\" drive) and the computer is connected to a network - all Cabinets would need to be located on the local C drive and could not be placed on any network drive as they would not be considered local to the Library

3. A Library is located on a laptop that is sometimes connected to a network - in this instance a user would have a local Library on the laptop so that sets of documents could be accessed when away from the network. If they wanted to take documents from the network with them they would copy Cabinets from the network server to their laptop and connect them to their local Library (the Cabinet would have to be stored on the laptop hard drive or CD drive to connect with the laptop Library). When in the office and connected to the network server they could change Library by changing the Connection Path for the Library displayed and have access to the network's local Library

From the DocuXplorer Desktop:

To connect to a Cabinet:

- Right click the Library Icon and select Connect Cabinet
- From the dialog box select the Cabinet to connect
- Click Connect
- DocuXplorer will automatically perform a refresh when Cabinets are being connected. All open Cabinets in the Library will close. click the Cabinets to reopen after the automatic refresh.

Warning:

DocuXplorer will not allow connection to a Cabinet which has not been converted from a previous version. Attempting to connect to a Cabinet from a previous version will cause harm to your previous and existing DocuXplorer databases requiring a Level 2 Tech Support incident repair. Make sure you have converted all existing Drawers during the installation of a new version.

Tip:

- Connecting and disconnecting Cabinets is unavailable when accessing DocuXplorer via the Internet.
- Use the Refresh button to insure that all disconnected Cabinets are displayed on the list.

- Personal and Small Business users cannot disconnect from a Cabinet to create a new Cabinet. DX Personal and Small Business allows only one Cabinet to be created.

Disconnect a Cabinet

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

From the DocuXplorer Desktop:

To disconnect a cabinet;
- Make sure no other users are accessing the Cabinet to be disconnected
- Select the Cabinet to disconnect from
- Bring up the right-click mouse menu
- Click on Disconnect Cabinet

Tip:

Connect and disconnecting Cabinets is unavailable when accessing DocuXplorer via the Internet

Perform Maintenance

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑Small Business

This administrator feature is found on the right-click menu of the DocuXplorer object (Library, Cabinet or Drawer). By default Perform Maintenance will rebuild indexes for all database tables associated for the select object.

DocuXplorer also allows you to reclaim space on the hard drive that has been allocated to the DocuXplorer database and is no longer being used. This feature will be most valuable in reclaiming space allocated to the Recycle Bin. After the Recycle Bin is emptied of a large number of deleted documents the Library might be reserving more space than is actually needed to store its data. Use this feature to reclaim that space on your hard drive for use by other programs.

Selecting "Validate data integrity" will check the integrity of workflows, documents and security.

If you are getting an error with workflow tasks that the a taskid or workfow id already exists, it may be due to orphaned task records. Validate data integrity will also delete orphaned workflow tasks that are not accessible in the task list. These records are usually orphaned by a workflow design that did not have a properly managed error handler, and the workflow stopped due to an error.

You may also reclaim space from Cabinets and Drawers although any allocated space in these objects are made available to new documents after documents are deleted.

Please note that if any damaged documents are found a warning message is displayed. Once the dialog message is acknowledged the process will continue with the next file in its list

The "Include All Drawers" option is only visible when a Cabinet is selected. This feature will process all drawers in addition to the cabinet tables. Use the "Perform Maintenance" on individual drawers if only one drawer needs to be processed.

When the Cabinet or Drawer property "Index Set Search" or "Document Content Search" are not being maintained Perform Maintenance will rebuild these indexes at the same time.

Tip:

This function is only available to administrators and must be run from the server when using the Enterprise or Small Business version.

If errors are found a dialog will provided directions to locate the problem documents. The dialog will also indicate the name of the backup file created of your original data. Support@DocuXplorer.com should be contacted for assistance or restore your DXLibrary folder files from your backup process.

If a document from the drawer is open for the current session, the option will be grayed out and unavailable.

To reclaim hard space a user must have sole access to the object being compressed. In Enterprise check the Active User List found under the Tools menu to make sure you are the only user logged in to the program.

If you use the default setting for Full Text Indexing (the default is recommended for increased speed) you should periodically use the Perform Maintenance function to allow DocuXplorer to rebuild the indexes to include any changes made to a document's index information.

Cabinet Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To view or change Cabinet properties:
- Highlight the Cabinet icon on the Library Tree
- Right click and select Properties on the drop-down menu

The Cabinet Properties dialog is where users can edit Cabinet Properties.

General

The General Properties fields contain information about the Cabinet. Only the Description Field is editable and can be used to add a description of the Cabinet.

General Properties

Folder ID - this item is the unique ID number given to this folder. This item can not be edited and is used by tech support to determine folder identification

Permission ID - this item is the permission set ID either set in this object or inherited by it from a parent object

Database ID - this item is the unique ID number given to the database storing this folder. This item cannot be edited and is used by tech support to determine database and folder identification

Connection Path - this item provides information on the location and connection path for this folder. This item cannot be edited and is used by tech support to determine database and folder identification

Accessed - the date and time this folder was last accessed

Modified - the date and time this folder was modified

Created - the date and time this folder was created

Document Count - the number of documents contained in a Drawer or Folder. The Cabinet object holds no documents so it will always be 0

Description - an editable field that can be used to provide a description of the data contained in the object.

Cabinet

The Cabinet Properties dialog box allows you to set defaults for deleting documents and monitoring database size.
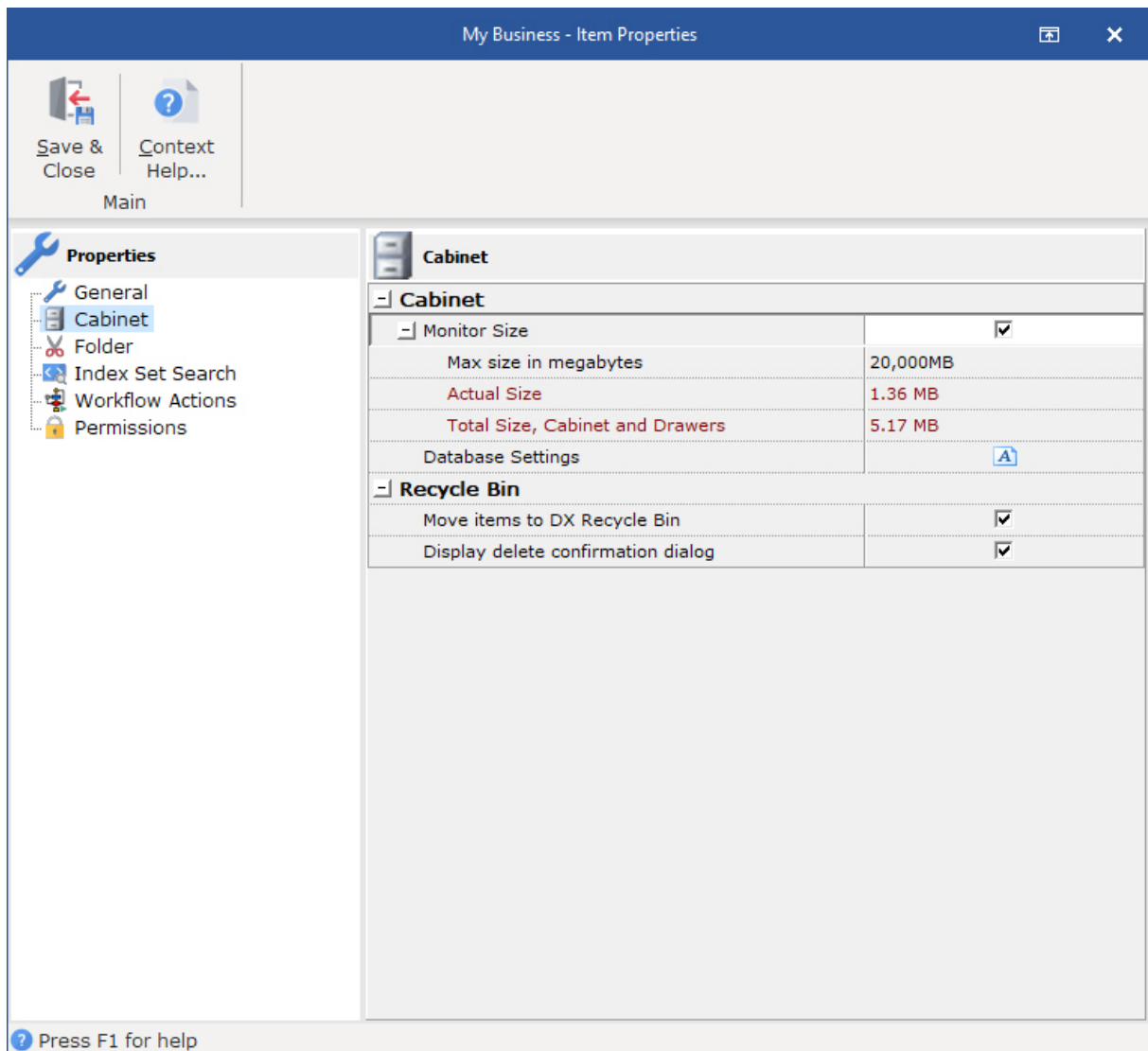
Cabinet

Allows users to set the maximum aggregate size of the Cabinet database tables. The aggregate size would include all files that are part of the Cabinet - the

Cabinet tables that contain the index information attached to a document, pointers to documents in the Drawer database tables,and Index Set tables.

Setting a maximum aggregate size provides an alarm dialog to warn when the maximum object size has been reached

Actual size - the actual size of the database table

The ability to monitor database size is unavailable when accessing the DocuXplorer data from a remote location via the Internet.

Max size in megabytes - set the maximum size for the database table. The image above shows a Cabinet of 4000 MB or 4 GB. The maximum size of a Cabinet or Drawer that can be entered is 30 GB represented by 30000 MB. The minimum size that can be entered is 500 MB. The initial default size is 10 GB. A Cabinet or Drawer can be expanded to as much as 14 terabytes with Level 2 Support.

Database Settings

should only be used when instructed by an DX engineer. This information is used to adjust performance information for indexes, block size, page size and database format version information.

version=#.##

ximagepagesize=512,1024,2048,4096, 8192

xindexpagesize=

Recycle Bin

Move items to Recycle Bin - check to send deleted items to the recycle bin. If left unchecked items will be deleted without going to the Recycle Bin. The Recycle Bin gives users the opportunity to recover deleted items.

Display deletion confirmation dialog - if checked a dialog box will display asking users to confirm any deletion request.

Tip:

It is recommended that at least one of the boxes be checked.

[Folder Properties](#)
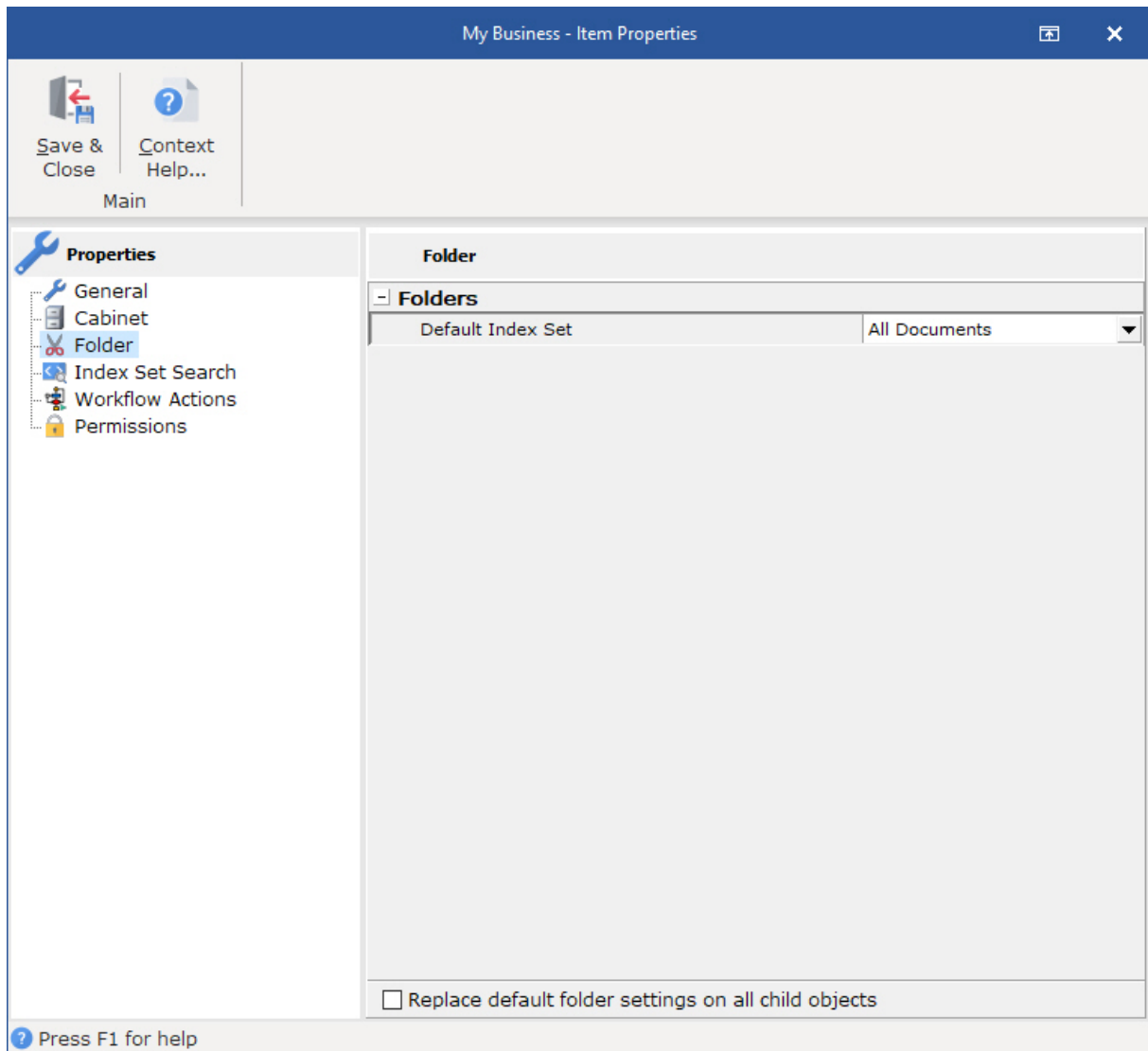
The Folder Properties dialog box allows you to set the default Index Set for any new Drawers created in the Cabinet.

Replace default folder settings on all child objects - checking this box will change the default Index Set on all child objects.

Index Set Text Search

Index Set Text Search options can be changed for each Cabinet as a property of the object. Settings at the Cabinet level effects searches through the index data entered into DocuXplorer fields.

Default settings are as follows;

Conditional Drop Characters - Conditional drop characters are a special type of drop character. These characters are dropped only if they are at the beginning or the end of a word. This provides a mechanism for allowing certain characters to be maintained if they appear inside words. The default conditional drop characters are (,.?!;:@#$%^&()-_).

For example:

One of the default conditional characters is the period. This means that periods on the ends of words will be stripped from the text, but if they are in the middle of a word (e.g., in a number such as 48.5), then they will be maintained.

Drop Characters - Drop characters are a set of characters that are simply ignored by the FTS engine. Drop characters are ignored in both the text and in search strings. The default drop characters are the double quote, the single quote, and the back quote. Administrators can add additional Drop Characters in the Drop Characters/Additional field.

> For example:

> > If the defaults are used and a name such as O'Malley is in the text, the FTS engine will store OMalley (without the quote) as the key value. A search word of either OMalley or O'Malley will find it because the quote would be stripped out of the search word too.

Noise Words - The noise words are words that are ignored by the FTS engine. Once a word is recognized according to the other rules (after obeying delimiters, drop characters, minimum word length, etc.), the word is checked against the noise word list and is ignored if it is found in that list.

> The default noise word list includes the following words:

> > about after all also and another any are because been before being between both but came can come could did does each else for from get got had has have her here him himself his how into its just like make many might more most much must never now only other our out over said same see should since some still such take than that the their them then there these they this those through too under use very want was way well were what when where which while who will with would you your

Delimiters - Delimiters are the set of characters that define word boundaries. The default set of delimiters includes the white space characters, which are the space (0x20), backspace (0x08), tab (0x09), newline (0x0A), vertical tab (0x0B), form feed (0x0C), and carriage return (0x0D). This works for most standard text documents. WordPerfect documents are an example of documents that use delimiters to define boundaries. DocuXplorer has been programmed with the Symbol (highbit) character € that WordPerfect uses to define its boundaries.

Delimiters are always case sensitive. If, for example, you want to use "x" (0x78) and "X" (0x58) as delimiters, then you must specify both characters as delimiters regardless of the case sensitivity option.

Index Options

Minimum Word Length - This option specifies a minimum cut-off point for word recognition. Any word that is shorter than the specified minimum length is simply ignored; these words will not be in the FTS index nor will they be used if they are given in a search condition. When creating an FTS index via SQL, the default minimum word length is 3.

Tip:

Reduce the minimum word length if you often search for two letter acronyms such as, PO.

Maximum Word Length - The maximum word length specifies the maximum word size that can be stored in the FTS index. This is effectively the key length of the index. In general, you should try to choose a length that is longer than most or all words that are in the information being indexed. The default maximum word length is 30.

Protect Numbers - This option covers a very specific situation. If it is given and the comma and/or period is given as a delimiter character, then numbers that contain commas and/or periods will not be broken into multiple words on those delimiters. With "normal" text, the default delimiters and conditional drop characters will suffice. Using all default settings, the comma and period are not delimiter characters (they are conditional drop characters). Text such as "1,423.99" would be treated as a single word. If you created an FTS index with the period and comma as delimiter characters, then that text would be broken up into three words "1, 423, and 99". If you use the Protect Numbers option, then this would not occur. This option may be useful, for example, if the text contains words that have only commas between them (with no other delimiters). In that case, it may be desirable to treat the comma as a delimiter.

Maintain Automatically - DocuXplorer can automatically maintain Index Set and OCR text.

In the <Tools/Options/Full Text Search dialog> the option's default is set to "On". This allows new Cabinets to automatically inherit the "On" default.

Permissions - security not available in DocuXplorer Personal or Small Business

DOCUXPLORER

My Business - Item Properties

Save & Close | **Context Help...**

Main

Properties
- General
- Cabinet
- Folder
- Index Set Search
- Workflow Actions
- Permissions

Permissions

User/Groups:

👤 Accounting	
👤 Marketing	

Add
Delete

Select Permission Level for all objects: **Read Write** ▼

Display permissions by object: **Show All Objects** ▼

Cabinet Permissions	
Cabinet Visible	☑
Create Drawers	☐
Delete Cabinet	☐
Rename Cabinet	☐
Connect Drawers	☐
Disconnect Cabinets	☐
Modify Folder Item Properties	☑
Modify Permissions	☐

Drawer Permissions	
Drawer Visible	☑
Create Folder/Folder Structure	☑
Delete Drawers	☐
Rename Drawer	☐
Copy Folder Structures	☐
Disconnect Drawers	☐
Modify Folder Item Properties	☐
Modify Permissions	☐

Folder Permissions	
Folder Visible	☑
Create Folder/Folder Structure	☑
Delete Folders	☑
Modify Folder Item Properties	☑
Export Document List View	☑
Print Document List View	☑
Add Documents	☑
Rename Folder	☑
Copy Folders	☑
Move Folders	☑
Modify Permissions	☐

Document Permissions	
Document Visible	☑
Modify Document Index Data	☑
Modify Document Image	☑
Delete Documents	☑
Modify Document Item Properties	☑

☐ Inherit permissions from \Library
☐ Replace permissions on all child objects

❓ Press F1 for help

Permissions allow you to add users and groups and set security properties for users and groups in the Cabinet.

- See the Security/Users/Groups help item for more information on how to add users and groups to a Cabinet.

- See Security/Cabinet Permissions for more information about setting Cabinet permissions.

Tip:

Permissions are generally inherited from the Library. To change permissions for the Cabinet object you must uncheck the Inherit permissions from parent box before setting new permissions for users or groups.

Working with Drawers

About Drawers

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The Drawer hierarchical object stores folders.

Drawers contain the database tables that store the document image information in DocuXplorer.

Drawer properties are inherited from its parent, usually the settings of the Library object. Any changes needed to the default settings can be made in the Document Properties dialog Box by an administrator.

Document Index and Document Content Search Options are inherited from the settings in the <Tools><Options> menu item. Any changes needed to the default settings can be made in the Document Properties dialog box by an administrator.

Drawers are always associated with a specific Cabinet and can not be associated with any other Cabinet. Any Drawer stored off-line should always be stored with its associated Cabinet.

Create a new Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

A Drawer must be located on a device local to its Library. A device local to a Library would be a hard drive, CD-ROM, DVD or other storage device physically attached to a machine containing the Library. That machine could be either a local computer or network server.

Examples are as follows:

1. A Library is located on a Network Server with multiple hard drives. All those hard drives would be local to that Server, therefore a Drawer could be stored on any of those drives.
2. A Library is located on a local (i.e. C:\)drive and the computer is connected to a network - all Drawers would need to be located on the local drive and could not be placed on any network drive as they would not be considered local to the Library
3. A Library is located on a laptop that is sometimes connected to a network - in this instance a user would have a local Library on the laptop so that sets of documents could be accessed when away from the network. If they wanted to take documents from the network with them they would copy Drawers from the network server to their laptop and connect them to their local Library (the Drawer would have to be stored on the laptop hard drive or CD drive to connect with the laptop Library). When in the office and connected to the network server they could change Library by changing the Connection Path for the Library displayed and have access to the network's local Library

To create a new Drawer:
- On the Library tree highlight the Cabinet where you wish to create your new drawer
- Click your right mouse button to bring up the menu
- Click on the Create Drawer to create a Drawer and its first folder
- Rename the Folder and Drawer

Opening a Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To open a Drawer:

- Double click the Drawer

Or

- Click the plus sign to the right of the Drawer you wish to open

Closing a Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To close a Drawer:

- ▪ Double click the Drawer

Or

- ▪ Click the minus sign to close the Drawer

Copy Folder Structure

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Available as Copy from the right-click menu of a Drawer or Folder:

Copy Folder Structure allows users to copy the complete folder structure of an existing Drawer or Folder to a new one. The Folder Structure is all the folders listed below the object being copied. All the Drawer or Folder properties will be copied to the new location. Drawer and Folder properties include, folder and subfolders, default Index Set and security settings.

To copy the structure of a Drawer;
- Right click the Drawer with the Folder Structure to copy
- Click on Copy
- Right click the Drawer to copy the Folder Structure to
- Click on Paste Folder Structure

To copy the structure of a Folder and all its sub-folders;
- Right click the Folder with the Folder Structure to copy
- Click on Copy
- Right click the Drawer or Folder to copy the Folder Structure to
- Click Paste Folder Structure to paste all the sub-folders and properties of the structure being copied

Or use the Edit Menu on the Menu Bar to paste a Folder Structure

Tip:

This feature is valuable for users that create drawers for specific years or projects that require replication of folder structures in each of the new Drawers created.

Rename a Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To rename a Drawer:
- Highlight the Drawer to be renamed
- From the right-click mouse button menu choose rename

Or
- press F2
- Type in a new name for the Drawer

Or use the Edit Menu on the Menu Bar to rename a Drawer.

Connect to a Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer allows users with the correct security permissions to disconnect and reconnect Drawers.

The Connect to Cabinet dialog will display a list of Drawers that can be connected to the Library. Drawers located in the same folder as the DX Library will be displayed on the list in the dialog box with their full file name to insure the correct selection. To locate Drawers stored on a local drive outside the DX Library Folder including CD or DVD drives use the browse button. Local drives are drives attached to the server or computer storing the DX Library. It is required that the connection path to a Cabinet be entered as a UNC path

A Cabinet must be located on a device local to its [Library](). A device local to a Library would be a hard drive, CD-ROM, DVD or other storage device physically attached to a machine containing the Library. That machine could be either a local computer or network server.

   Examples are as follows:

1. A Library is located on a Network Server with multiple hard drives. All those hard drives would be local to that Server, therefore a Cabinet could be stored on any of those drives.

2. A Library is located on a local (i.e. C:\" drive) and the computer is connected to a network - all Drawers would need to be located on the local C drive and could not be placed on any network drive as they would not be considered local to the Library

3. A Library is located on a laptop that is sometimes connected to a network - in this instance a user would have a local Library on the laptop so that sets of documents could be accessed when away from the network. If they wanted to take documents from the network with them they would copy Drawers from the network server to their laptop and connect them to their local Library (the Cabinet would have to be stored on the laptop hard drive or CD drive to connect with the laptop Library). When in the office and connected to the network server they could change Library by changing the Connection Path for the Library displayed and have access to the network's local Library

From the DocuXplorer Desktop:

To connect to a Drawer:

- Right click the Cabinet Icon and select Connect Drawer
- From the dialog box select the Drawer to connect
- Click Connect. DocuXplorer will automatically perform a refresh when Drawers are being connected. All open Drawers in the Cabinet will close.
- Click on the Drawers to reopen after the automatic refresh.

Warning:

DocuXplorer will not allow connection to a Drawer which has not been converted from a previous version. Attempting to connect to a Cabinet or Drawer from a previous version will cause harm to your previous and existing DocuXplorer databases requiring a Level 2 Tech Support incident repair. Make sure you have converted all existing Drawers during the installation of a new version.

Tip:

- Connecting and Disconnecting Drawers is unavailable when accessing DocuXplorer via the Internet.
- Use the Refresh button to insure that all Drawers being reconnected are displayed on the list.

Disconnect a Drawer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the Drawer icon right-click menu:

To Disconnect a Drawer:
- Make sure no other users are accessing the Drawer to be disconnected
- From the Library tree right-click the Drawer to disconnect to bring up a menu
- Click on Disconnect Drawer

Tip:

Connecting and disconnecting Drawers is unavailable when accessing DocuXplorer via the Internet

Perform Maintenance

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑Small Business

This administrator feature is found on the right-click menu of the DocuXplorer object (Library, Cabinet or Drawer). By default Perform Maintenance will rebuild indexes for all database tables associated for the select object.

DocuXplorer also allows you to reclaim space on the hard drive that has been allocated to the DocuXplorer database and is no longer being used. This feature will be most valuable in reclaiming space allocated to the Recycle Bin. After the Recycle Bin is emptied of a large number of deleted documents the Library might be reserving more space than is actually needed to store its data. Use this feature to reclaim that space on your hard drive for use by other programs.

Selecting "Validate data integrity" will check the integrity of workflows, documents and security.

If you are getting an error with workflow tasks that the a taskid or workfow id already exists, it may be due to orphaned task records. Validate data integrity will also delete orphaned workflow tasks that are not accessible in the task list. These records are usually orphaned by a workflow design that did not have a properly managed error handler, and the workflow stopped due to an error.

You may also reclaim space from Cabinets and Drawers although any allocated space in these objects are made available to new documents after documents are deleted.

Please note that if any damaged documents are found a warning message is displayed. Once the dialog message is acknowledged the process will continue with the next file in its list

The "Include All Drawers" option is only visible when a Cabinet is selected. This feature will process all drawers in addition to the cabinet tables. Use the "Perform Maintenance" on individual drawers if only one drawer needs to be processed.

When the Cabinet or Drawer property "Index Set Search" or "Document Content Search" are not being maintained Perform Maintenance will rebuild these indexes at the same time.

Tip:

This function is only available to administrators and must be run from the server when using the Enterprise or Small Business version.

If errors are found a dialog will provided directions to locate the problem documents. The dialog will also indicate the name of the backup file created of your original data. Support@DocuXplorer.com should be contacted for assistance or restore your DXLibrary folder files from your backup process.

If a document from the drawer is open for the current session, the option will be grayed out and unavailable.

To reclaim hard space a user must have sole access to the object being compressed. In Enterprise check the Active User List found under the Tools menu to make sure you are the only user logged in to the program.

If you use the default setting for Full Text Indexing (the default is recommended for increased speed) you should periodically use the Perform Maintenance function to allow DocuXplorer to rebuild the indexes to include any changes made to a document's index information.

Drawer Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To view or change Drawer properties:
- Highlight the Drawer icon on the Library Tree
- Right click and select Properties on the drop-down menu

The Drawer Properties dialog contains items where administrators can edit Drawer properties;

General

The General Properties fields contain information about the Drawer. Only the Description Field is editable and can be used for memo information about a Drawer.

General Properties

Folder ID - this item is the unique ID number given to this object. This item cannot be edited and is used by tech support to determine object identification

Permission ID - this item is the permission set ID either set in this object or inherited by it from a parent object

Database ID - this item is the unique ID number given to the database storing this object. This item cannot be edited and is used by tech support to determine database and object identification

Connection Path - this item provides information on the location and connection path for this object. This item cannot be edited and is used by tech support to determine database and object identification

Accessed - the date and time this object was last accessed

Modified - the date and time this object was modified

Created - the date and time this object was created

Document Count - the number of documents contained in this Drawer

Description - an editable field that can be used to provide a description of what is contained in this Drawer or any other memo information you might want to attach to this Drawer

Drawer Properties

The Drawer Properties dialog box allows you to monitor database size for the Drawer.
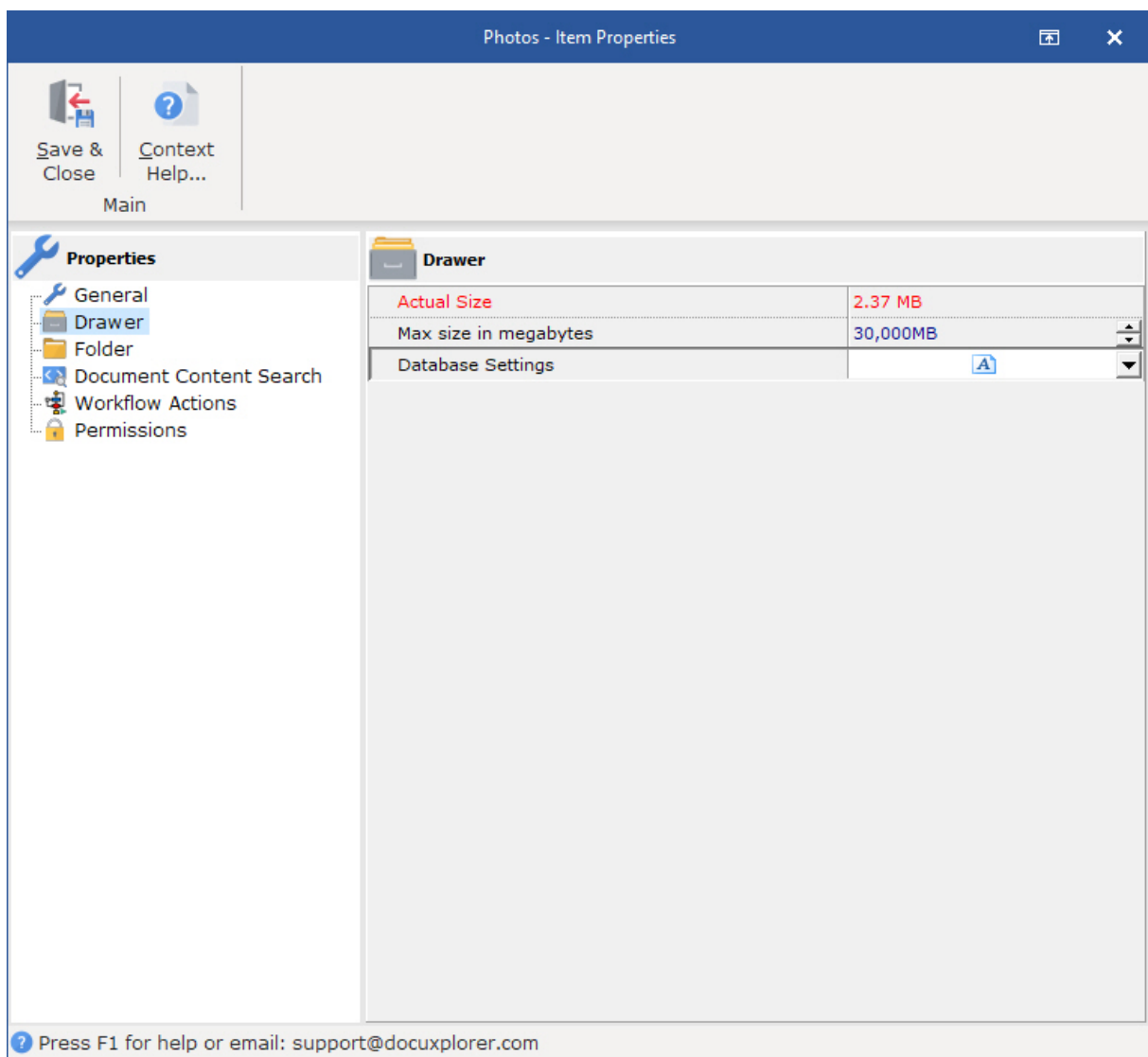
Drawer

Allows users to set the maximum aggregate size of the Drawer database tables. The aggregate size would include all files that are part of the Drawer - the

Drawer tables that contain the index information attached to a document, pointers to documents in the Drawer database tables,and Index Set tables.

Setting a maximum aggregate size provides an alarm dialog to warn when the maximum object size has been reached

Actual size - the actual size of the database table

Max size in megabytes - The maximum size for a drawer is inherited from the Library object. A user can change the maximum size of a Drawer by changing the size being monitored in this field. The image above shows a Drawer of 4000 MB or 4 GB. The maximum size of a Cabinet or Drawer that can be entered is 30 GB represented by 30000 MB. The minimum size that can be entered is 500 MB. The initial default size is 10 GB. A Cabinet or Drawer can be expanded to as much as 14 terabytes with Level 2 Support. Click here to see more information about operating system limitations.

The ability to monitor database size is unavailable when accessing the DocuXplorer data from a remote location via the Internet.

Database Settings

should only be used when instructed by an DX engineer. This information is used to adjust performance information for indexes, block size, page size and database format version information.

version=#.##

ximagepagesize=512,1024,2048,4096, 8192

xindexpagesize=

Folder Properties
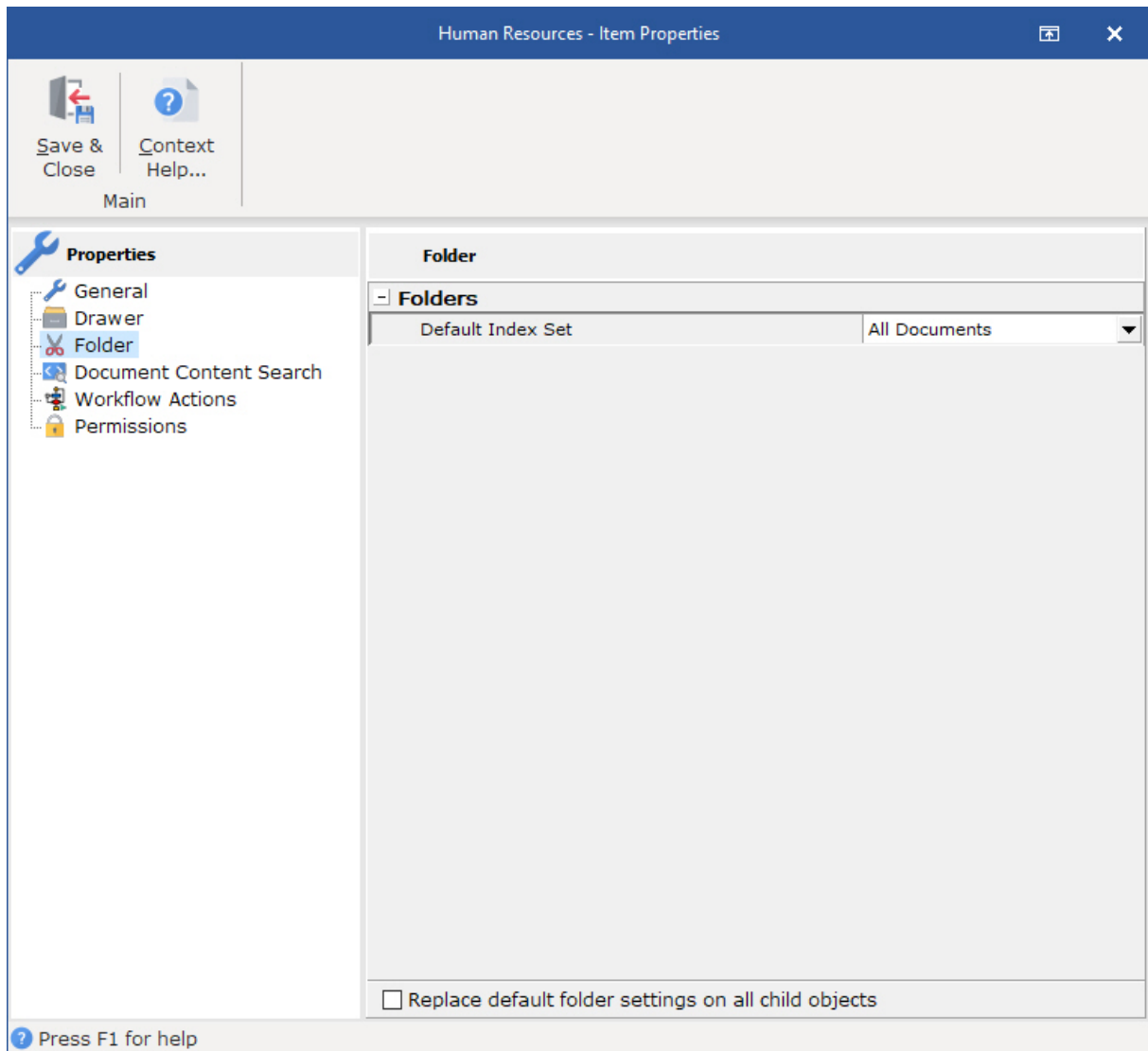
The Folder Properties dialog box allows you to set the default Index Set for any new Folder created in the Drawer

Replace default folder settings on all child objects - checking this box will change the default Index Set on all child objects.

Document Content Search

A Drawer's Document Content Search Properties is inherited from the settings created in <Tools><Options> menu item. Document Content Search options can be changed for each Drawer as a property of the object. Enabling Document Content full text search indexes the contents of documents stored in a Drawer.

Tip:

If a document is in a binary format such as a media file or graphic file, the file information is ignored by the indexing engine. Files like Word, Excel, or WordPerfect store their content information as uncompressed text and allow DocuXplorer to index their content information
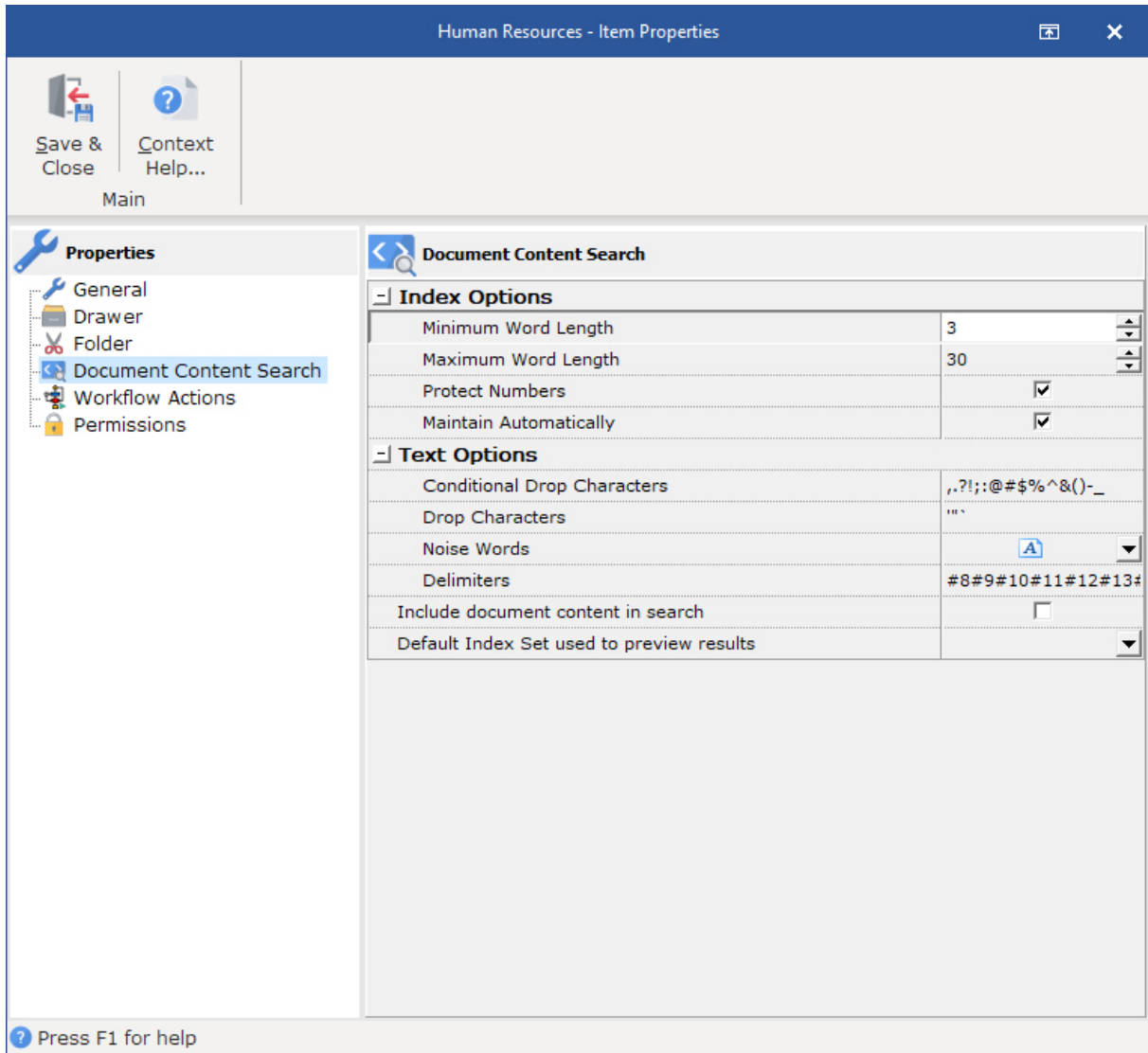
Default settings are as follows;

Document Content Search Properties

Enable Search Option - This item must be checked if you want DocuXplorer to index the full text content of electronic documents. If this option is checked a full Index of a document's content is created when the users selects Save &

Close. A user will be prompted to confirm this change due to the processing time needed to index the full text of the documents already in the folder. Conversely if the option was initially checked and the user unchecks it, the Document Content Index will be removed when the user selects Save & Close. If Enable Search Options is not checked all other properties in this dialog box will grayed out and unavailable.

Text Options

Conditional Drop Characters - Conditional drop characters are a special type of drop character. These characters are dropped only if they are at the beginning or the end of a word. This provides a mechanism for allowing certain characters to be maintained if they appear inside words. The default conditional drop characters are (,.?!;:@#$%^&()-_).

For example:

One of the default conditional characters is the period. This means that periods on the ends of words will be stripped from the text, but if they are in the middle of a word (e.g., in a number such as 48.5), then they will be maintained.

Drop Characters - Drop characters are a set of characters that are simply ignored by the FTS engine. Drop characters are ignored in both the text and in search strings. The default drop characters are the double quote, the single quote, and the back quote. Administrators can add additional Drop Characters in the Drop Characters/Additional field.

For example:

If the defaults are used and a name such as O'Malley is in the text, the FTS engine will store OMalley (without the quote) as the key value. A search word of either OMalley or O'Malley will find it because the quote would be stripped out of the search word too.

Noise Words - The noise words are words that are ignored by the FTS engine. Once a word is recognized according to the other rules (after obeying delimiters, drop characters, minimum word length, etc.), the word is checked against the noise word list and is ignored if it is found in that list.

The default noise word list includes the following words:

about after all also and another any are because been before being between both but came can come could did does each else for from get got had has have her here him himself his how into its just like make many might more most much must never now only other our out over said same see should since some still such take than that the their them then there these they this those through too under use very want was way well were what when where which while who will with would you your

Delimiters - Delimiters are the set of characters that define word boundaries. The default set of delimiters includes the white space characters, which are the space (0x20), backspace (0x08), tab (0x09), newline (0x0A), vertical tab (0x0B), form feed (0x0C), and carriage return (0x0D). This works for most standard text documents. WordPerfect documents are an example of documents that use delimiters to define boundaries. DocuXplorer has been programmed with the Symbol (highbit) character € that WordPerfect uses to define its boundaries.

Delimiters are always case sensitive. If, for example, you want to use "x" (0x78) and "X" (0x58) as delimiters, then you must specify both characters as delimiters regardless of the case sensitivity option.

Index Options

Minimum Word Length - This option specifies a minimum cut-off point for word recognition. Any word that is shorter than the specified minimum length is simply ignored; these words will not be in the FTS index nor will they be used if they are given in a search condition. When creating an FTS index via SQL, the default minimum word length is 3.

Maximum Word Length - The maximum word length specifies the maximum word size that can be stored in the FTS index. This is effectively the key length of the index. In general, you should try to choose a length that is longer than most or all words that are in the information being indexed. The default maximum word length is 30.

Protect Numbers - This option covers a very specific situation. If it is given and the comma and/or period is given as a delimiter character, then numbers that contain commas and/or periods will not be broken into multiple words on those delimiters. With "normal" text, the default delimiters and conditional drop characters will suffice. Using all default settings, the comma and period are not delimiter characters (they are conditional drop characters). Text such as "1,423.99" would be treated as a single word. If you created an FTS index with the period and comma as delimiter characters, then that text would be broken up into three words "1, 423, and 99". If you use the Protect Numbers option, then this would not occur. This option may be useful, for example, if the text contains words that have only commas between them (with no other delimiters). In that case, it may be desirable to treat the comma as a delimiter.

Maintain Automatically - This option maintains the Full Text indexing information for OCR text and is always enabled and can not be changed

Note: If when setting this option you receive an error that more than user is accessing this Cabinet and you know that you are the only user in Cabinet,

simply close the Cabinet and reopen, then place a check in the Maintain Automatically field and the process should continue with error.

Tip:

In the <Tools/Options/Full Text Search dialog> the Maintain Automatically default is set to "Off". The Drawer object of any new Cabinet is then automatically set to "Off" to facilitate the speed of adding documents to Drawers where content indexing of electronic documents is not required. The administrator will need to set a Drawer's Document Content Search Property to "On" to allow document content to be indexed.

Permissions – security not available in DocuXplorer Personal or Small Business
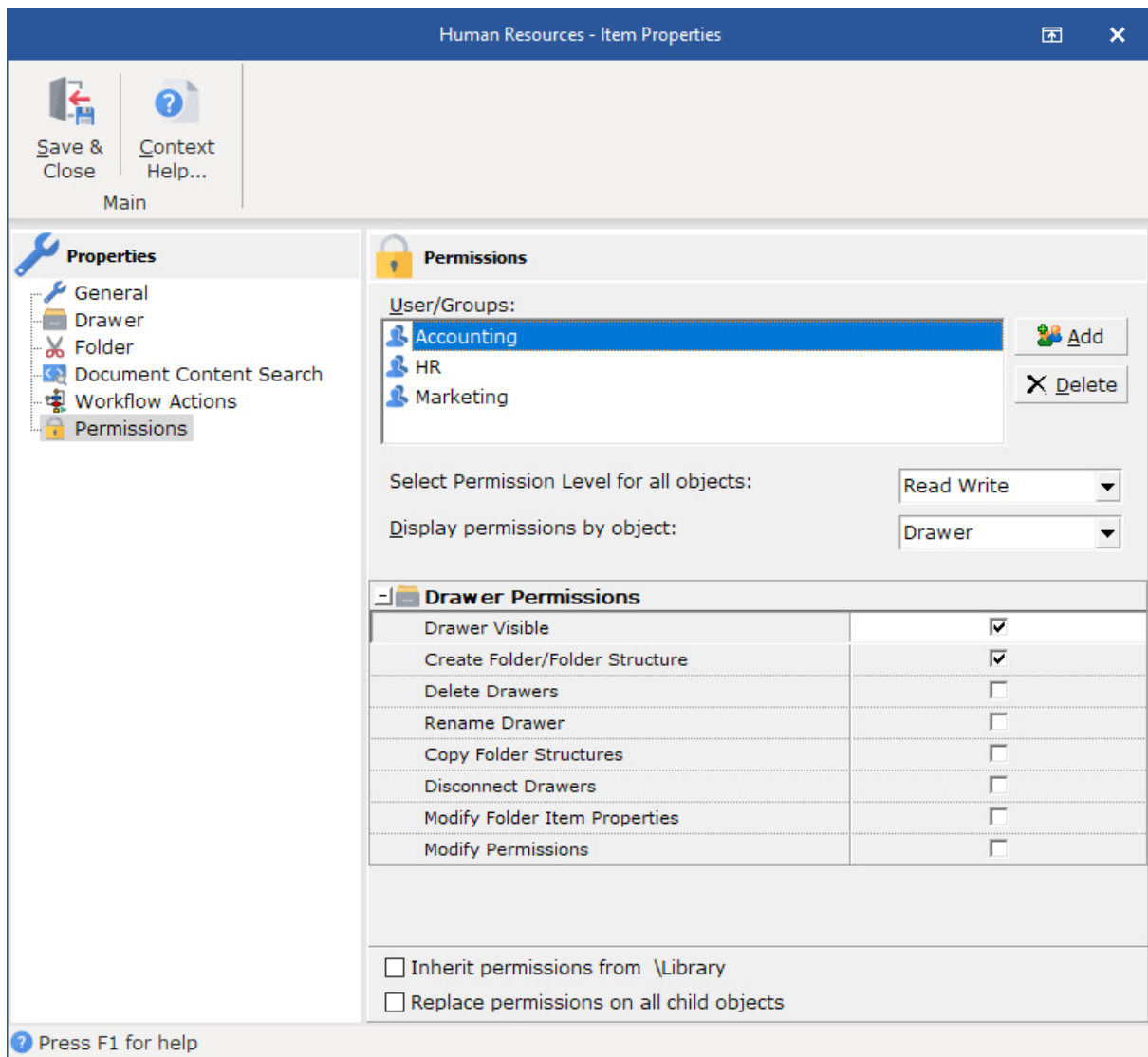
Permissions allow you to add users and groups and set security properties for users and groups in the Drawer.

- See the Security/Users/Groups help item for more information on how to add users and groups to a Drawer.
- See Security/Drawer Permissions for more information about setting Drawer permissions.

Tip:

Permissions are generally inherited from the Library. To change permissions for the Drawer object you must uncheck the Inherit permissions from parent box before setting new permissions for users or groups.

Working with Folders

About Folders

This Help topic refers to the following editions:
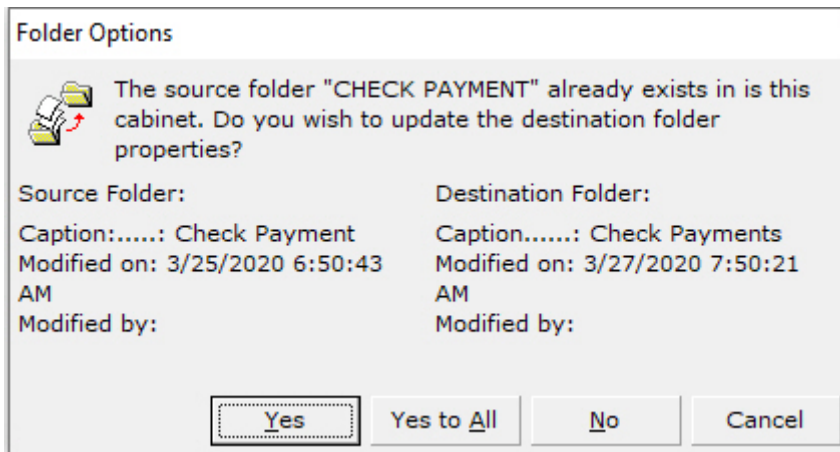☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Folders hold [Child Folders](#) or [Documents](#). Folders can be copied or moved to the [Recycle Bin](#) or a [Drawer](#) in a [Cabinet](#). Moving a Folder will move all the documents contained therein.

Tip:

DocuXplorer defaults to a limit when moving Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of [data locks](#) allowed.

A user with permission can move more then 254 documents at a time but not a folder with more than 254 documents.

The Folder Contents Window displays a list view of the documents it contains. The [Document List View](#) is a key element in sorting and grouping documents for display as well as editing index information, sending documents via email and printing documents and reports from the DocuXplorer Desktop.

Folder Default Index Set

Users can filter the display of a Folder's contents based on an Index Set. Click here to see more information on [Document List View Display Filter](#).

Folders always have an Index Set associated as a default for display.

You can set all new Folders in a DocuXplorer object (Library, Cabinet or Drawer) to default to an Index Set other than All Documents by setting the Default Index Set in the object's Properties/Folder item available from the right-click menu of the object. Default Index Set is an inherited property and a new child object set for inheritance from a parent will automatically be set with the parent's default Index Set.

Tip:

It is recommended that Folders be defaulted to an Index Set and all documents stored in a folder be associated with the Folder's default Index Set.

Create a new Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To Create a Folder:
- Highlight the Drawer or Folder where it is to be added
- Click the object with the right mouse button and choose Create Folder
- Type in the name for the folder

Or
- Highlight the Drawer or Folder where it is to be added
- press the Insert key
- Type in the name for the folder

DocuXplorer also allows user to create Parent Folders from a Child Folder. A Parent Folder is the folder just above the Child Folder (sub folder) in a hierarchy.
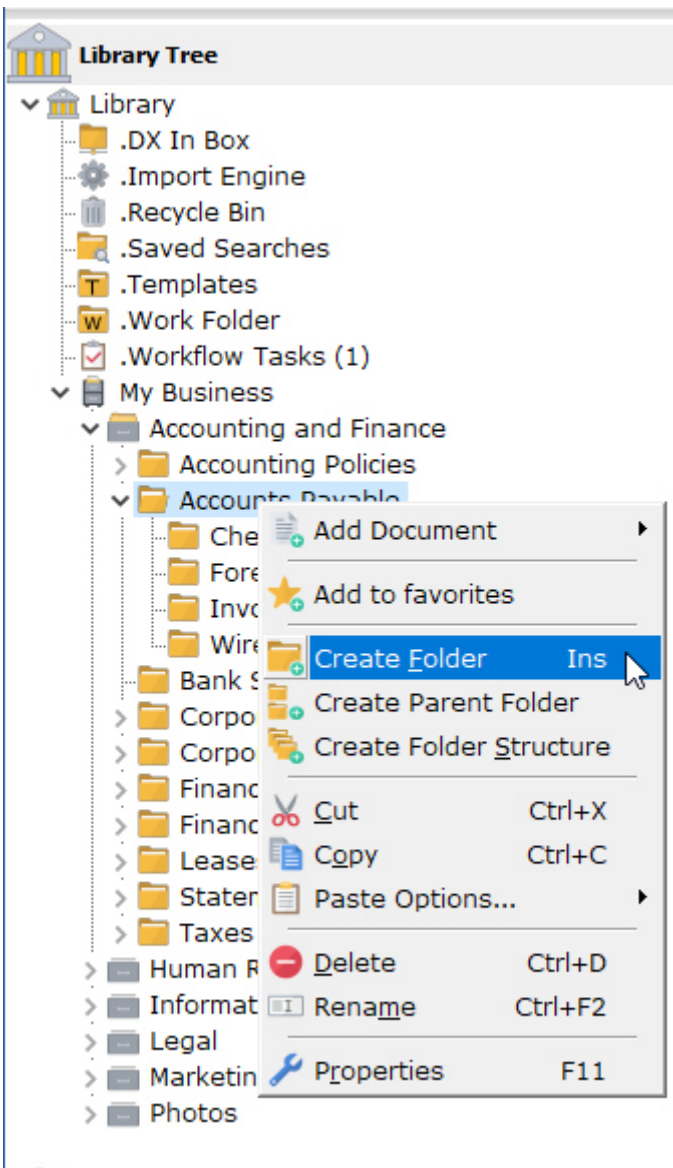
To Create a Parent Folder:
- Highlight the Folder to which a Parent Folder is to be created
- Right click the folder to bring up a menu
- Select Create Parent Folder
- Type in the name for the Folder

After creating a folder select the Folder Properties dialog box from the Folder's right-click drop-down menu and choose a default Index Set to associate with the Folder.

Child Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Child Folders also know as sub-folders are DocuXplorer hierarchical objects that can hold their own Child Folders or Documents. A Child Folder can be copied or moved along with all the documents it contains to another Drawer, the Work Folder or the Recycle Bin.

Tip:

DocuXplorer defaults to a limit when moving Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of data locks allowed.

A user with permission can move more then 254 documents by highlighting the documents to be moved.

Sibling Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Sibling Folders are DocuXplorer hierarchical objects that hold Child Folders or Documents. Sibling folders are on the same hierarchical level as the original folder. A Sibling Folder can be copied or moved to any Drawer along with any Child Folders and documents they contain.

Tip:

DocuXplorer defaults to a limit when moving Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of data locks allowed.

A user with permission can move more then 254 documents by highlighting the documents to be moved.

Index Set View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Index Set view is a drop-down list that determines which index should be used for the documents in the selected folder. It is found on the Toolbar when a Folder has been selected.

The Document Filter affects the display of the current Document List View.

Choosing an Index Set from the Folder Filter drop-down list will cause the folder to display only documents with that Index Set assigned to them. The Column Header Bar for the folder will display the fields and properties assigned to the selected Index Set.

To see all the documents contained in a folder select All Documents from the Folder Filter List. If All Documents is selected as the filter, only the fields assigned to the All Documents Index Set will display on the Column Header Bar. The index information displayed for a document when using the All Documents Index Set filter will be the data attached to the document's assigned Index Set.

Tip:

It is recommended that Folders be defaulted to an Index Set and all documents stored in a folder be associated with the Folder's default Index Set.

It is also recommended that the Subject Field entry be descriptive of a document's contents so that when in All Document display mode you can distinguish between documents..

The Index Set as a Default Folder Property

Index Sets can be assigned to a folder as a default property. When a folder has an Index Set Default Property assigned, it will automatically filter the display so that only documents with that Index Set assigned to them will display. When adding documents to a folder with the Index Set Property, the Document Window that opens will automatically display the default index set. The default Index Set is determined by the settings of the parent object the Folder is inheriting its

properties from. Users can change the Index Set Property assigned to a folder from the Folder Properties dialog box.

Move a Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

To move a Folder:
- Highlight the Folder
- Click the right mouse button.
- Click Cut
- Highlight the new location.
- Click the right mouse button.
- Click Paste

Or Drag and Drop the Folder:
- Highlight the Folder.
- Hold down the left mouse button and drag the Folder to the new location. When dragging a Folder to a new location hovering over an object (Cabinet, Drawer or Folder) will automatically open the object allowing you to navigate to the proper destination.
- With the Drawer of the new location highlighted release the left mouse button.

Or use the Edit Menu on the Menu Bar to cut and paste to a new folder. If your a DocuXplorer administrator you can select multiple folders at a time

When moving Folders, the documents contained therein are moved with the Folder. When Folders are moved between Cabinets and the Folder or the documents contained therein previously exist in that Cabinet, DocuXplorer recognizes any changes to the stored documents or their indexes. You are then given the choice of updating the original document or creating a new document from the edited document. A dialog box will show that the Folder has been edited or changed by displaying the dates of modification for the source and destination documents as different. The dialog box will ask you to choose to update that Folder or not.

Folder Options

The source folder "CHECK PAYMENT" already exists in is this cabinet. Do you wish to update the destination folder properties?

Source Folder:

Caption:.....: Check Payment
Modified on: 3/25/2020 6:50:43 AM
Modified by:

Destination Folder:

Caption......: Check Payments
Modified on: 3/27/2020 7:50:21 AM
Modified by:

| Yes | Yes to All | No | Cancel |

Tip:

- Moving a Folder will move all the documents contained in it.
- DocuXplorer defaults to a limit when moving Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of data locks allowed.
- A user with permission can move more then 254 documents by highlighting the documents to be moved.
- Folders inherit their permissions from their parent unless they have been specified as a parent object themselves. When a folder that is inheriting its permissions from a parent is moved it will then inherit the permissions of the new parent

Rename a Folder

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To change the name of a folder
- Select the object to rename.
- Click F2

Or

- From the right-click mouse menu, click Rename.
- Type the new name, and press ENTER.

Or use the Edit Menu on the Menu Bar to rename a folder

Tip:
- A name can contain up to 125 characters, including spaces.
- A Folder name can not contain single or double quotation marks.

Folder Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:

To view or change Folder properties:
- Highlight the Folder icon on the Library Tree
- Right click and select Properties on the drop-down menu

The Folder Properties dialog contains items; it is where users can edit Folder Properties.

General

General Properties

Folder ID - this item is the unique ID number given to this folder. This item can not be edited and is used by tech support to determine folder identification

Permission ID - this item is the permission set ID either set in this object or inherited by it from a parent object

Database ID - this item is the unique ID number given to the database storing this folder. This item cannot be edited and is used by tech support to determine database and folder identification

Connection Path - this item provides information on the location and connection path for this folder. This item cannot be edited and is used by tech support to determine database and folder identification

Accessed - the date and time this folder was last accessed

Modified - the date and time this folder was modified

Created - the date and time this folder was created

Document Count - the number of documents contained in this folder

Auto Indexing Variables - In this field, you can customize user-defined auto index variable that will override the index sets defaults. A user-defined variable is simply a customized location to store information. In the cases below, the user-defined variables that can be customized are specific to the index sets.

For example, if you use {FolderName} as the default index value for your subject field, but in one particular folder you want to automatically have a different value appear, you would enter {FolderName}=My Name. Now, when you add a document, the subject field will show "My Name" instead of the default name of the folder.

This feature can also be used with auto incremental numbers that are unique for different folders. Just enter in {MyVar}={+100+) into each folder's "Auto Indexing Variables" field (found in General Properties) and assign {MyVar} to your index set's field properties under the column labeled "r;Use this value as value when adding a new document." Now, each folder will have its own auto incrementing values.

Finally, this feature can also be used if you want to use the same value as the last value entered for the selected folder. You would simply enter in {MyVar}=Last entered data, into the folder's "r;Auto Indexing Variables" field and then assign {MyVar} to your index set's field properties under the column called "r;Use last entered value when adding a new document." This will automatically put the last entered characters into the index set.

see User Defined Variables for more information.

Folder
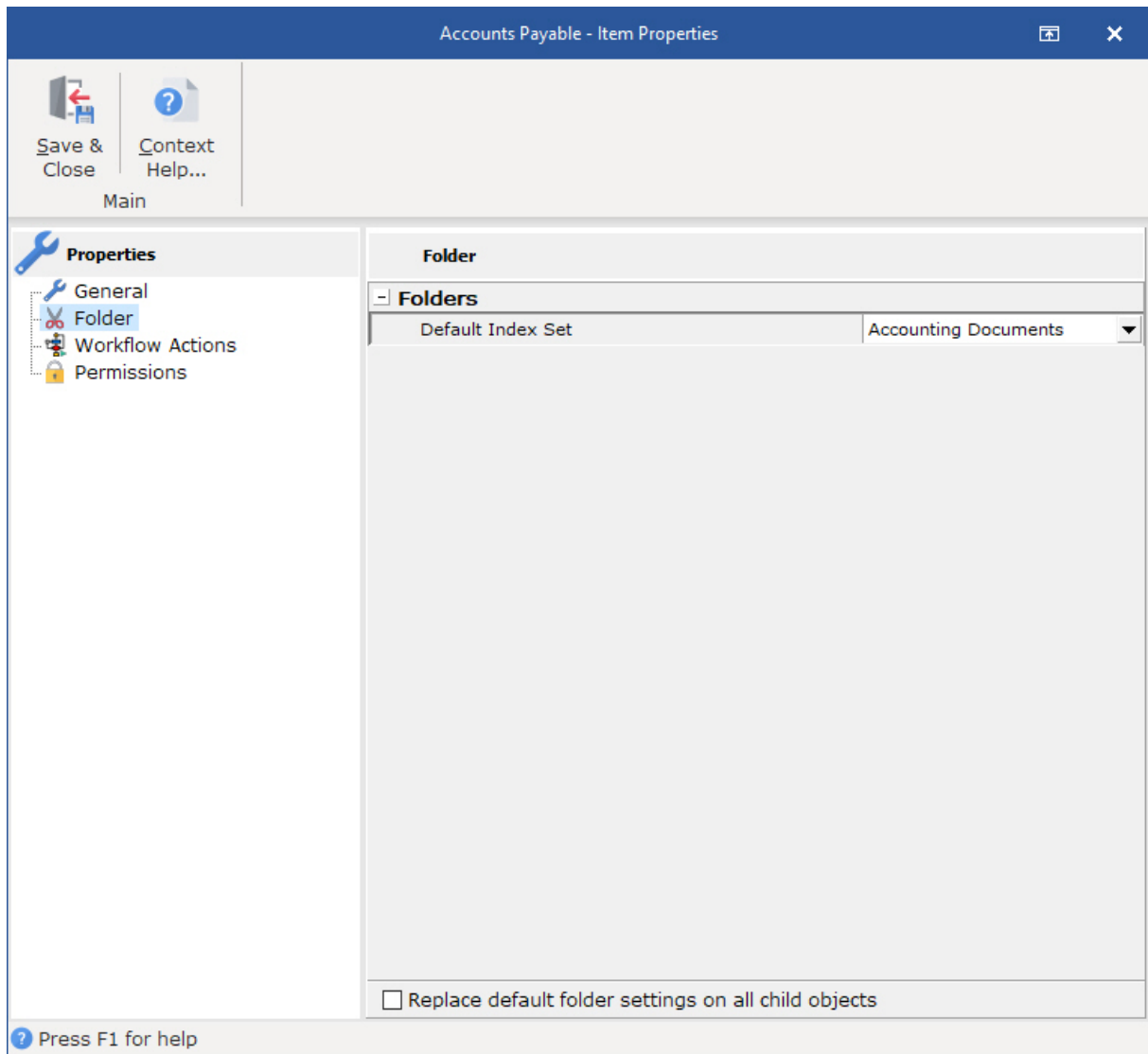
Default Index Set - The Folder's Default Index Set can be selected from the drop list.

Replace default folder settings on all child objects - checking this box will change the default Index Set on all child objects.

Permissions - security is not available in Personal or Small Business
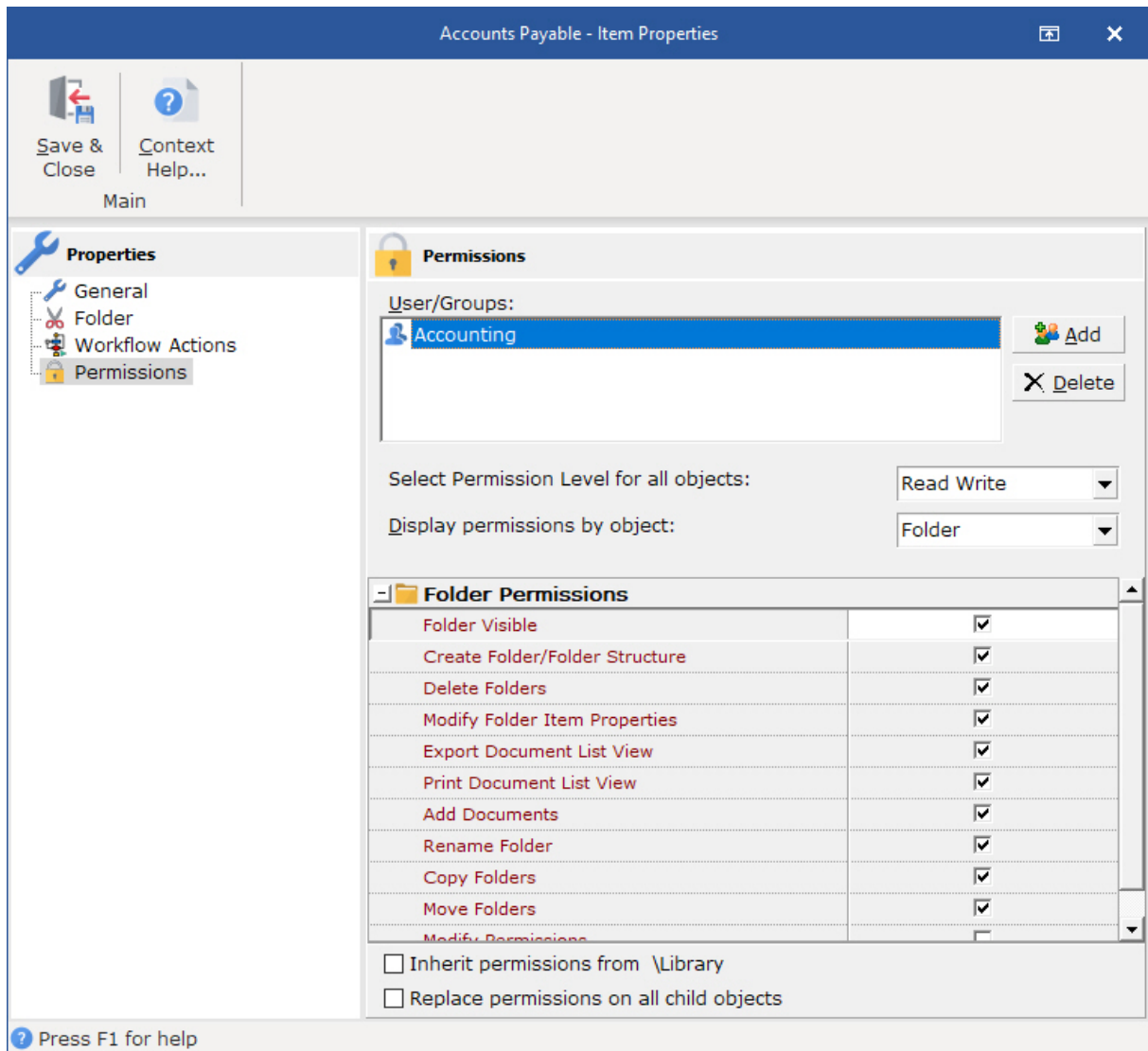
Permissions allow you to add users and groups and set security properties for users and groups for the Folder

- See the Security/Users/Groups help item for more information on how to add users and groups to a Folder.

- See Security/Folder Permissions for more information about setting Folder permissions.

Tip:

Permissions are generally inherited from the Library. To change permissions for the Folder object you must uncheck the Inherit permissions from parent box before setting new permissions for users or groups.

Document List View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Folder Contents Window of the desktop provides a list of the documents contained in a Folder.

From right-click menus the window provides users with the ability to use the functions of DocuXplorer specific to that object in focus. Right-click menus are available from the Column Head Bar, a highlighted document, or an empty space in the Document List View.

Tip:

You can navigate the document list view by highlighting a field to search. Enter a letter and selection will move to the next document that starts with that letter in the focused field.

The display of documents in a Document List View is determined by the Folder Contents Display Filter located on the Icon Toolbar. To see all the documents contained in a folder select All Documents from the Folder Filter List on the Icon Toolbar. If All Documents is selected as the filter, only the fields assigned to the All Documents Index Set will display on the Icon Toolbar. The index information displayed for a document when using the All Documents Index Set filter will be the data attached to the document's assigned Index Set.

Tip:

It is recommended that Folders be defaulted to an Index Set and all documents stored in a folder be associated with the Folder's default Index Set.

It is also recommended that the Subject Field entry be descriptive of a document's contents so that when in the All Document display mode you can distinguish between documents. If you choose to export a document to a Windows Folder the data entered in the Subject will become the exported file name.

The Column Header Bar in a Document Contents List is used to set up and modify an Index Set by adding and removing fields and changing the display order. The Column Header Bar for a folder will display the fields and properties assigned to the selected Index Set.

Index Set View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The Index Set view is a drop-down list that determines which index should be used for the documents in the selected folder. It is found on the Toolbar when a Folder has been selected.

The Document Filter affects the display of the current Document List View.

Choosing an Index Set from the Folder Filter drop-down list will cause the folder to display only documents with that Index Set assigned to them. The Column Header Bar for the folder will display the fields and properties assigned to the selected Index Set.

To see all the documents contained in a folder select All Documents from the Folder Filter List. If All Documents is selected as the filter, only the fields assigned to the All Documents Index Set will display on the Column Header Bar. The index information displayed for a document when using the All Documents Index Set filter will be the data attached to the document's assigned Index Set.

Tip:

It is recommended that Folders be defaulted to an Index Set and all documents stored in a folder be associated with the Folder's default Index Set.

It is also recommended that the Subject Field entry be descriptive of a document's contents so that when in All Document display mode you can distinguish between documents..

The Index Set as a Default Folder Property

Index Sets can be assigned to a folder as a default property. When a folder has an Index Set Default Property assigned, it will automatically filter the display so that only documents with that Index Set assigned to them will display. When adding documents to a folder with the Index Set Property, the Document Window that opens will automatically display the default index set. The default Index Set is determined by the settings of the parent object the Folder is inheriting its

properties from. Users can change the Index Set Property assigned to a folder from the [Folder Properties dialog box](#).

Column Header Bar

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The **Column Header Bar** of a folder is the key to the <u>Folder Contents List</u>.

Invoice Processing									
Accounting Documents									
From	Document Type	Document Date	Comment	Status	/ Page	Size Kb	Created	Modified	Editor
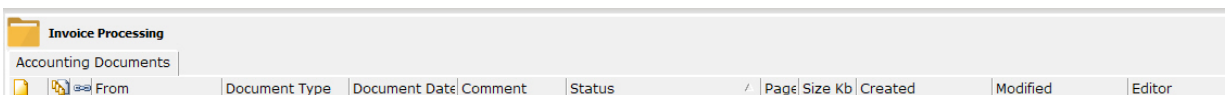
- Change the display of a Document List View using the Column Header Bar by dragging and dropping fields from their present location to a new one on the bar.
- Expand the Column Header Bar down to show two lines of index fields.
  - o To open an additional line on the bar place your cursor at the bottom of the Column Header Bar and drag it down to open.
  - o You can move fields into the space created to display two lines of index fields.
  - o If two lines of index information are displayed for individual documents each document will be defined by alternating colors to make it easy to determine which index data defines a particular document.

Note:

Changes to the column header bar are changes to the Index Set being displayed and will be inherited in all folders defaulted to display that Index Set.

Column Header Bar right-click Mouse Menu
- The right-click mouse button will bring up a menu that will allow users with permission to access the many functions of the **Column Header Bar**.
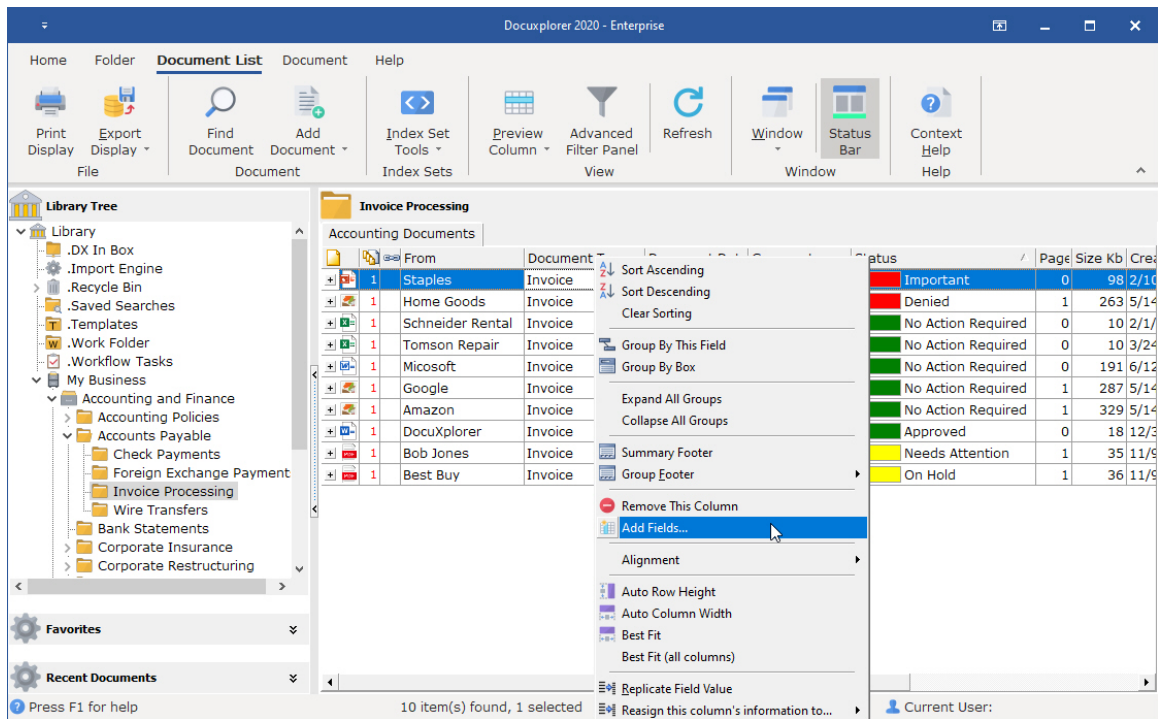
Sorting

- Sort Ascending – Sort the Active User List in ascending order based on the current column's values.

- Sort Descending – Sort the Active User List in descending order based on the current column's values.

- Clear Sorting – Clear the sorting and return to the unsorted state.

Grouping
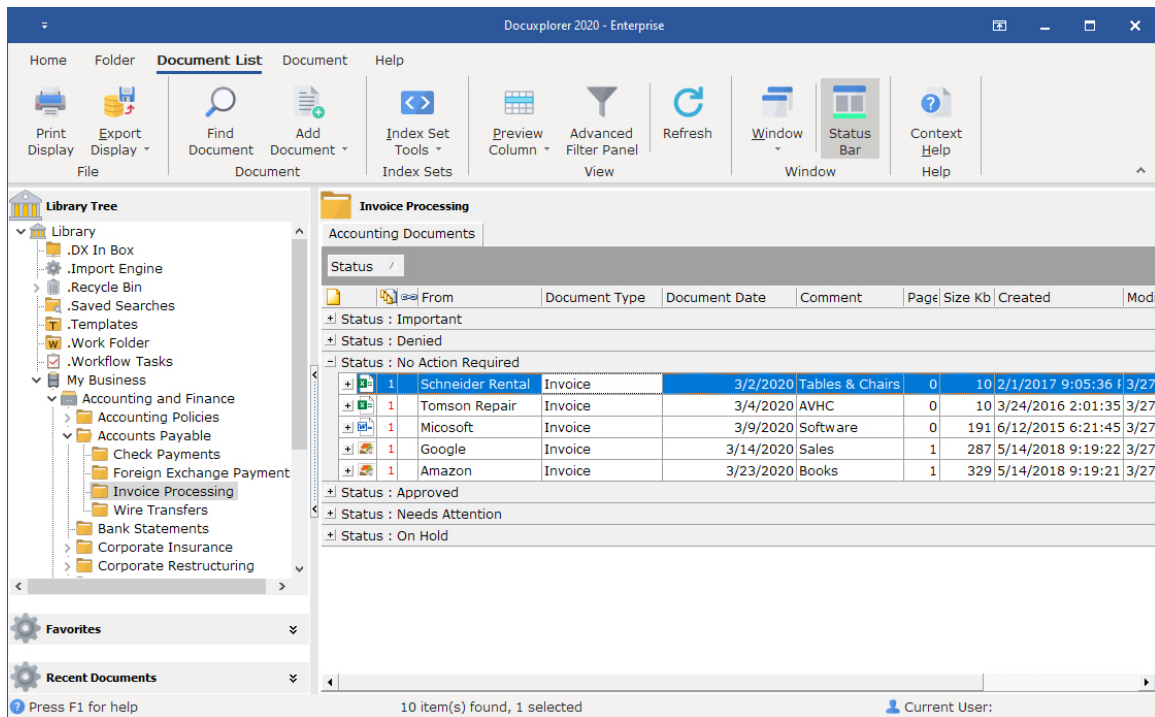
- **Group by This Field** – This feature automatically opens the Group by Box and inserts the selected field. The display is then grouped by the data entries in a Folder or Query List View. Users can then select additional fields to add to the Group by Box and create sub-groupings. Groupings and sub-groupings can be pivoted in the Group by Box by dragging and dropping the field buttons into a different grouping order. When finished with creating groups and sub-groups close the Group by Box by clicking the item Group by Box.

- **Group by Box** – The menu item will show or hide the Group by Box.

- **Expand All Groups** - This menu option expands all groups defined by the feature above.

- **Collapse All Groups** - This menu option collapses all groups defined by the feature above.

Summary Footers
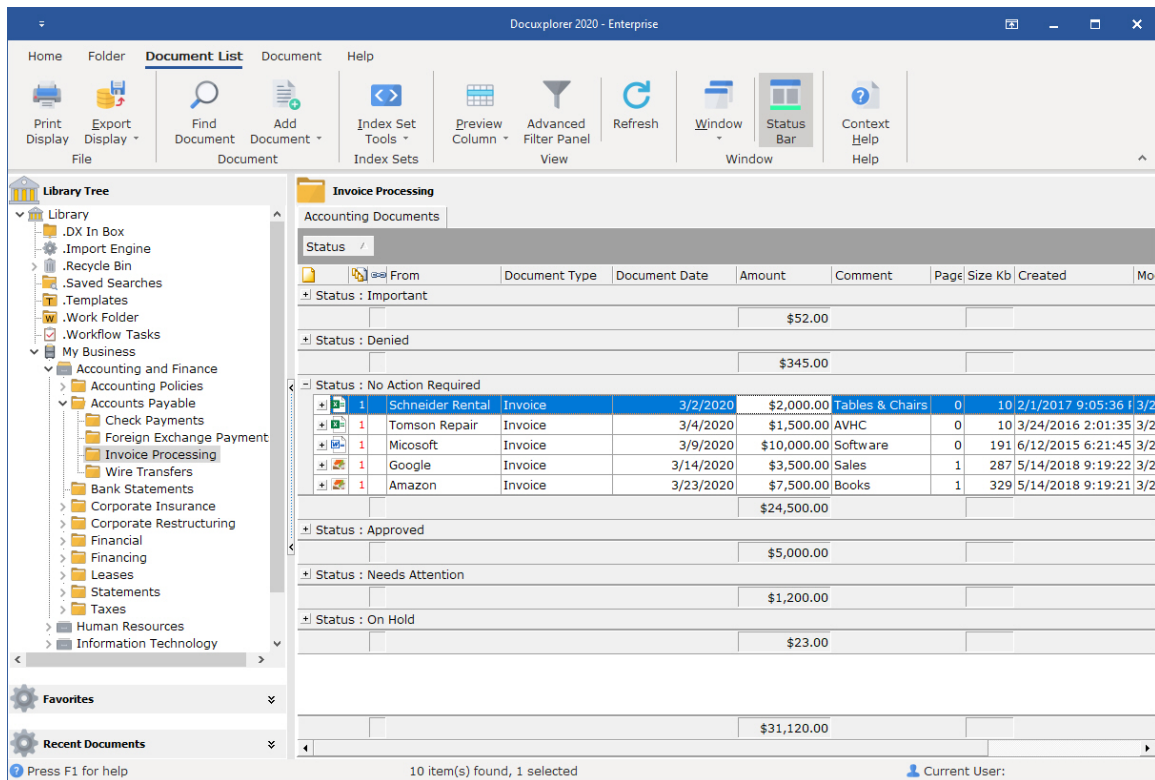
- Summary Footers - Summary footers allow you to create summary calculations for a field.

- Summary Group Footers - A user can select to display a summary group footer for each group or subgroup. Summary Group Footer display can be set to display Always, Never, or When Expanded, select your choice from the drop-down menu associated with Summary Group Footer..

Add and Remove Fields from Column Header Bar

- Remove this Column (Field) – Removes the currently selected column (Field) from view. Removing a column from the column header bar also removes the field from display in the Document Window. The column (Field) with all its properties intact can be re-added to the display by dragging and dropping it back onto the Column Header Bar from the Add Fields dialog. The removed field will display in the Add Fields dialog by the display name that was modified

- Add Fields - Allows the user to add fields to an Index Set and display on the Column Header Bar.

Alignment
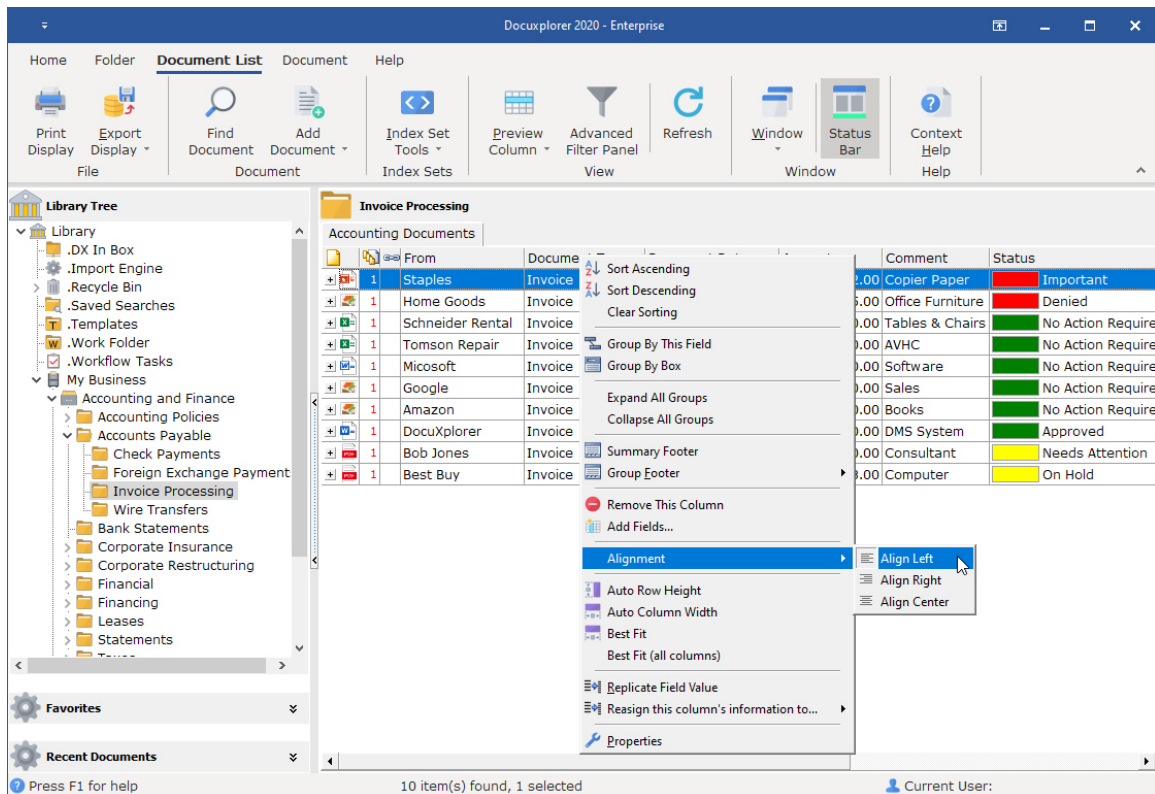
- Alignment – The information contained within a field can be Centered, Right Aligned or Left Aligned.
- Auto-Column Width – Automatically adjust the size of each column to its largest entry.
- Best Fit - Automatically change the selected column's width to fit the largest entry
- Best Fit (All Columns) - Automatically change the column width of all columns to fit the largest column entry

Replicate Field Value

- Allows a user to replicate a field value across multiple fields in the Document List View

Reassign this columns information to…

- Allows a user to reassign the information in a column to another column in the same Index Set

Edit Data in Document List View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer allows you to edit index field data in the Document List View without opening the Document Window.

To Edit data in the Document List View:
- Select the field to edit
- press F2 to open Edit Mode in the Document List View Window
- Type in your edits
- press F2 to close Edit Mode

Tip:

When in edit mode if the line is yellow it can be edited by the user, if the line is red the record is read-only by being checked out or locked by security.

Print Display

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Print Display command available from the File Menu allows a user to format printing from the grid to create user-defined reports.

Tip:

- Users can format printed reports of the Document List View from the Print Preview Window available from the Print dialog box.

- Access to the Print or Export Display in the Query List View can managed via the Library permissions.

Export Display

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Found on the <File> menu when the contents of a folder is highlighted. This function allows users to export the display list of a Folder Contents List or Search Results List.

Export files can be formatted as either Excel, XML, Comma Separated Value (CSV) or HTML files. Exported Excel files can be edited using Microsoft Excel. HTML files can be viewed using your web browser. To edit an HTML file you will need an HTML editor program. CSV files can be edited or viewed with Notepad or any other text editor.
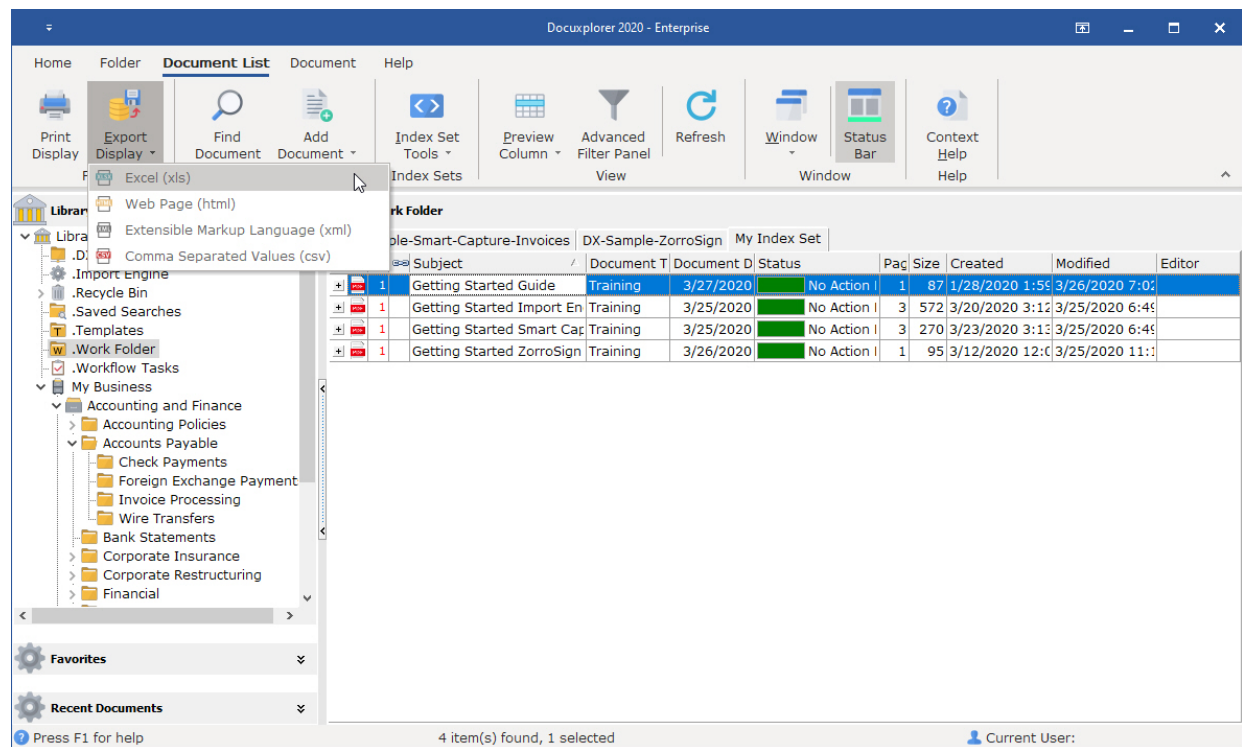
To export a display list;
- Select the display data to export, to select all, right-click in the Folder Contents List and choose Select All from the drop down menu or use the keyboard shortcut Ctrl+A
- Click on the <File> menu item Export Display To

- Select the file type you would like to export
- From the Save File dialog box choose a location on your hard drive to place the file
- Type in a name for the file you are creating
- Click Save
- Choose to view the exported list if desired.

Tip:

- Exported lists can be used to generate editable and printable reports.
- If you have added a [Summary Footer](#) to a Contents or Search Results List the Summary Footer will be exported along with the list of documents
- Create lists of specific documents to export by selecting only those documents you need
- Use the Ctrl and Shift keys to select specific documents in a folder just as you would in Windows Explorer
- Print or Export Display in the Query List View is an administrator only function.

Sorting the Document List View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Sorting lists of documents is accomplished using the Folder Contents Window .
The column titles in the list view represent a field in an [Index Set](). By clicking on
a column title you can sort the list in either ascending or descending order.

To sort the contents of a Folder:
- Click the left mouse button on the column title; the database will sort on that column.
- One click and the column will sort in ascending order.
- Click again and it will sort in descending order.

Or
- Right click the column title to bring up a drop-down menu
- Select either Sort Ascending, Sort Descending or Not Sorted

Tip:

To sort by multiple columns hold down the Shift key to select multiple columns in a sort.

Replicate Field Value

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

The Replicate Field Value allows users to replicate a specific field value to many fields simultaneously.

This function is valuable when adding documents to folder using the Batch Scanning process. When batch scanning documents only the subject field and fields with an auto-indexing variable will be populated. Often these empty fields need to filled with the same value (i.e. a date) Replicate Field Value allows you to enter the data once and automatically have it replicate in any fields selected during the replicate process.

To replicate a field value:

- Highlight the documents to receive the value
- right-click the Column Header Bar to bring up the drop down menu
- Select Replicate Field Value
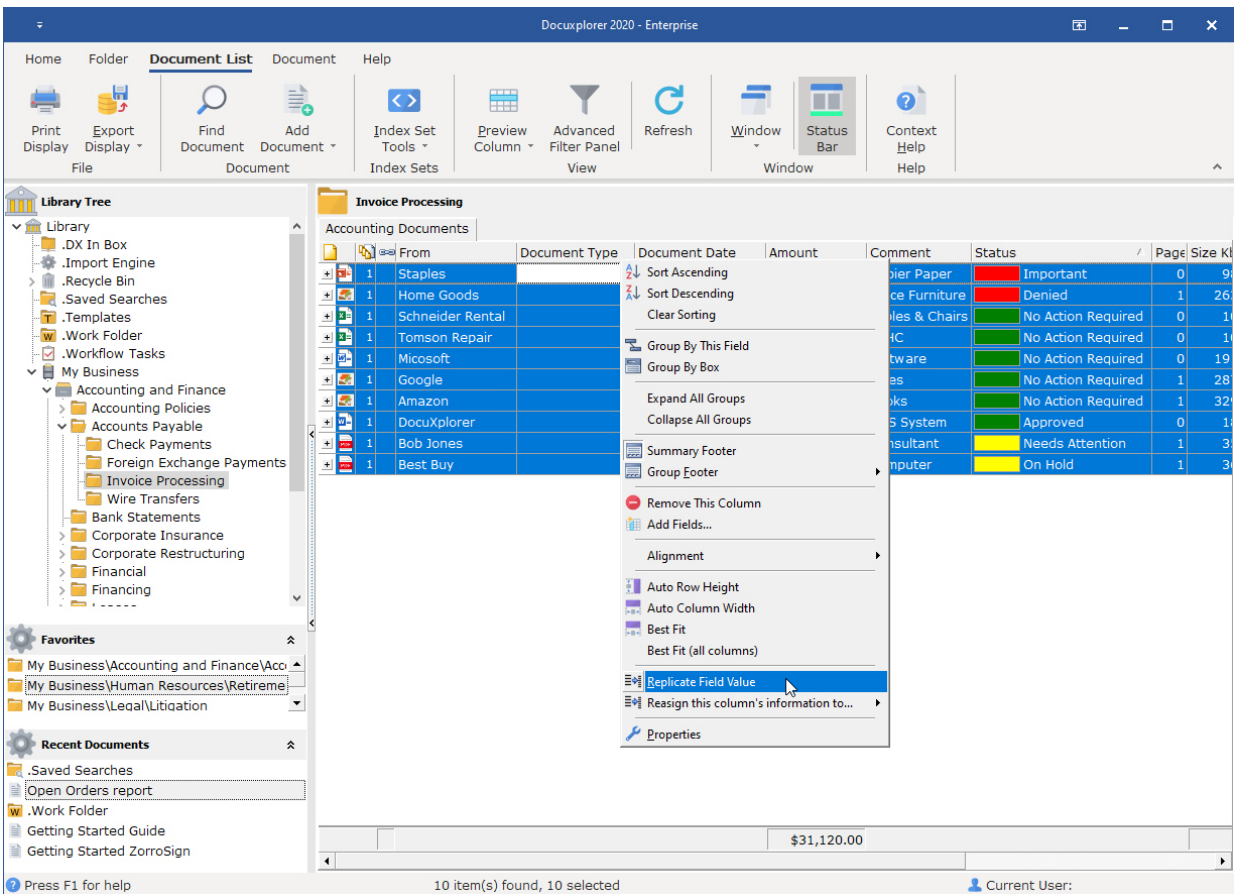
- The value to be replicated will display in a dialog box, click OK if the value is correct

Reassign this column's information to...

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The Reassign this column's information to... function is an administrator only function that allows the values of a field within an Index Set to be moved into a different visible field in the same Index Set.

Reassigning the information in a column moves the data from one field column in an Index Set into another field column. The administrator selects the destination field from one of the visible user-defined fields associated with the Index Set. The administrator can choose to overwrite existing data with reassigned data or fill only blank fields with reassigned data. On completion of the reassignment the data is emptied from its original field.

To reassign the information in a column:
- Right click Document List View Column Header Bar directly over the field with the value to be reassigned

- Select Reassign this columns information to
- Select from the list of fields available to accept the reassigned values
- Click Yes on the confirmation screen to proceed with the reassign
- Choose to overwrite the existing data, if you select No only the blank fields will filled with the reassigned data

Tip:

A reassign will move all the index data assigned to each document in that Index Set into the field selected to accept the reassigned data. Reassignment can not be Undone and a backup is recommended before attempting the reassignment.

The Reassign column information function is based on a Cabinet and will only affect documents in that Cabinet. If you wish to reassign all the documents associated with that Index Set in other Cabinets you will need to repeat the process in each Cabinet.

Modify an Index Set - Add, Remove or Modify a Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Modify an [Index Set](#) from the [Column Header Bar](#) of the [Document List View](#).
right-click the Column Header Bar to display a menu to Add or Remove Fields and change [Properties](#).

To Add a Field to an Index Set:

Select the Add Fields item from the right-click menu on the Column Header Bar to bring up a dialog box with a list of all the fields available to add to the Index Set.

DOCUXPLORER

Add Fields	x
Columns	
Currency Field-01	
Currency Field-02	
Currency Field-03	
Currency Field-04	
Currency Field-05	
Date Field-02	
Date Field-03	
Date Field-04	
Date Field-05	
Integer Field-02	
Integer Field-03	
Integer Field-04	
Integer Field-05	
Memo Field-01	
Memo Field-02	
Memo Field-03	
Memo Field-04	
Text Field-01	
Text Field-03	
Text Field-04	
Text Field-05	
Text Field-06	
Text Field-07	
Text Field-08	
Text Field-09	
Text Field-10	
Text Field-11	
Text Field-12	
Text Field-13	
Text Field-14	
Text Field-15	
Accessed	
Checked out by	
Date Checked Out	
Document ID	
Document Viewer	
Export File Name	
Index Set Name	
Maximum Versions	
Reason Checked Out	

The fields in the list consist of user-definable fields (Currency, Date, Integer, Text String, and Memo) and system default fields that cannot be changed. Drag and drop the field to add directly to the Column Header Bar. Move the field to its display location by dragging it into place on the Column Header Bar. right-click the newly added field and click Properties to change the field's properties.

The system default fields include;

> Accessed - the date and time the document was last accessed
>
> Checked Out By - the user who has checked out the document
>
> Date Checked Out - the date and time the document was checked out
>
> Document Viewer - displays the document viewer associated with the document
>
> Export File Name - displays the user-defined file name that will used when the document is exported from DocuXplorer or attached to an e-mail.
>
> Index Set Name - displays the name of Index Set associated with the document
>
> Maximum Version - displays the maximum number of versions that can be created for the document
>
> Reason Checked Out - displays the memo note added when a document is checked out
>
> Size Bytes - displays the size of a document in kilobytes

Tip:

Users might find that adding a system field such as Accessed, with the date the document was last accessed may be valuable in sorting and searching for documents in a folder. For instance, if you were looking for all the documents in a folder that were accessed today you could sort the Document List View by the Accessed field to easily find those documents.

To Remove a Field from an Index Set:

Drag and drop the field off the Column Header Bar. The field is then replaced on the Add Fields dialog with its new display title and available for use and modification again.

To Modify the Properties of a Field:

right-click the field in the Column Header Bar of the Document List View and select [Properties] from the menu.

Tip:

- By default an Index Set's properties: users, groups and permissions are inherited from the object where it is created.
- The Subject Field in an Index Set can be modified but not deleted
- The Subject Field of any Index Set will always be visible when a [Folder Contents List Filter](#) is set to display "All Documents" in the Folder it should always be filled with data relevant to identifying that document

Grouping Documents in a Document List View

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

A group in DocuXplorer is a set of documents that has common data in a field - such as invoices from the same vendor or contracts due on the same date. Group documents to see related items together, similar to an outline. You can expand or collapse the group headings to display or hide the documents they contain.

Groupings are associated with an Index Set. A Folder that has been defaulted to a specific Index Set will inherit the Group setting for that Index Set.

To Group documents in a Folder:

- Right click the field to group by in the [Column Header Bar](#)

Or

- Right click the Column Head Bar and select [Group Box](#)
- From the Column Header Bar drag and drop a field to be the first level of the grouping

- Add additional fields as sub-groups

Groupings can be changed by dragging the field into a new position on the Group By Box.

To expand grouped documents:
- Click on the plus sign next to that group

To change grouping hierarchy in a Folder:
- Drag and drop the field to move it higher or lower in the hierarchy of the Group By Box

To remove a Group in a Folder
- Drag and drop the field back to Column Header Bar

Grouping by a Date Field

Grouping by a Date Field allows a user to select the grouping display by one of the following formats.

Select a grouping type from the drop down list in the Date Field's Property dialog box..
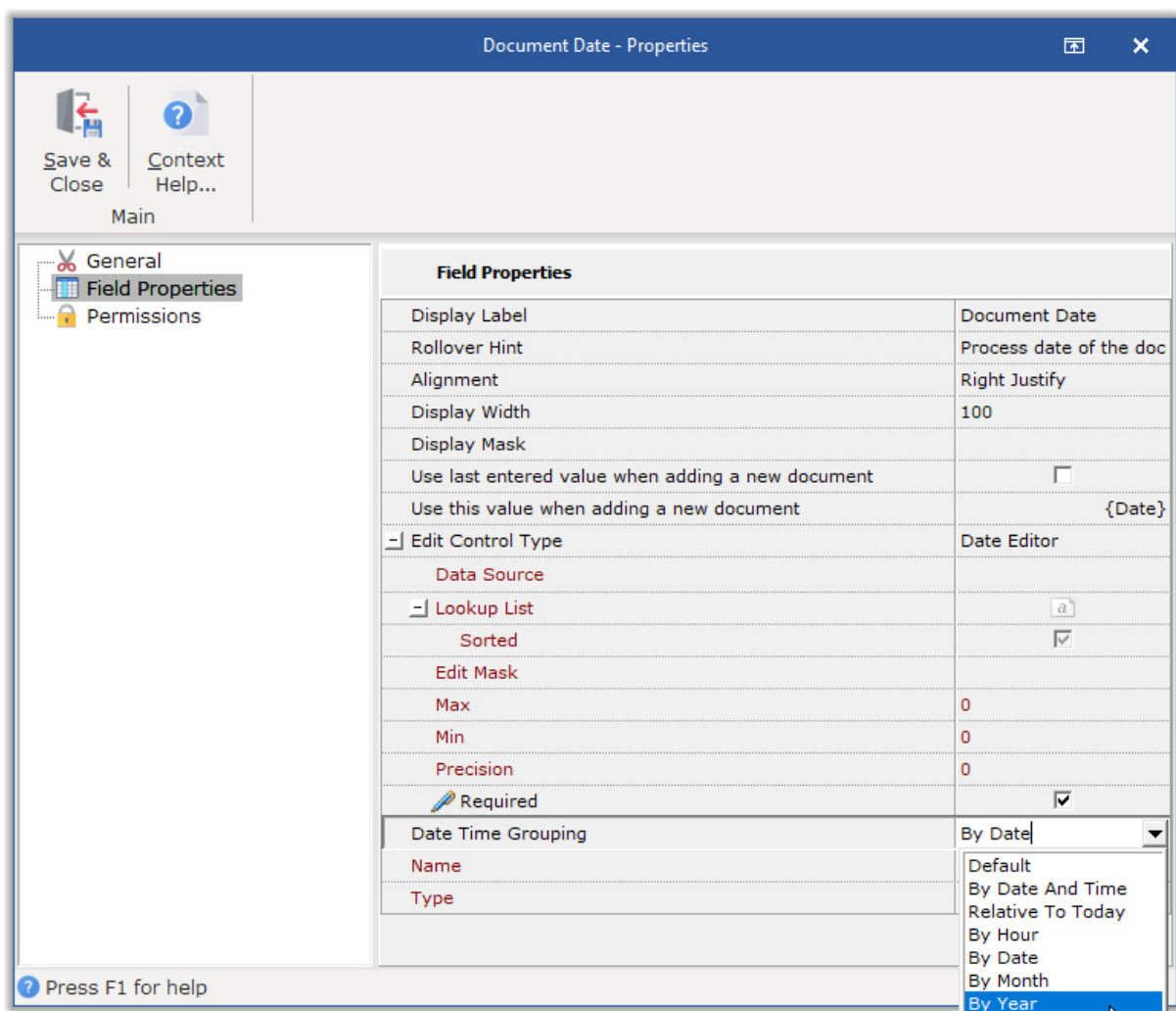
Default - displays documents in a folder or query list grouped by the heading Today, Yesterday, This Week, This Month, This Year, Last Year or if older than last year by the document date.
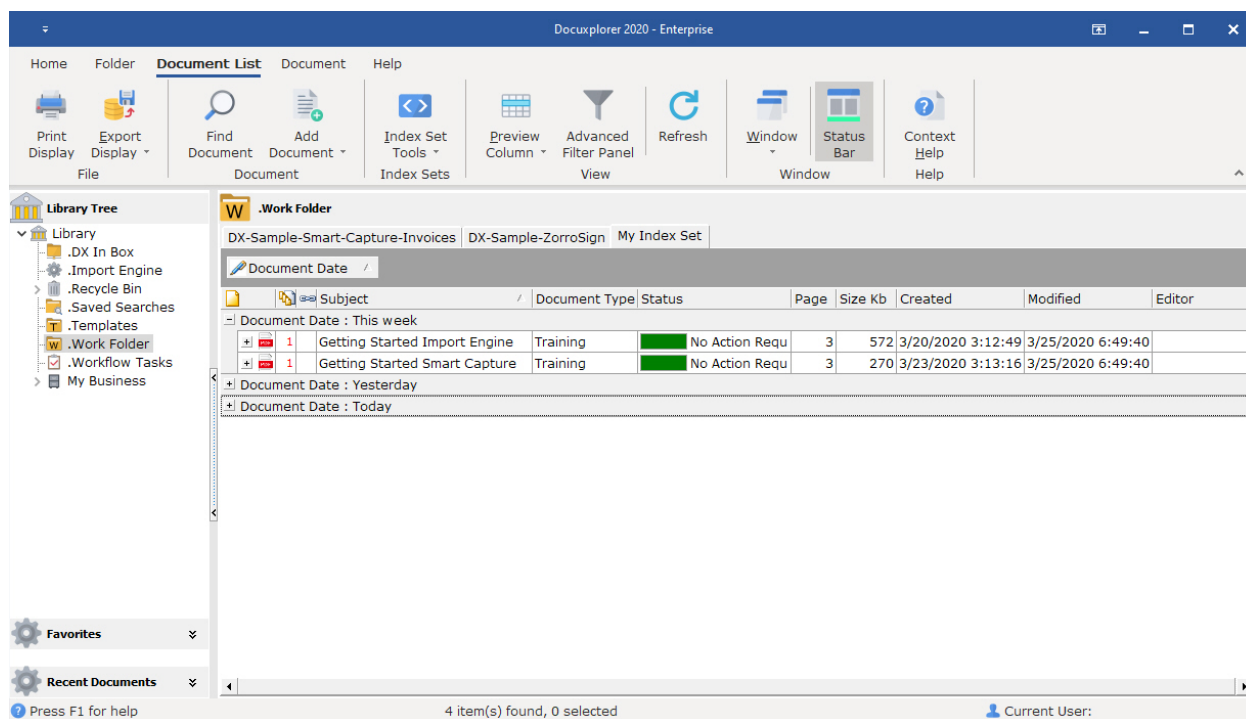
By Date and Time - To display by both Date and Time the Date Field. Time grouping will be supported in a future update. At present all time will display as 12 AM.

Relative to Today - displays documents in a folder or query list grouped by the heading Today, Yesterday, This Week, This Month, This Year, Last Year or if older than last year by the document date. See image above.

By Hour - This is to be supported in a future update. At present all time will display as 12 AM.

By Date - displays documents in a folder or query list grouped by the date entered into the Date Field (for example, 08/08/09).

By Month - displays documents in a folder or query list grouped by the Month and Year entered in the Date Field (for example, 08/08/09 would display as August 2009)
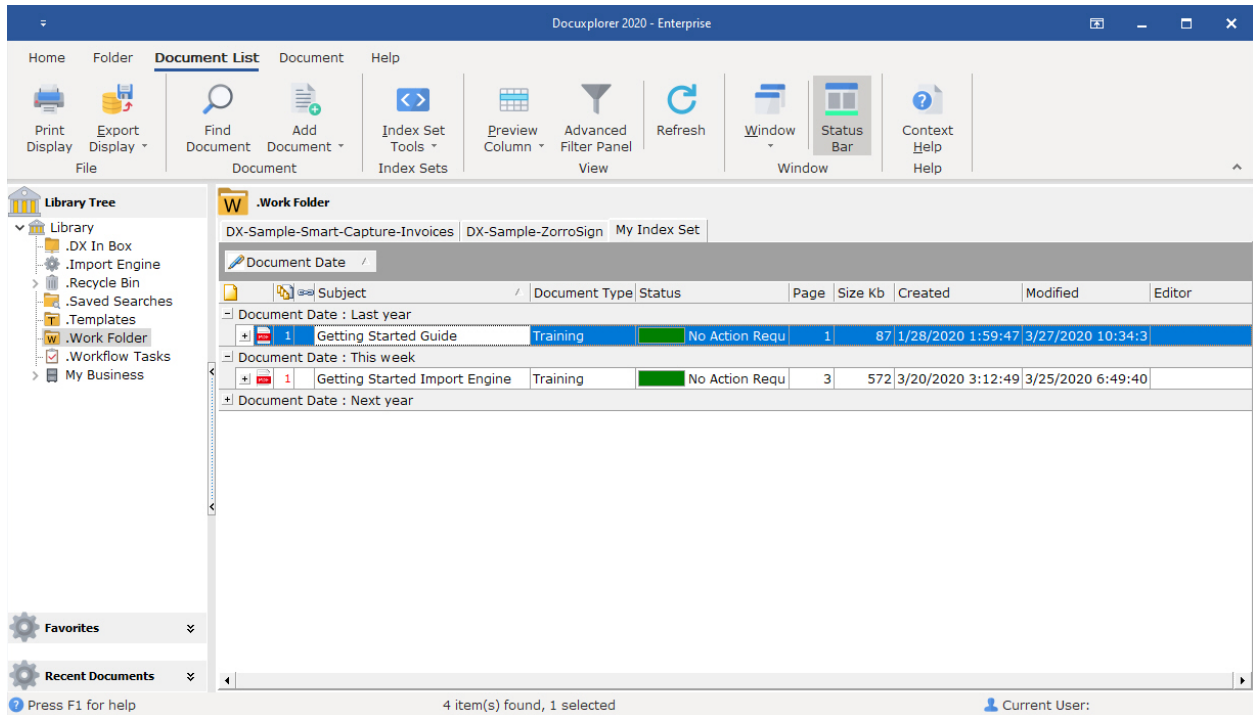
By Year - displays documents in a folder or query list grouped by the Year based on the date entered into the Date Field. (For example, 2009)

Tip:

- This is a powerful feature that will allow you to easily see groups and subgroups of documents together. You can also create [summary footers](#) by group or subgroup to see totals, counts, minimums, or maximums of specific data fields. These groupings can then be [exported to Excel or HTML](#) to create reports.

- Fields used to Group By can be re-added to the Column Header Bar so that they display as a group as well as a column in the Document List View. To re-add the field open the Add Fields dialog box and drag and drop the Grouped By field back onto the Column Header Bar.

Group-by-Panel

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Group Panel is used to create groupings and sub groupings.
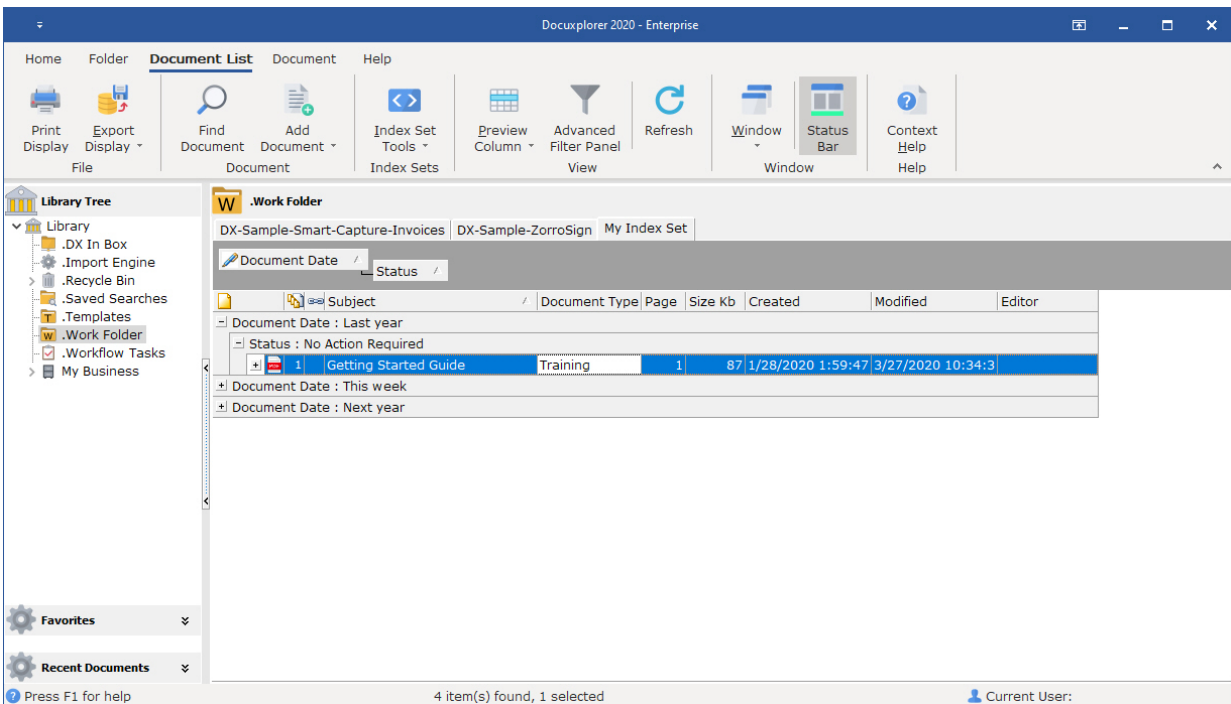
To create a Grouping, drag a field off the Column Header Bar and into the Group Panel. Repeat this process to create sub groups for other fields.

Change the group order by dragging a field to another level in the group order in the Group Panel.

To remove a group simply reverse the process by dragging the field back to the Column Header Bar.

Align the Contents of a Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the Column Header Bar right-click drop-down menu a user can align the
data in a field left, right or centered.

Auto Column Width and Best Fit

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

From the Column Header Bar right-click drop-down menu a user can automatically size all fields for the available screen size, best fit for a specific field or all fields to its Best Fit.

- Auto Column Height will re-size by either stretching or collapsing the columns height to match the data contained in a row
- Auto Column Width will re-size by either stretching or collapsing all columns to fit within the available screen size.
- Best Fit for a Field will automatically change the field width to fit the largest entry
- Best Fit for All Fields will automatically change the field width of all fields to fit their largest entry

Tip:

Auto Column Width is applied only for the user who has selected the option and only for that specific session.

Summary Footer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Summary Footers allow you to create summary calculations for a field. A user can also select to display a summary footer for each group or subgroup.

To display a summary footer for a group or subgroup right-click the group header bar and select Summary Footer. To remove the summary footer from a group click the group header bar and uncheck Summary Footer.

Select the type of Summary Foot to create by using the mouse right-click the footer display area under the index field to calculate.

A summary calculation for a field can be;

  sum - the total of all numbers in the list
  min - the smallest number in a list

max - the largest number in a list

count - a total of the number of items in the list

average - the average of all numbers in the list.

In the same way a user can set Summary Footers on groups of documents as well as the entire folder. See the image above.

Once set, a Summary Footer will display until it is removed. The Summary Footer will be automatically updated when documents are added or data is changed.

Index Field Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Index Field Properties display information about the field and on user-defined fields allows you to modify the field to fit your needs. These modifications to field properties provide a user with the ability to quickly and accurately enter index data with minimal effort. Administrators can also set field properties to require data entry for a field to assure the document will always be properly indexed.

Set up user-defined Index Field Properties from the Field Properties dialog box. Access Field Properties by right clicking on the field to be modified to bring up the drop-down menu of the Column Header Bar.

General

The General Properties fields contain information about the Field. Only the Description Field is editable and can be used for memo information.

Field Properties

To set up Index Field Properties:

- Type in the fields display name
- Type in a Field Rollover Hint. Field Rollover Hints are used to give information about a field and are presented under or near the field's header as you move the cursor over the header. The hint will appear for a short period of time. Rollover Hints can as a default be turned on or off in <Tools><Options><Workstation>.
- Set the alignment with the drop down list
- Set Display Width (in pixels)
- Set Display Mask (for Integer and Currency fields only) - choose from the drop down list of existing masks or create custom display masks
- Check the Required box if data entry is required before document can be saved to the Library

Tip:

If you have selected Required for a field an icon will automatically display with the field display name to let a user know that data entry for that field is required and cannot be saved to the Folder unless entries are made.

- Set Minimum Value (for Integer and Currency Fields only)
- Set Maximum Value (for Integer and Currency Fields only)
- Set Precision (the number of digits allowed to the left of the decimal point for Currency Fields only)
- Select a default for using the last data entered when adding new documents
- Check Required box if data entry is required before the document can be saved to the Library

Tip:

Using last data entered when adding documents will automatically populate the field with the last data entered for a document with the same Index Set. This default is useful when you are adding multiple documents from a source and you desire to have much of data in the index fields repeat itself each time a document is added.

Use this value when adding a new document

This option is used in conjunction with "Use this value when adding a new document"

When checked this option remember the last entered value and is maintain in the "Use this value when adding a new document" field described below. If a user defined variable is placed in the "Use this value when adding a new document" field below, the last entered value is maintained in the folder properties where the variable was defined. As a result each folder could maintain its own default values.

If more than one person is adding documents to the same folder, the last user to post their change will be the last entered default value to be stored.

Use this value when adding a new document

This function allows users to create an index field entry that will appear each time a document is added. Data entered this way is specific to an Index Set. Users can also enter an Auto-Indexing Variable to capture data associated with the variable chosen. Variables that can be used include Cabinet, Drawer or Folder Name, Today's Date, an incrementing serial number, and more.

Read-Only - selecting this default would prevent users from editing the value automatically added to the new document

Edit Control Type

- Choose an Edit Control from the drop down list. Field Controls Types include;
  - **Standard Text** - a field with data that would not be consistently reused
  - **Check Box** - to set up a True/False statement (i.e. a field labeled Approved with a check box would serve to indicate the document's status)
  - **Hyperlink** - The editor control type hyperlink can contain URLs ex. http://www.website.com, File links ex: file://c:\My Documents\document.xxx and email links ex mailto://Myfriend@emailaddress.com

- Static Data Lookup List - an auto-complete field with a drop down list that will consistently use a predefined data set
- Static Data Checked Lookup List - a list with check boxes to select a group of entries from a list of predefined data to a field
- Dynamic Data Lookup List - an auto-complete field with a drop down list that use a predefined set of data as well as automatically add new data to the data list. (i.e. a Vendor field where existing vendors are reused and new vendors are added as needed)
- Date - in a Date Field will display a date
- Date and Time - in a Date Field will display both Date and Time.
  - Choose or create a user-defined edit mask
  - If Look-Up List was chosen, populate the list by typing the specific information to display as a single line in the Look-Up Field Drop-Down List
  - Check Required box if data entry is required before the document can be saved to the Library

Tip:
- After the properties have been set for an Index Set field and data has been entered, changes to the properties of that field can result in unexpected or incorrect data display. A user must consider the existing data and how it will translate to a different Edit Control.
  - For example; if you change the Edit Control Type for a Text field from "Standard Text" to a "Check Box", the "Check Box" Edit Control displays as True or False in the form of a checked or unchecked box rather than text, none of the previously entered text would then display and any changes made to the field by checking the box would change the underlying column entry.
- If you change a field's Edit Control Type property to either a Static or Dynamic Edit Control, the current values in the field will NOT be added to the Static/Dynamic Lookup List automatically. You will have to do this manually.

Date Field Specific Properties

With Date Fields in DocuXplorer you can set a field to display both date and time or date only and set a specific method for grouping documents in a Folder or Query List.

To set the Date Field display for either Date only or Date and Time select the item from the Edit Control Type drop-down list.

To set a grouping methodology for a Date Field select an item from the drop down list.

Field Permissions - security is only available in DocuXplorer Enterprise and Professional

To set up Index Field security right-click the Index Field to work with and select Field Properties/Permissions.

Permissions allow you to add users and groups and set security properties for users and groups for the Index Field

- See the Security/Users/Groups help item for more information on how to add users and groups to an Index Field.

- See Security/Index Set and Field Permissions for more information about setting Index Field permissions.

Working with Documents

About Documents

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

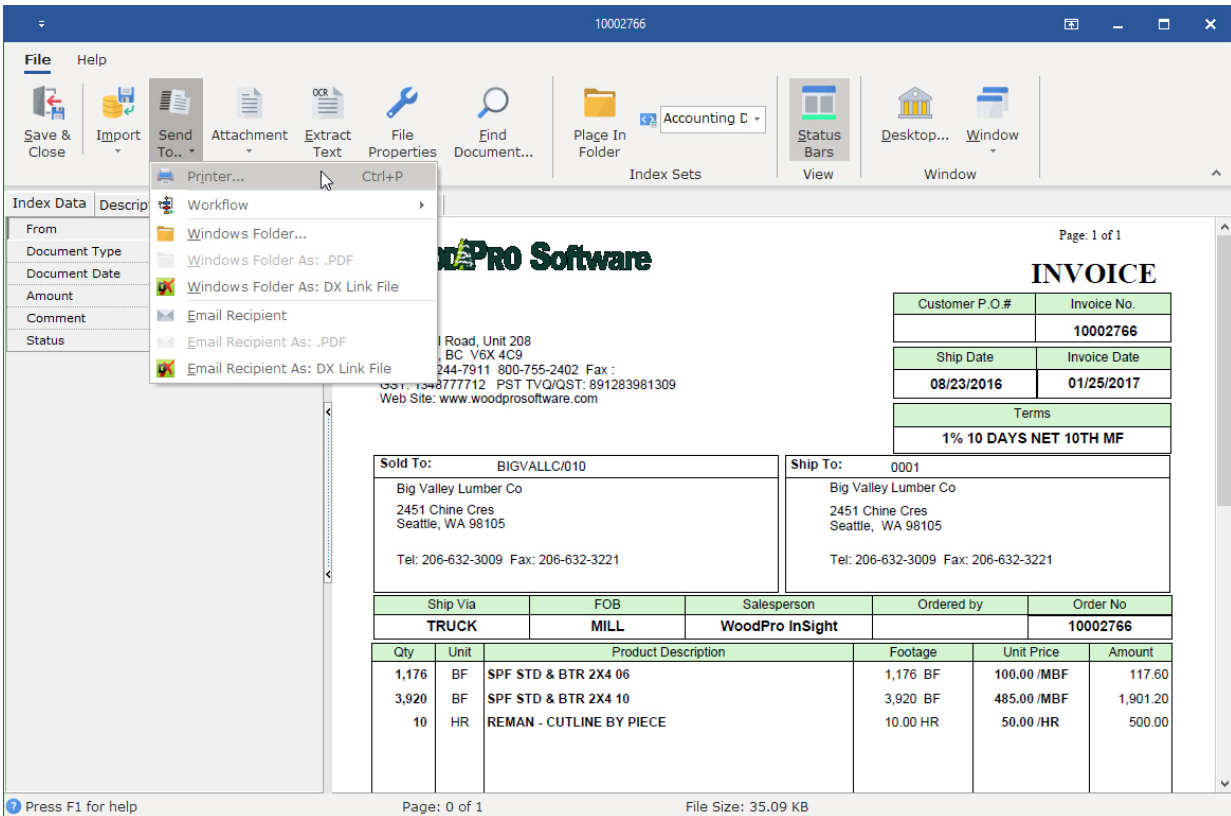A Document is the basic unit of data in the DocuXplorer filing hierarchy; it consists of index data with or without a document attachment. A document attachment can be either an image file or application attachment. An application attachment is a file that has been created by a computer application.

The three types of DocuXplorer document are Image Documents, Attachment Documents, and Index Information Only Documents.

Open Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop Document List View:

Image or Index Information Only Document

Double click an Image or Index Information Only document to open it for viewing and editing in the DocuXplorer Document Window.

Attachment Document

Double click an attachment document to open the document attachment's associated program (i.e. Microsoft Word, Excel, Acrobat, Acrobat Reader, etc.).

right-click a Attachment document to bring up a drop down menu where you can choose to open either the document attachment's associated program or the Document Window to edit index information or delete the document attachment or import a different document attachment.

Note:

DocuXplorer supports the ability to import most PDF documents that have been password protected. The full version of Acrobat is required to password protect PDF documents created using DocuXplorer.

Tips:

- If a document attachment does not open with a double click try exporting the document attachment to a Windows Folder using the Send To command and opening it from Windows Explorer. If the document still does not open then you will need to use the document's native program to locate the exported document and open it. If the document does not open using Windows Explorer the issue is with the document's native program, not DocuXplorer - try reinstalling the document's associated program to reset the file association in the Windows Registry.
- It is recommended that no more than 5 documents at a time are opened in a workstation. If you open 6 or more documents you will be asked if that is really what you want to do.

Edit Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

From the DocuXplorer Desktop, Document List View:

To edit document index information;
- Open the Document View Window
- Enter index data modifications

Or

- From the Document List View, highlight the document to edit
- press F2
- Select field to modify index data
- Enter index data modification

Tip:

The highlighted record will change to yellow if a user is allowed to edit index data, or red if the document is checked out, or if the user does not have permissions to edit index data.

To edit a document attachment;

Image or Index Information Only Document

Double clicking on this type of document will open it for viewing and editing in the Document Window.

Tip:

Only image document attachments may be edited in the DocuXplorer Document Window.

Attachment Document

Double clicking on this type of document will open the document attachment's associated program (i.e. Microsoft Word, Excel, Acrobat Reader, Acrobat, etc.) to view and edit the document.

Tip:

Attachment documents cannot be edited in the Document Preview
Window. You will need the full version of Adobe Acrobat to edit PDF
documents.

Send To

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Use SendTo to output a document to a printer or file, or as an email attachment.

On the DocuXplorer Desktop, the right-click menu of a document provides access to the Send To menu.
To send a document use the mouse to select the document. To send multiple documents, use Shift or Ctrl to select multiple documents.

In the Document Viewer, the Send To menu is a submenu of the File menu.

The seven available options are:

Printer Device

This will send the document a printer device for printing. Users will be shown a list of printer devices available. Most often this is the method used for faxing documents as well, the fax driver is one of the listed print drivers.

To Batch Print documents from either a Folder or Query List simply highlight the documents to be printed and use the Send To/Printer Device command.

When printing from the Folder or Query List View annotations are automatically printed on the document. If you wish to print without annotations open the Document Window and use the print function to print without annotations.

Workflow

This assigns the select document(s) to an existing workflow definition

Windows Folder...

This will bring up a Windows Folder Tree to select a folder as a location for the exported documents. The destination folder can be anywhere on a network. The document or documents will be exported in their stored file

type. The export file name as user defined in the Index Set properties will identify the exported file.

Windows Folder As: PDF

This is the same as above but the document will be exported in PDF format. The export file name as user defined in the Index Set properties will identify the exported file.

Windows Folder As: DX Link File

This is the same as above but the document will be exported as a LinkFile. A LinkFile is a pointer to a document in the DocuXplorer desktop client. Clicking on a LinkFile will automatically open DocuXplorer and display the linked document. The exported file name is user defined via in the Index Set property called exported file name.

Windows Folder As: Hyper Link File

This is the same as above but the document will be exported as a hyper Link File. A Hyper Link File is a pointer to a document in DocuXplorer access over the internet. Clicking on a Hyper Link File will automatically open your web browser and display the linked document. The exported file name is user defined via in the Index Set property called exported file name.

Mail Recipient

The selected document or documents will be attached to the email with selected export file name identifying the attachment.

Mail Recipient As: PDF

This is the same as the Mail Recipient but DocuXplorer will convert the document attachment in the email to PDF. The export file name as user defined in the Index Set properties will identify the exported file.

Mail Recipient As: LinkFile

This is the same as the Mail Recipient but DocuXplorer will convert the document attachment in the email to be a LinkFile. A LinkFile is a pointer to a document in DocuXplorer. Clicking on a LinkFile will automatically open DocuXplorer and display the linked document. The export file name, as user defined in the Index Set properties, will identify the exported file.

Tip:

When using the Send To option with PDF and TIF files, the user will be prompted to provide the specific pages to include.

When using LinkFiles the user must have DocuXplorer installed on their local workstation and be able to access the DocuXplorer Library.

Lotus Notes users will need to install the Microsoft MAPI e-mail interface for Lotus Notes.

When Event Logging has been set to enabled a dialog box will appear requesting the name of the recipient(s). These entries provide an audit trail of persons e-mailed the document which can be viewed in the Document Event Log/Field Values text box. Enter the names and click OK to use your default e-mail program to send the document(s). The feature can be turned on in the <Tools><Options><Administrative> dialog box. Check the item Require User Description when e-mailing, printing, or exporting.

Merge Documents

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

With the DocuXplorer Print Driver installed DocuXplorer allows you to merge multiple printable documents into a single PDF document or multiple image documents into a large image document.

At least two documents must be selected or the Merge Documents menu item will be greyed out.

Note:

The merge process supports the DocuXplorer PDF Print Driver or Peernet e-TIFF 8.0 driver. The DocuXplorer PDF Print Driver is the default setting. The Peernet e-TIFF 8.0 driver is 3rd party software not supplied with DocuXplorer. Select the default print driver in Tools/Options/Workstation dialog box.
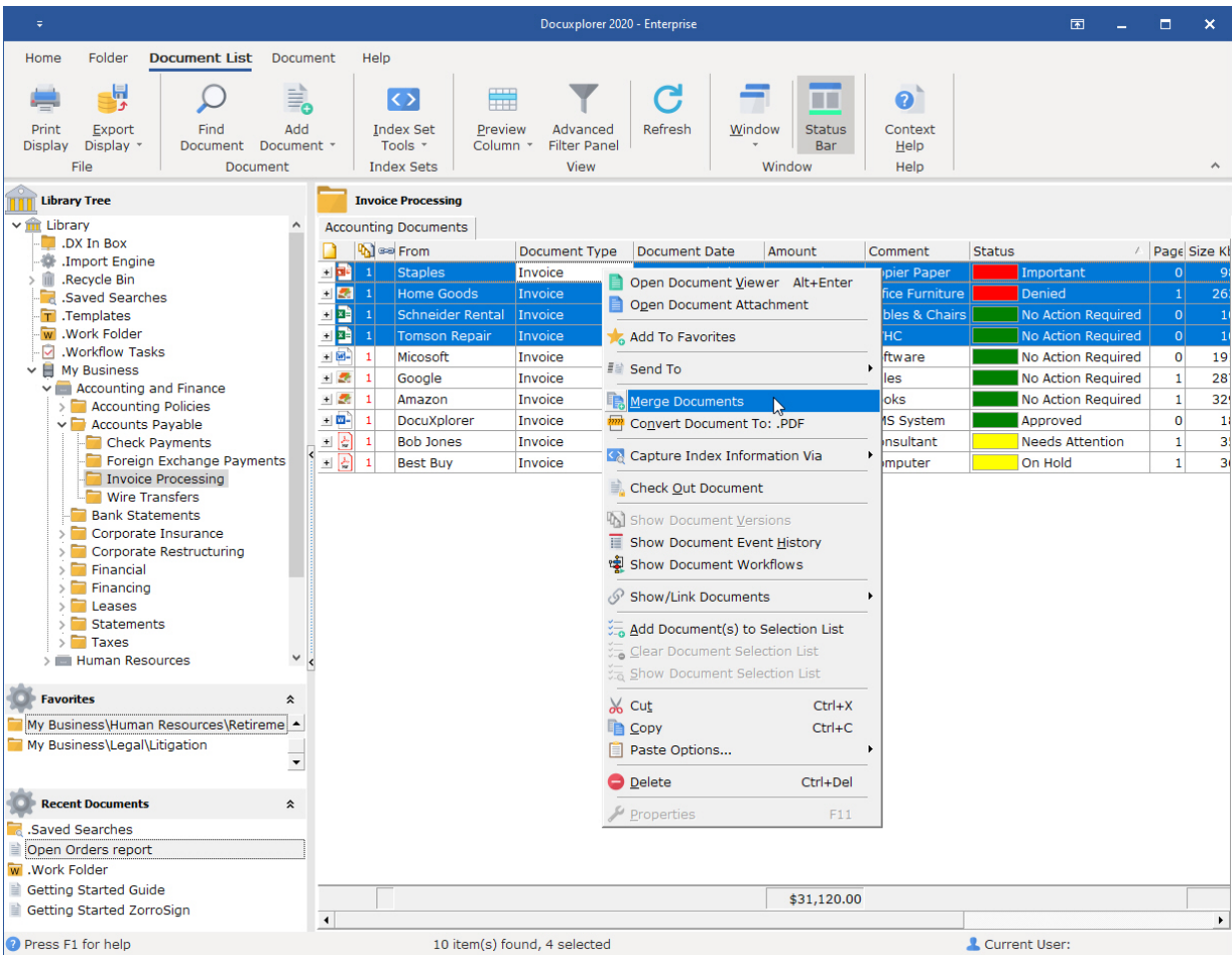
To merge documents into a PDF:

- Select the documents to be merged, you can merge any number of documents within the same folder or selection list in the Find Document dialog
- Right click to bring up a menu
- Select Merge Documents
- The Document Viewer Window open with document merged into a single PDF
- Select an Index Set to associate with the document and enter index data
- Select a location to save the document using Place in Folder
- Click Save and Close

Merging Documents to TIFF

When merging multiple TIFF image documents, the output will result in a TIFF document. If you have selected the TIFF Print Driver in Tools/Options/Workstation documents will be merged to a TIFF document.

Note:

When multiple types of documents are merged, DocuXplorer will open the document's associated application momentarily in order to run the PDF conversion process.

Convert Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

With the DocuXplorer Print Driver installed, the program allows you to convert any document printable from Windows Explorer to the listed format. The default format is PDF.

Note:

The conversion process supports the DocuXplorer PDF Print Driver or Peernet e-TIFF 8.0 driver. The DocuXplorer PDF Print Driver is the default setting. The Peernet e-TIFF 8.0 driver is a 3rd party software that is not supplied with DocuXplorer. Select the default print driver in **Tools/Options/Workstation** dialog box.
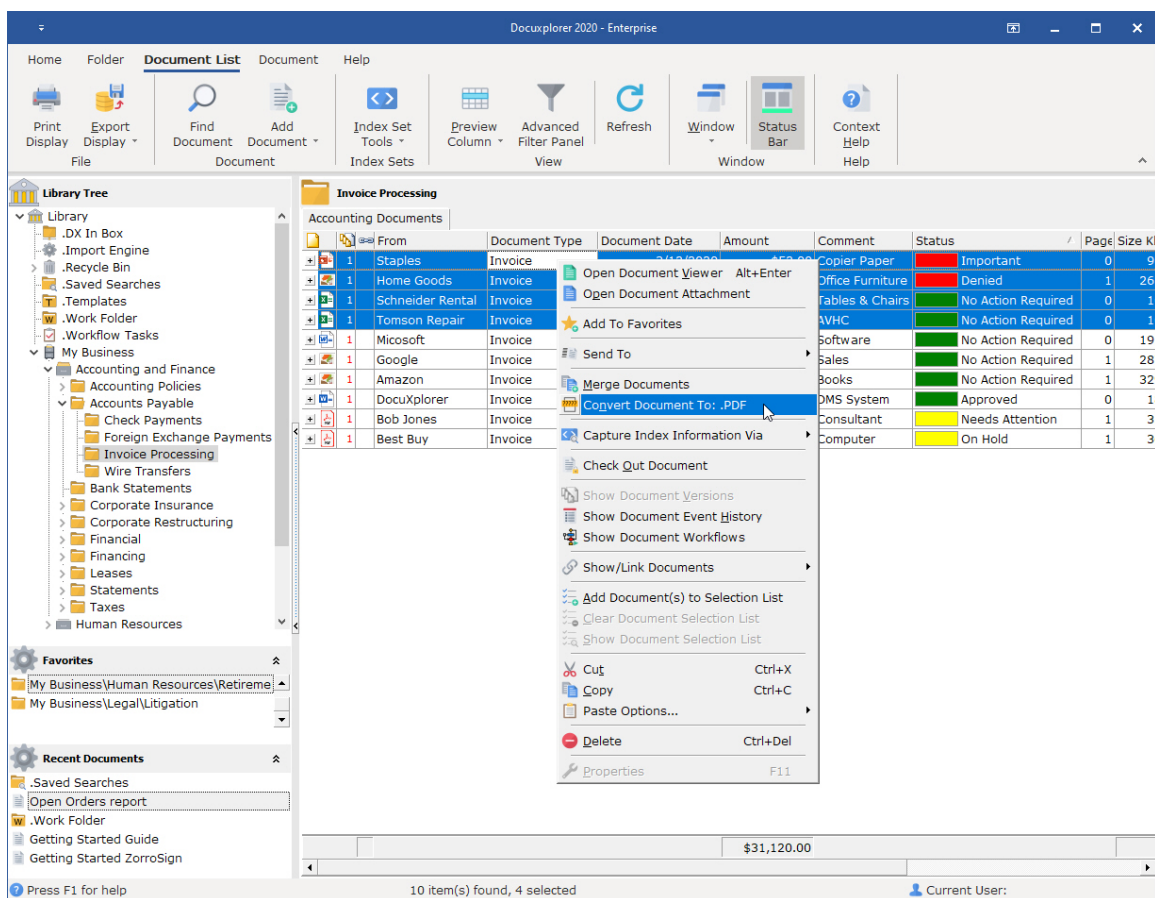
When converting MS Word documents to PDF via the DX Print driver, MS Word has to close before conversion.

To convert documents:
- Select the documents to convert
- Right click to bring up a menu
- Select Convert Document
- Choose if you wish to replace the original document with the converted copy or create a new document
- The documents will be converted and saved with their original index data

Check-in/Check-out

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Check-in/Check-out allows users with the permission to modify documents to reserve the right to modify a document. When a document is checked out a user with the permission to view or edit documents will still be able to view the document but will not be able to modify that document. The document must be checked in before another user with the permission to modify documents can open and modify that document.

When using document Check-out enter the date and time of return as well as any other details about the document to check-out. When another user attempts to access the document a dialog box displays memo information about when the document was checked out.

Once a document is checked out it cannot be copied, moved or deleted. The checked out document can be Read but not modified by any user other than the user who has checked out the document or an Administrator.

To Check-out a document:

From the DocuXplorer Desktop:
- Select a Cabinet/Drawer/Folder
- Select the document to Check-out
- Click the right mouse button to bring up the document menu
- Click Check-out Document
- Enter memo information and the approximate date and time of return into the dialog box text area
- Click OK
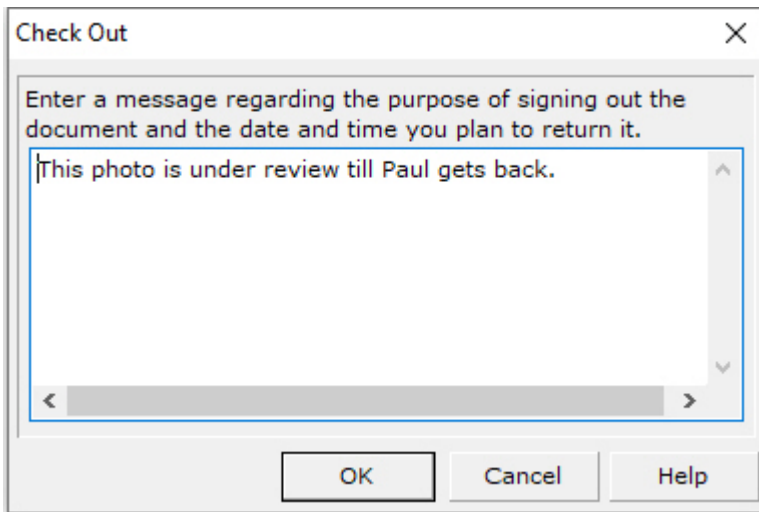
To Check-in a document:
- Select the document to check in
- Click the right mouse button to bring up the document menu
- Click Check-in Document

Tip:
- A user must have security rights to a document to check-out
- Users can set up check-in/check-out data for a document from its Document Properties dialog box
- Administrators can add Checked Out By and Reason for Check Out fields to an Index set display if this is an often used feature
- Associated Application documents while open in their native programs will be subject to the security permissions set in those programs, this may allow users to print or email documents from those programs
- Users can add the default field Checked Out By to any Index Set to track documents that are checked out and by the user who has that document checked out.

Versioning

This Help topic refers to the following editions:
☑ Enterprise ☑Professional
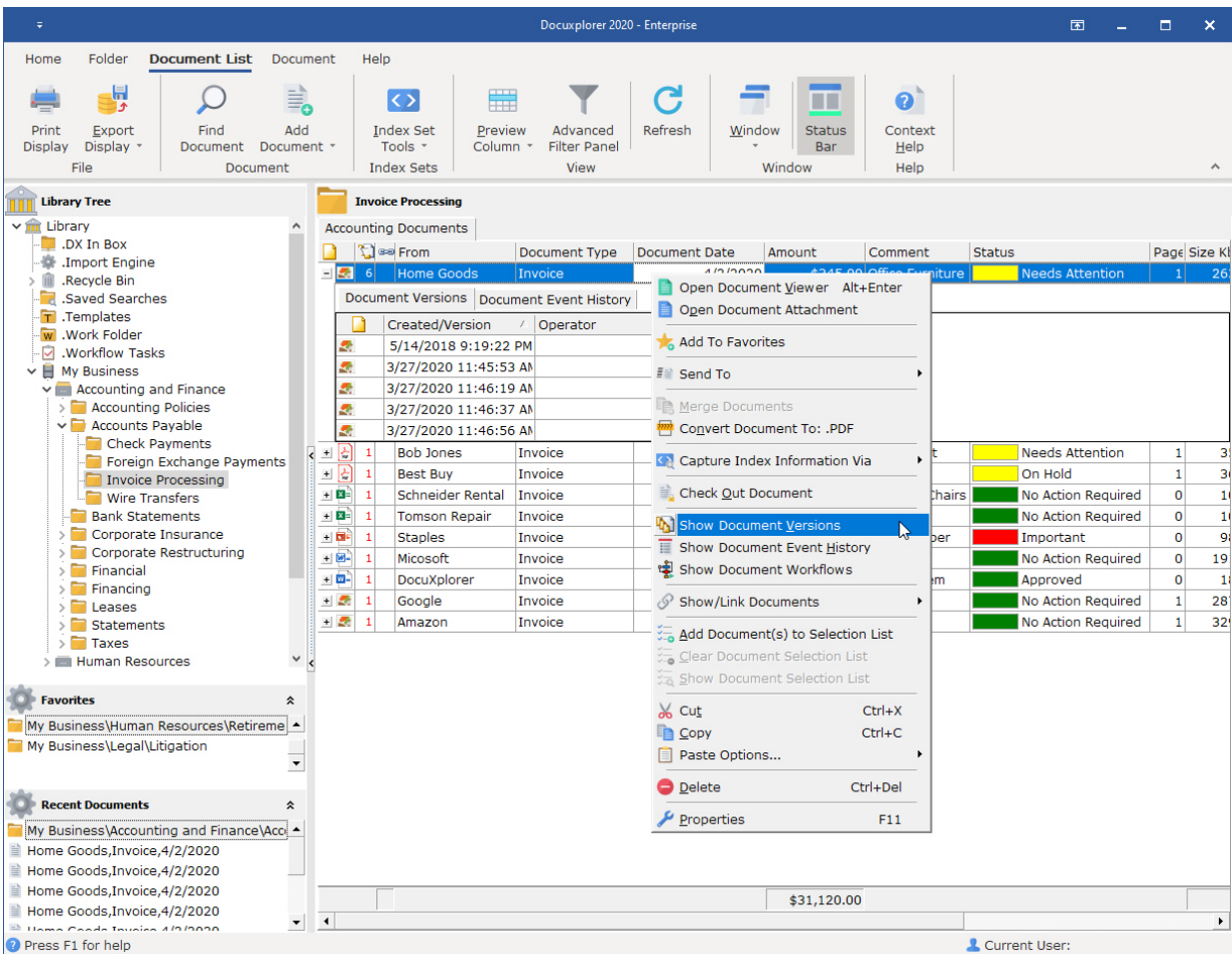
To access a document's versions:

- ▪ Highlight the document in the Folder Contents Window
- ▪ Click on the Plus Sign to the right of the highlighted line

Or

- ▪ Right click the document to bring up a drop down list and choose Show Document Versions

The versions of the documents will display in the Document Version Tab beneath the document record. Each version will be tagged with the Date and Time of creation and the name of operator who created that version.

Use the right click menu in the Document Version Window to manage the versions of a document.

DocuXplorer allows users to track revised versions of a document. Versioning can be set as a system default by the System Administrator from the <u>Home | Options | Document Defaults Tab</u>. Versions created in DocuXplorer are complete copies of a document with the new revisions to the document attachment.

To change the number of versions allowed as an <u>application default</u> :

- In the <Tools><Options> dialog select the Document Defaults item
- Change the Maximum Number of Versions Allowed number as desired
- Click Save and Close
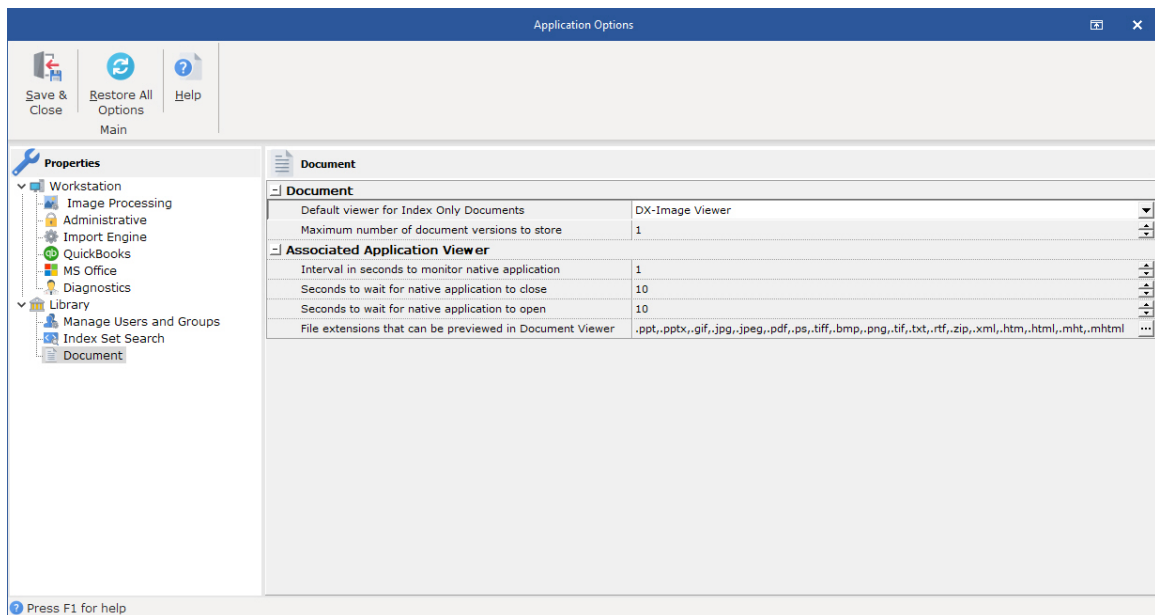
Tip:

Changing the global option to create versions affects only documents added after the change has been made. Previously stored documents require that you select the specific document and change its own property to allow for versions on that document.

To change the number of versions allowed for a particular document use the <u>Document Properties</u> dialog box:
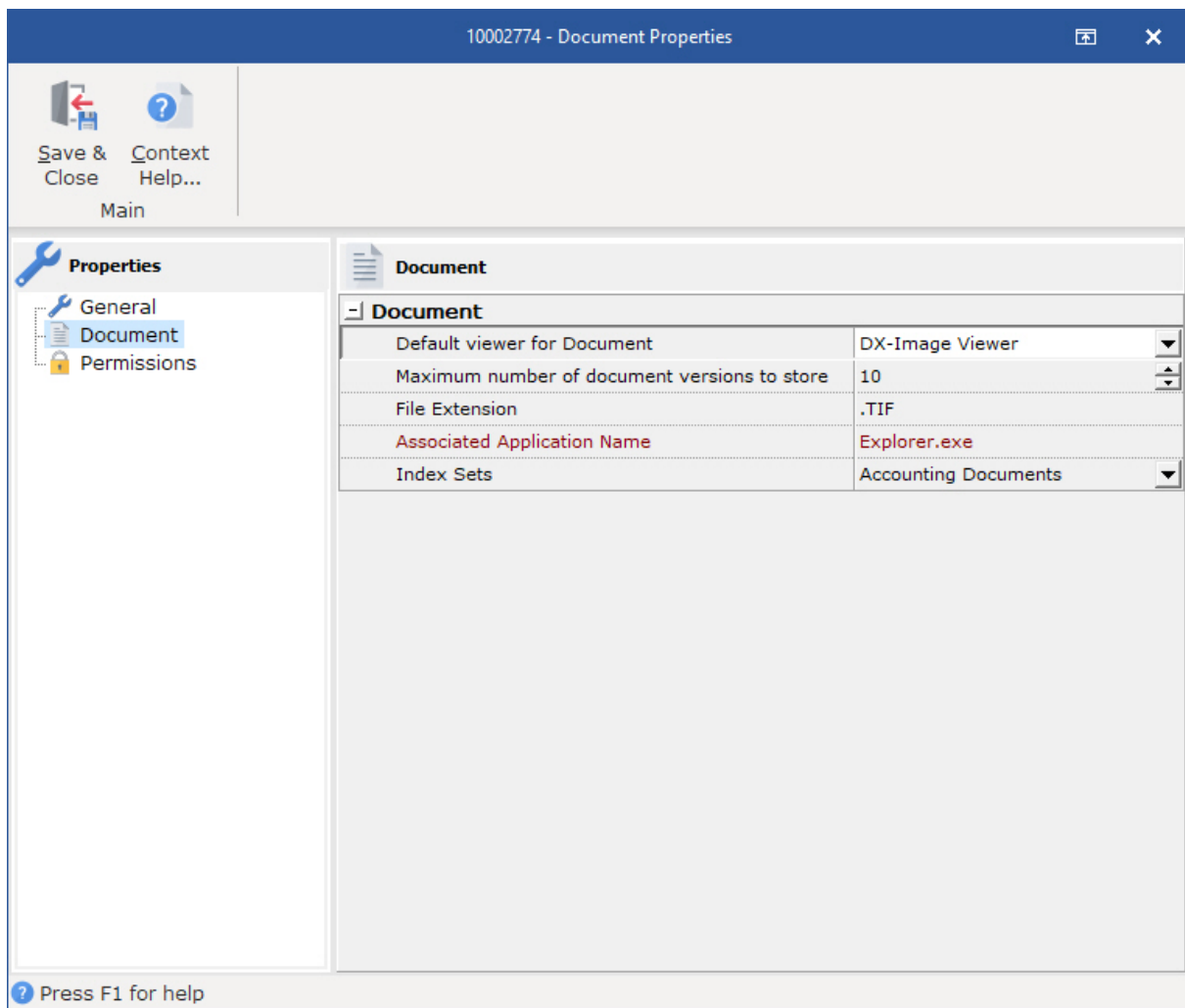
When the number of versions created has reached the limit you set, the oldest version will be deleted. If you do not wish to lose your original document then set the number of versions for the document to a high enough number so that it will not be deleted (i.e. set the number of versions to its maximum, 99 and delete middle versions so you never go beyond the 99 versions allowed for a document).

Convert any version on the list to PDF by selecting it and clicking on the Convert Document to: PDF item.

To go back to the normal view of the Folder Contents Window click "Hide Document Versions".

Deleting Versions

You can delete individual versions of a document from the Document Versions Window by right clicking on the document and choosing Delete from the drop

down menu. Deleting a document from the Document List View (the most recent version) will delete all versions of a document.

Deleted versions of a document are not moved to the Recycle Bin.

Deleting a document with versions from the Folder window will either delete or send all versions of that document to the Recycle Bin depending on the [properties chosen for that Cabinet](#).

Reducing the number of version allowed for a document

Since the "Max number of version to store" cannot be less then the number of existing document versions, you must first remove the unwanted versions before you reduce the number of versions allowed.

Tip:

When converting documents to a PDF in the Document List View that have multiple versions, only the latest version will be converted to PDF. The previous versions will be stored in their original format.

Document Event History

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

The Document Event History, available from the document right-click menu, consists of a list of actions taken on the document.
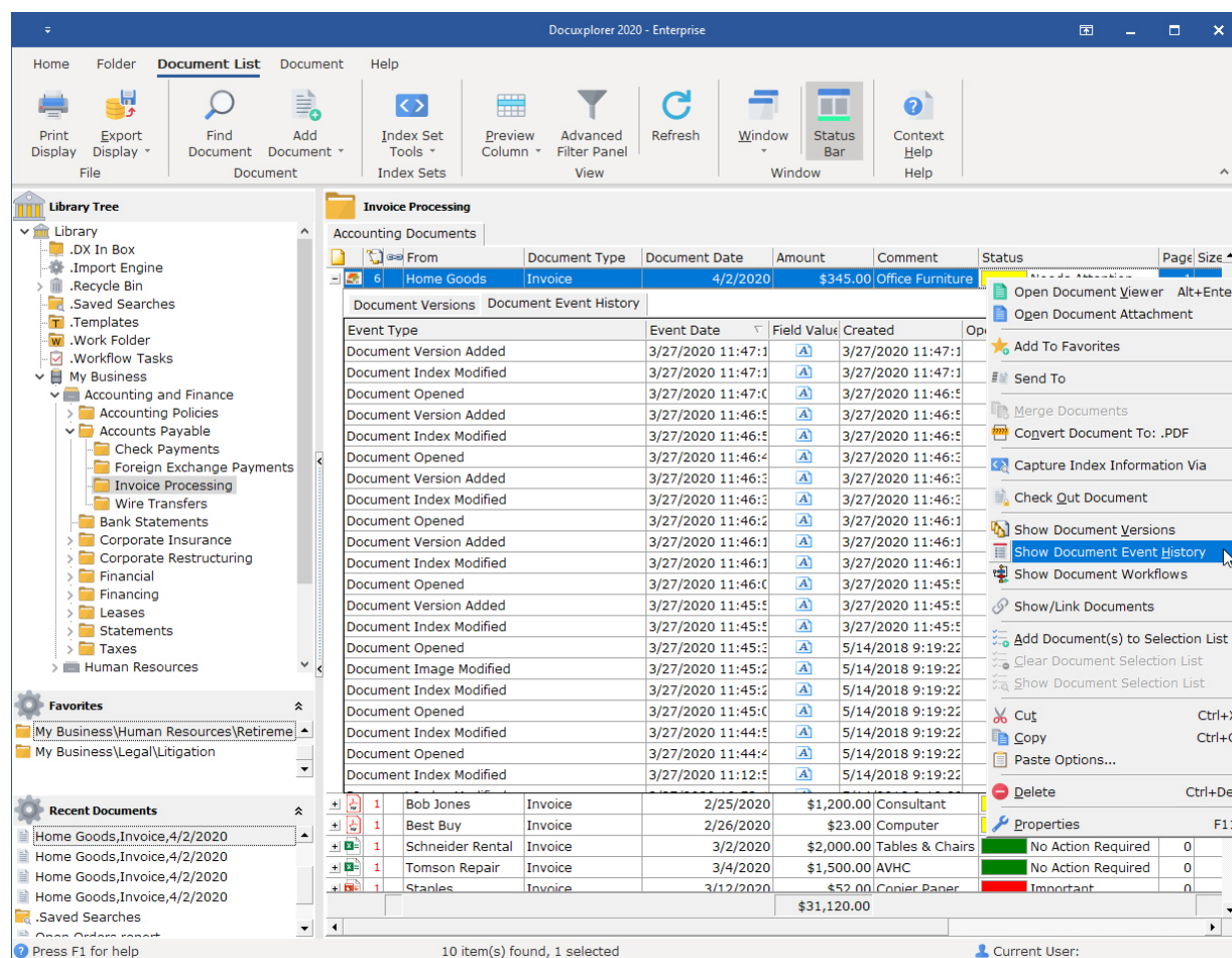
Users must choose to allow document logging from the Desktop Tools/Options/Administrative menu. Use the check box to allow document logging.

Often called an audit trail the Document Event History is used to determine the actions taken on a particular document. This feature is a requirement for HIPAA compliance.

The log displays the following data:

- Subject field data - the index data entry in the subject field
- Event Type
    - Document Added - the document was added
    - Document Opened - the document was opened
    - Document Closed: Viewed - the document was viewed and then closed
    - Document Closed: Version Created - the document was viewed, modified, a new version of the document was created and the document was closed
    - Document Closed: Image Modified - the document was viewed, modified and saved
    - Document Closed: Index Modified - the document was viewed, the index information modified. You can view new document index data in the Field Values item on the Event Log List View
    - Printed - the document was printed. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document E-mailed - the document was e-mailed. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document Deleted - the document was deleted
    - Document Version Deleted - a version of the document was deleted from the Show Versions List of the Document List View
    - Document Checked Out - the document was checked out for editing by a user. If "Require User Description" is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document Checked In - the document was checked in after an edit is completed by a user
    - .. Value [Reassigned](#) - an index value has been reassigned to another column.
    - [Exported](#) - the document was exported to a folder on a hard drive. If ["Require User Description"](#) is enabled you can see the data entered in the Field Values item on the Event Log List View
    - Document [Merged](#) - the document was merged with other documents.
    - [Converted](#) to ... - the document will be converted to a PDF or TIFF as determined by the print driver being used.
    - Document Duplicated from - the document was duplicated from (document name)
    - Document Closed: Attachment Deleted - a document associated to an index entry, either an Associated Application Document or Image Document, has been deleted in the Document Window and the index data of the document record still remains
- "Associated Application Document Viewer" Events:

- Pages Substituted - a document's associated file has been replaced with a different file (for example, the wrong Word file was associated with a set of index data. In the [Associated Application Viewer](#) you Import a new file to be associated with the index data.)
- Pages Appended - pages have been [appended to a PDF](#) from the Associated Application Document Viewer
- "Image Document Viewer" Events:
  - Pages Inserted - pages have been inserted into a TIFF image document
  - Pages Deleted - pages have been deleted from a TIFF image document
- Event date and time - the time and date of the event
- Field Values - the index data associated with the document including the names of email recipients of the document. Each field in the index set will display the current value of the field at the time the event was completed. You can also tell if a field has been modified by the "modified =" variable in the Field Values column.
- Creation time and date - the date and time the document was added to the DocuXplorer database
- Event operator - the name of the user who performed the event action

Delete Events from the Library Event Log

1. Log into DocuXplorer as Administrator

2. Click Tools < Options from the top menu

3. Click "Administrative" in the left pane

4. Set "Limit Number of days to view" to: 0

5. Click Save & Close

6. Click Tools < Library Event Log from the top menu

7. Select the events to delete (use ctrl + click to select multiple events, shift + click to select multiple consecutive events, or ctrl + A to select all events)

8. Click File < Delete to delete the events

Tip:

See the [<Tools><Options><Administrative>](#) to turn on "Require User Description when E-mailing, Printing or Exporting".

The Document Event History provides users with the ability to filter data and create customized views as well as print or export the data contained in the complete or filtered list. Please click the following link to the [Library Event Log](#) which can be filtered, printed and exported in the same manner.

Data in the Document Event History cannot be deleted in compliance with HIPAA regulations.

Cut, Copy, Paste, and Moving Documents

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the Document List View or Find Document Query Result List:

Copy Documents

DocuXplorer will allow you to copy a document within a Cabinet or to the Work Folder or a folder in another Cabinet. When documents are copied or moved all versions of the document are copied or moved with the document.

To create a copy of a document:
- Right click the document and choose Copy
- Open the folder you are moving the document to
- Right click in the folder and choose Paste

What to expect when...

When copying a document to the same Cabinet

When you copy and paste a document within the same Cabinet a Duplicate document is created with a new internal document ID. The document is treated like a brand new document and not associated with any versions or short cuts. The subject field name will also be changed with the additional text "Duplicate of <Original file Name>".

When copying a document to a different Cabinet

When you copy and paste a document to another Cabinet the internal document ID is maintained and support for updating it when copying it back to the original cabinet is maintained.

For example:

If a document has been copied to a different Cabinet and changes have been made to either the index information or the document image DocuXplorer will recognize those changes when that document is copied or moved into and Drawer or Folder in its original Cabinet. The program will inform you that the document being copied or moved already exists in the Cabinet but has been changed. The dialog box will show the dates of modification for the source and destination document and will ask you to

choose to update the document, leave the document as is, or create a new document (Duplicate) from the source document.

> Selecting "Update" will result in the original document taking on the modifications in the document being moved back into the Cabinet and creates a Shortcut to the document if the paste or drag and drop location is in any folder other then where the original is located.
>
> Selecting "Update All" occurs when multiple documents are being copied or moved and works the same as "Update" but applies your choice to all documents being copied or moved back into the Cabinet.
>
> Selecting "Cancel" will leave the current document in place without modification and will not process the remaining documents that are being moved or copied..
>
> Selecting "No" will leave the document in place without modification and will continue the process the remaining documents that are being copied or moved.
>
> Selecting "New Doc" will result in a new document with the modifications being created with a new internal ID.

Document Options

There is a difference between the source and destination document, Would you like to update the destination document or create a new document from the source document?

Source Document: Destination Document:

Caption............: 10002774   Caption............: 10002774
Fields modified.: 3/27/2020   Fields modified.: 3/27/2020
11:47:17 AM   7:04:05 AM
Image modified: 3/27/2020   Image modified: 3/25/2020
11:45:20 AM   6:54:14 AM

| Update | Update All | No | New Doc | Cancel |

Shortcuts

Shortcuts are placeholders that when opened will open the original document that still remains in its original location. Modifying a document or its index will modify the original document. Shortcuts can only be created for documents that are located in the same Cabinet. Shortcuts cannot be created for a document and pasted into a different Cabinet. Users will recognize a shortcut to a document by its unique icon. The icon will still represent the original document's associated application but will have a small angled arrow on the lower left hand corner.

Shortcuts are valuable when you need to place a document in multiple folders but do not want to have more than a single copy of that document being viewed and/or edited by your users.

To create a Shortcut to a document;
- Right click the document and choose Copy
- Open the folder within the same Cabinet you are copying the shortcut to
- Right click in the folder and choose Paste Shortcut

Cut and Paste or Moving Documents.

Cut and Paste will remove the selected documents from their original location and move them to the Paste location. When moving a document from one Cabinet to another all versions are moved with the document but shortcuts to the document are deleted as there is no longer any reference to an original document.

To move a Document:
- Right click the selected document and select Cut.
- Right click the destination Folder and select Paste

   or
- Use the Edit Menu on the Menu Bar to cut and paste to a new folder

Or Drag and Drop the Document:
- Highlight the Document.
- Hold down the left mouse button and drag the selected item to a Folder. When dragging a document to a new location hovering over an object (Cabinet, Drawer or Folder) will automatically open the object allowing you to navigate to the proper destination.
- then release.

Tip:
- As with the copy command documents can be moved from any Folder or Query Results List in the Find Document dialog.
- To select more than one document to move, hold down the CTRL key, and highlight the items to move. To select a group of documents in a series hold down the SHIFT key

Document Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

From the DocuXplorer Desktop:

To view or change Document properties:
- ▪ Highlight a Document in a Folder
- ▪ Right click and select Document Properties on the drop-down menu

The Document Properties dialog contains two windows. Each window has multiple property items that either describe or can change the properties of a document.

General Properties

Contains information about the Document such as Document and Database ID, dates of Creation, Modification and Access, number of document versions saved, document description and Check Out status, including date of check out, check out user and the note left by the user when the documents was checked out.
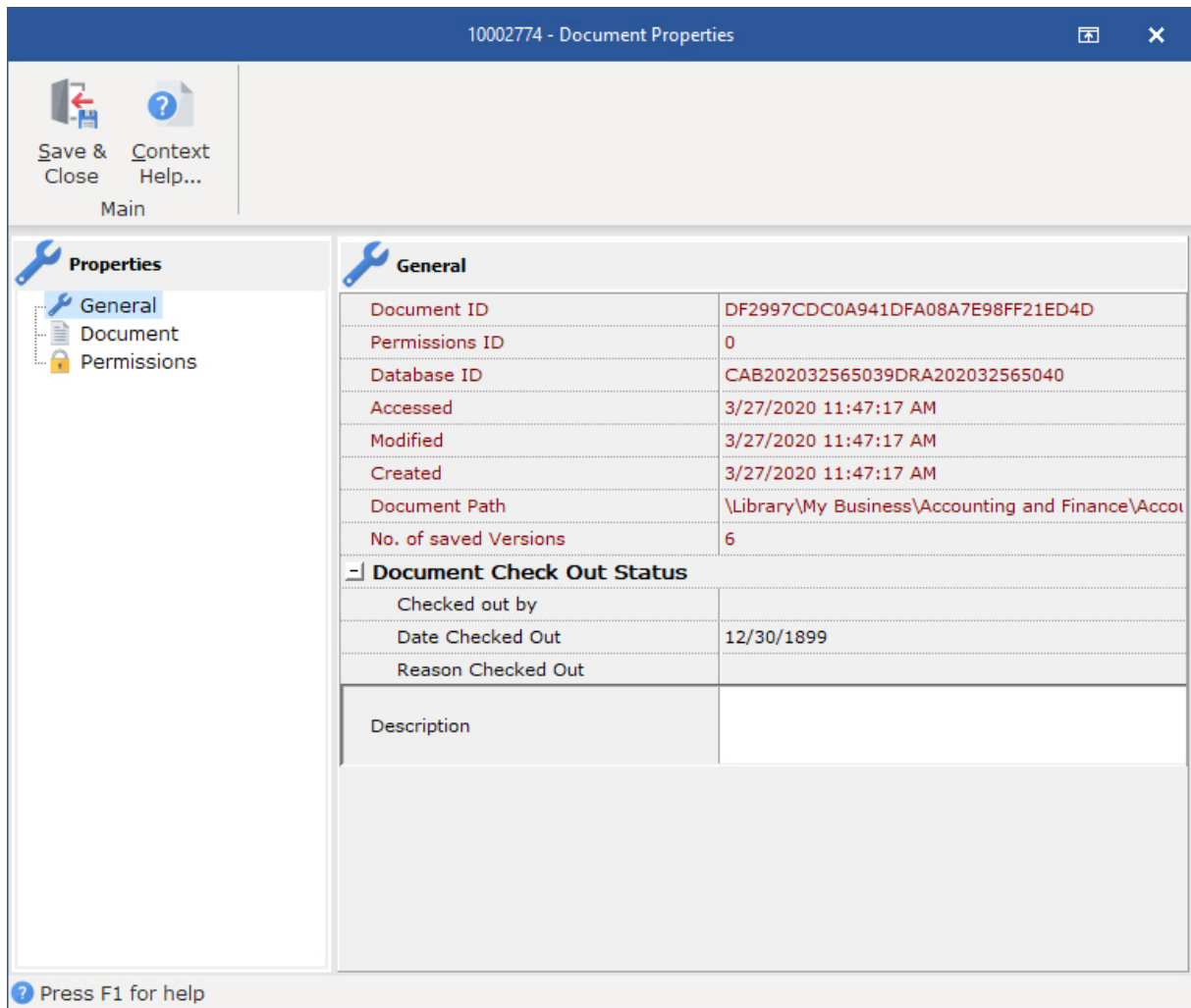
General Properties

Document ID - this item is the unique ID number given to this folder. This item cannot be edited and is used by tech support to determine document identification

Permission ID - this item is the ID number given to the permission set for the object

Database ID - this item is the unique ID number given to the database storing this folder. This item cannot be edited and is used by tech support to determine database and document identification

Accessed - the date and time this folder was last accessed

Modified - the date and time this folder was modified

Created - the date and time this folder was created

Document Path - the location of the document in the Library

Number of Versions Saved - the number of versions associated to this document

Document Check Out Status

Checked Out By - name of the user who has checked out the document

Date Checked Out - date the document was checked out

Reason Checked Out - the note left by the user when the document was checked out - click the icon to display the memo text

Description - an editable field that can be used to provide a description of what is contained in this document or any other memo information you might want to attach to this document. Any entry made to the Description Tab in the Document View Window is reflected here as a property of the document.

Document Properties

Use the Document Properties dialog to set up or change properties in the selected Document.
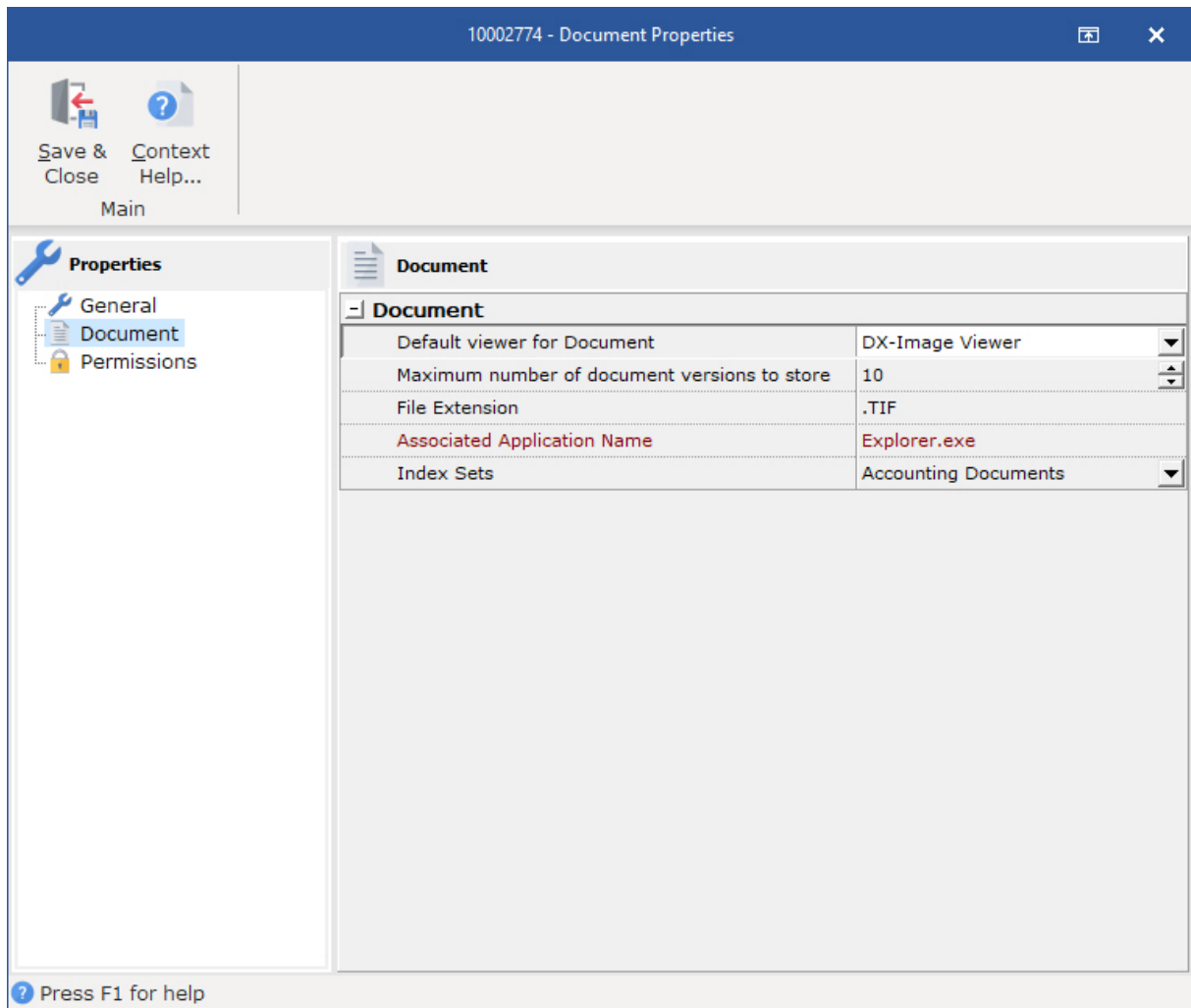
Default document viewer - choose from the drop down list the document viewer to be used for the selected document. Viewer choices are DX Image Viewer or Associated Application.

Maximum number of versions to store - Select the number of versions that can be created for the selected document

File Extension - Change the file extension for the image or associated application file attached to this document

Index Set - Select the document's associated Index Set

Tip:

Since the "Max number of version to store" can not be less then the number of existing document versions, you must first remove the unwanted versions before you reduce the number of versions allowed.

Document Permissions - Security is not available in DocuXplorer Personal or Small Business
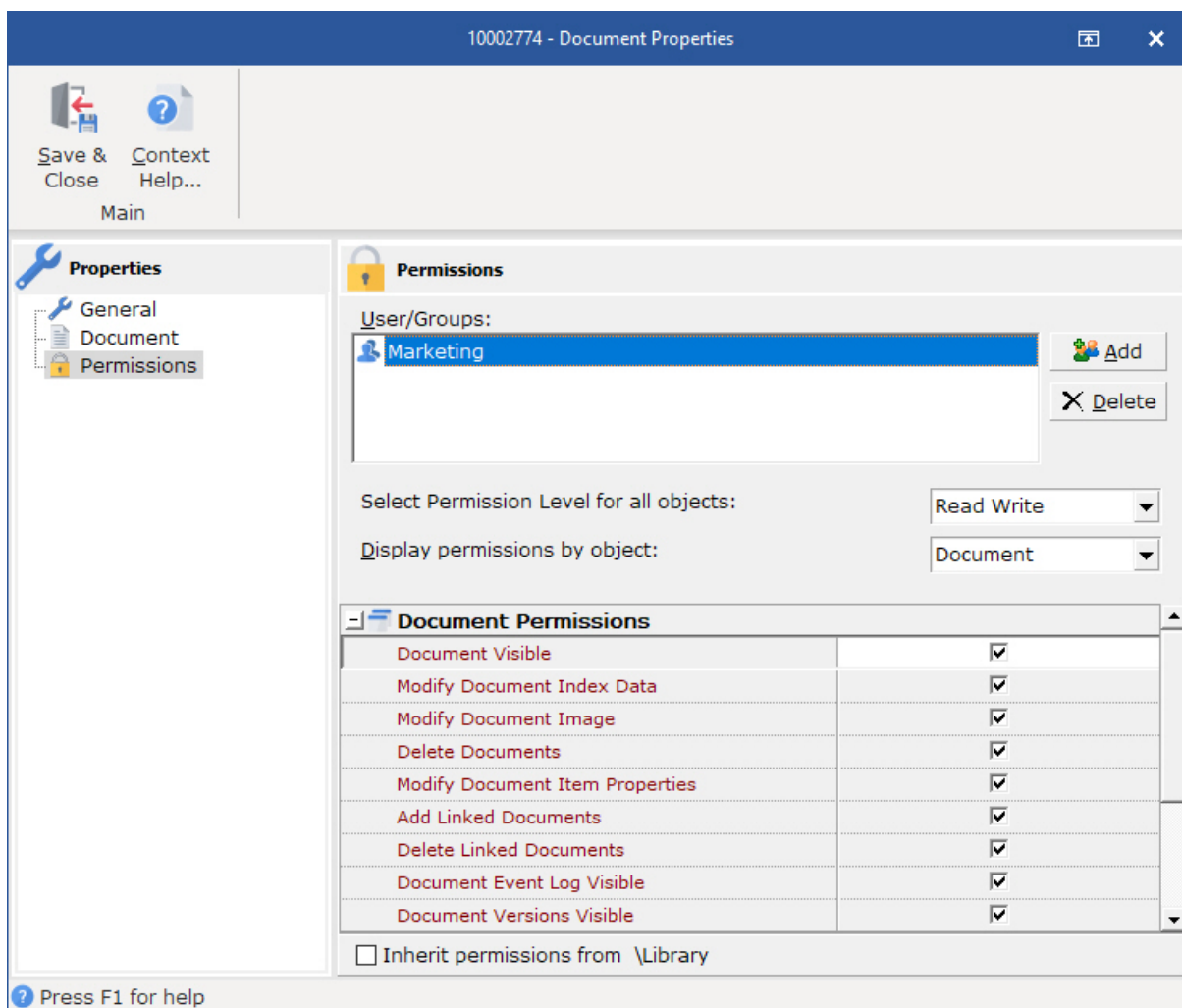
Permissions allow you to add users and groups and set security properties for users and groups for the Document. When permissions are inherited from a parent object the permissions items are grayed out. When an administrator or user with permission to make changes to security properties unchecks the Inherit Button, changes can be made to permissions.

- See the Security/Users/Groups help item for more information on how to add users and groups to a Document.

- See Security/Document Permissions for more information about setting Document permissions.

Tip:

- Documents inherit their permissions from their parent unless they have been specified as a parent object themselves. When a document

that is inheriting its permissions from a parent is moved it will then inherit the permissions of the new parent.

- To change permissions for the Document object you must uncheck the Inherit permissions from parent box before setting new permissions for users or groups.

Export a Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To export a document to a Windows Folder:
1. Right click the document to export to bring up a drop-down menu and choose Send To/Windows Folder
2. Choose a location to save the file
3. Click on Save

Export Documents/Index information in bulk using the Find Dialogue.
1. Open the Find Document dialogue in DocuXplorer from the top menu.
2. Click "Search by Field"
3. Enter a search term that will satisfy the criteria for Documents you'd like to export. In this case, we'll use a search that will render every Document in the Cabinet.
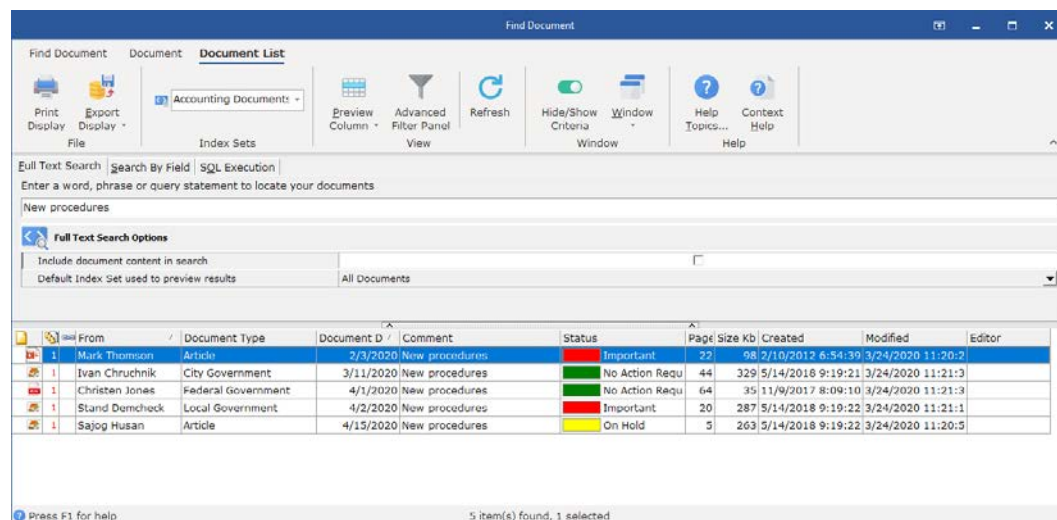
4. On the Find Document Tab select "Find Now"
5. Once the results appear, select the Document List tab and select Export Display and choose the format desired for the index information output
6. Once the display is exported, click any document in the results list to highlight it.
7. Hold CTRL and press A (Ctrl + A) to highlight all documents
8. Right click any of the selected documents and choose Send To < Windows Folder
9. Choose the folder to export the Documents

Tip:

By default the Subject Field entry will become the exported file's name. You can select other field values to combine to create an [export file name](#) in the Index Set Properties dialog box

If you exporting documents that are in a different language from your operating system you'll need to change your System Locale. Go to the regional settings dialog and select Administrative | Change system Locale.. and change the language to the language of the documents text your exporting.

Optical Character Recognition

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

DocuXplorer provides an effective method to convert scanned documents to text via Optical Character Recognition technology. This technology is provided in two methods. The first is to OCR an entire document or to OCR specific areas of a document called Zonal OCR.

[OCR a Document:](#)

The primary purpose of this feature is to allow users to locate documents by their content, but we highly recommend that Index Sets be used to identify documents accurately for long term storage and retrieval. DocuXplorer provides Taxonomy services to ensure you'll be able to locate your documents today and years from now with ease.

OCR Zones:

Zonal OCR is the process by which Optical Character Recognition can "read" specifically zoned text from a scanned image. This process allows the end user to identify and draw a "zone" on an image to be recognized. Once the zone has been established on the image, this zone will be applied to each image processed so that the data can be extracted from the image file and converted to an ASCII format.

About the Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Document Window displays index information along with its document attachment. The attachment can be a scanned document image, an imported image file, documents printed from a Windows program directly into DocuXplorer using the DocuXplorer PDF Print Driver or an icon representing an Associated Application Document. In the Document Window a user can also create a new document from an existing document.

You can change the display of the Document Viewer Window by moving the borders of the panes on the screen. For example, point to the right border of the Index Information Pane, and when the pointer becomes a double-headed arrow, drag the border to the left or right.

Image attachments can be annotated and edited in the Image Document Window. Users with permission to add documents document can create a new document from specific pages of an existing document.

The [Associated Application Document Window](#) displays the document's index information and either a preview of the document or an icon representing the document's associated application. File types that can be shown in a browse can be displayed in this presentation otherwise just an icon is shown to represent the document.

Associated Document Viewer sample showing Microsoft Word

Associated Document Viewer sample showing Adobe PDF

The [Index Information Only Document](#) Window:

This document type allows a user to create a document without an attachment. This feature is valuable when you need to create a searchable record in DocuXplorer and you do not have a paper document or electronic file to associated with it.

- The Information Tab contains the [index fields](#) associated with a document. The [Index Set](#) determines the Index Fields displayed and the display for each document.

- The Text Tab contains any memo information entered as well as any [OCR](#) text for this document. In the Text Tab users can add memo information or edit OCR text results.

Tip:

- It is recommended that no more than 5 Document Windows at a time are opened at a workstations. If you open 6 or more Document Windows you will be asked if that is really what you want to do.

- Documents are profiled with index information entered in an Index Field. Index Fields are assigned to Index Sets. Index Sets are created to profile a particular type of document (invoice, contract, etc.). When adding a document or changing a document's associated Index Set choose the appropriate Index Set from the drop down list on the toolbar.

- To open computer-generated documents you must have a copy of the original program installed on your computer workstation.

- To save and close an Attachment document you must close the document's native program before closing the Document Window.

- Document extensions (i.e. document.doc or document.xls) must be associated with a program in the Windows Registry to open them. To associate document extensions with a program see the operating system or Windows Explorer help.

Show or Hide in the Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

Located on the Document Window icon toolbar the Show or Hide button allows you to switch on or off the screen display of the Index Information Window or the Document Attachment Window. When you close the window with the Save and Close button the display will be saved as the default Document Window View.

Find in the Description Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In the Document Index Data Window/Description Field Tab:

To find specific characters or words:
- On the Search menu, click Find
- In the Find what: field, type the characters or words you want to find
- Click Find Next

Paste from a file to the Description Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In a Document Window/Document Description Field Tab:

To paste text from a file to the Description Field:
- Click on the right mouse button
- Choose Paste from a File...
- Select the file that contains the text you wish to capture
- Click Open

Tip

You can only paste text from files that have TXT or RTF document extensions.

Clear Index Set Values

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

From the Document Window icon toolbar:

The Clear Index Set Values button will clear the data that appears in the fields of an Index Set when you add new documents.

Cut, Copy, Paste in the Description Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   **Small Business**

In a Document Window/Description Field Tab:

To cut, copy and paste in the document text field:

- ▪ Highlight the word or phrase to cut or copy
- ▪ Click the right mouse button
- ▪ Click Cut or Copy
- ▪ Highlight the location to put the copy
- ▪ Click the right mouse button
- ▪ Click Paste

Save text to a file

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In a Document Window/Description Field Tab:

To save text to a file (export) from the Description Field:
- Click on the right mouse button
- Choose the location to save the file
- Type in the file name
- Click Save

Go To Desktop

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

To go to the Desktop from a Document Window:
- From the Ribbon File Tab select Desktop

Tip:

Using the Go To Desktop command leaves all Document Windows open. To go back to a Document Window choose the document from the Windows item on the Desktop Menu Bar.

Close All Document Windows

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Located in the Ribbon File Tab select close all open Document Windows.

Close all open attachments before closing document windows.

Save and Close

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

In a Document Window:

The **Save and Close** command will save any changes to the index information or a document image and close the Document Window.

Tip:

To simply close a document without saving any modification click the x at the upper right corner of the document window.

Close

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The **Close** command will close the Document Window without saving any changes. The Close command works the same as click [X] in the upper right corner of the window.

The Image Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Scanned in documents and images imported from a file are viewed, annotated and edited in the Image Document Window.

The Document Window consists of two sections. They are Document Index Information and the Document Image Window.

The Document Index Information Window:
- The Index Data Tab contains the index fields associated with a document. The Index Set determines the Index Fields displayed and the display for each document.

- The Description or Memo Field Tab contains searchable memo text created by users. This tab name will change based the setting in the Preview Column. If the Description or any other memo field is not being display then "Not Selected" is the default that has been set for the Preview Column.
- OCR Text Tab contains the searchable electronic text resulting from putting the image document through the OCR process.

In the Image Window you can:
- Add Pages to a scanned in document or imported image document
- Create a new document from images selected in an existing document
- Delete pages from an image document
- Create a new document from the thumbnail pages of an existing document
- Zoom to resize the page view
- Annotate a page in a document or image
- Despeckle a page, selected pages or entire document
- Straighten a page, selected pages or complete document
- Crop pages in an image document
- OCR a page, selected pages or the entire document

The image document provides a right click menu for complete manipulation of a single page. If the document has more than one page the thumbnail viewer is add to the display automatically. The Thumbnail view displays all the pages in an Image Document. Using the right-click menu you can reorder, delete or print pages in a document. Additional right-click menu functions are screen display refresh and change Thumbnail size. Thumbnails can also be used to create a new document from pages in an existing document.

Tip:
- If you are using a Simplex Scanner (a scanner which scans only a single side of the page) to scan in a document that has text on both sides of a page you can reorder the pages by using the Auto Collate feature available from the Image Document Window Tools menu item.
- Reach all Viewer functions from the menu bar. The Icon Toolbar contains shortcut icons to functions most often used in the Viewer.
- By holding the mouse cursor over each icon on the toolbar for a second, a balloon will appear with the function of that icon.

Create New Document from an existing Image Document

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

From the Image Document Window, DocuXplorer allows users to create new documents from existing documents.

With an image document a user can split an original document into multiple documents with each new document having a selected set of pages from the original document.

To create a new document from an Image document;

- In the Image Document Window select Thumbnails to view all pages scanned
- Select the pages to use in creating a document - hold down the shift key and click the pages to be used for the new document

Select the location to store to the document using "Place in Folder"

- Select an Index Set to associate with the new document
- Enter the index information

- From the File menu item click Create New

- Select the next group of pages in the Thumbnail View and repeat the process until all new documents are created

Tip:

- To save the original document with all its pages intact simply close the document without saving the changes.

NOTE: After clicking [Create New] to create the new document, the document showing in the Document View window will be associated with the new Index Set if it was changed and the new Folder if it was changed.

If [Save & Close] is clicked, the document in the Document View window will also be moved to the new location.

To save the document in the Document View window back to the original folder and Index Set, the Index Set and Folder MUST be changed back to their original values if they were changed then click [Save & Close].

Import in Image Documents

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:
Importing allows you to add, replace, or append pages to an existing document.

Import pages to an existing document is found in the Image Document Window File menu.

The three different methods of importing a page to an image document are:

New - Importing a new page to an existing document replaces the existing pages in the document with the imported pages.

Append - By appending to an image document you add all the pages of the imported file to the end of the existing image document.

Insert - Inserting a page in a document places the imported pages in front the page you are viewing.

Copy a Page in an Image Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

When copying a page from one image document to another, pasting the image over an existing image will copy the new page over the previous image. The following instructions allow you to add copied image as a new page in a document.

To copy pages in an image document:

- Display the page that you want to copy in the source document
- From the right-click menu, click Copy Page
- Open the destination image document
- Right click the image window to bring up a menu and select Add Blank Page
- Right click the blank page and select Paste

Tip:

You can rearrange the pages in a document after adding a copied page by clicking on the Thumbnails tab and dragging and dropping the pages into place.

Redo

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window <Menu Bar> <Edit> item:

The Redo command is specific to the Image Document Window. When you click Redo it will reverse the last action of the Undo command.

Delete pages from an Image Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From an Image Document Window

To delete pages from a document image:

- Select the page to be deleted by highlighting it with your mouse
- Click your right mouse button to bring up a menu
- Click delete

Or

- Press the DEL key

Paste a Page in an Image Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To paste an image document page:
- Select the page or pages to be copied over.
- From the right-click menu, click Paste
- Right click the image once more to complete the paste process

To add a page to an image document:
- Right click the image window to bring up a menu and select Add Blank Page
- Right click the blank page and select Paste

Tips:
- When pasting a page into a document, the pasted page will always copy over an existing page.
- You can paste a cut or copied page to any Windows program by pasting the page from the clipboard

Printing from the Image Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

To print a document from the Image Document Window;
- From the Image Document Window File Menu click Print
- Choose the printer or accept the default
- Choose additional options or accept the defaults
- Click Print

Or

- Right click the document to Print to bring up a drop-down menu and select Send To/Printer Device
- Select device to print

Display Algorithm

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window Menu Bar | Image Display Algorithm item:

The Display Algorithm control found in the Image menu can optimize the display of your documents. The drop-down list will give a choice of Display Algorithms. They are;

- Normal - all pages remain unchanged
- Scale to Gray 256 shades of gray. All page types are scaled to gray
- Reduction Only - used for thumbnail representations
- Optimize - changes the display algorithm based on the type of displayed image;
- Black and white images are scaled to gray
- Palletized 4 and 8 bit, RGB and BGR images remain color images

Scale in Image Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window <Menu Bar><Image><Scale> drop-down list:

The following are the four image display view options:
- Manual - Displays the image by the percent scale selected
- Best Fit - Displays either the full height or the full width of the page in the window, depending on which results in the least unused space.
- Best Fit shrink Only - Displays the image to fit the height or width depending on which of the two is smaller.
- Fit to Height - Displays the full height of the page in the window.
- Fit to Width - Displays the full width of the page in the window.

Image Compression

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Image Compression is located under Image in the menu at the top of the left hand window when an image document is opened in the Image Window. When you click on the [Image][Image Compression] choice, this window will appear.

Compression is the process by which the size of an image file is reduced to require less storage space and to reduce stress on a network's throughput when it is moved from place to place. For example, an 8.5-inch by 11-inch black and white document, scanned for faxing, produces an image file of about 4675 KB, nearly half a megabyte, when no compression is used. That same file, compressed, is about 50 KB, significantly smaller than original size. Using compression is particularly important when you work with grayscale or color images due to their large uncompressed file size.

Compression options apply to TIFF image files only. AWD files are automatically compressed through a Microsoft-proprietary compression type, and BMP files cannot be compressed.

Image Compression Types are:
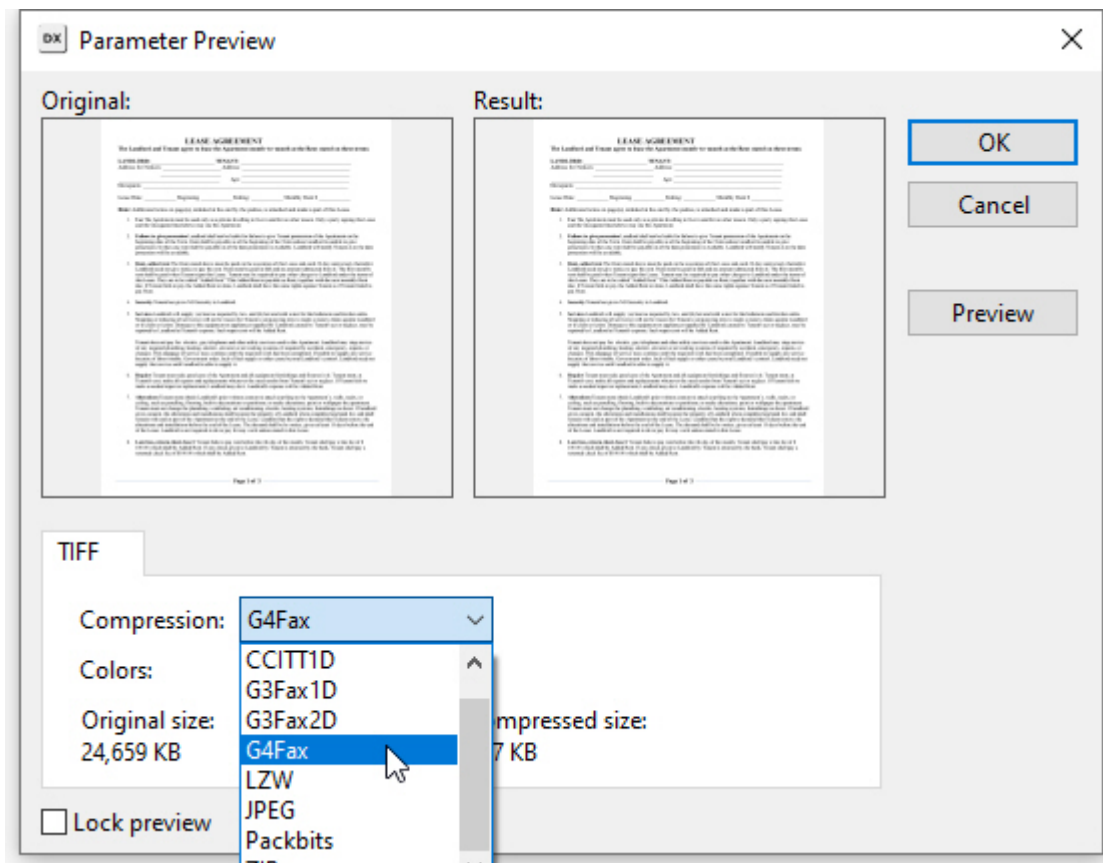
- CCITT Group3 (1d) Fax - For black and white image files designated for fax transmission
- CCITT Group3 (1d) Modified Huffman - For black and white image files designated for fax transmission. Modified Huffman typically achieves a greater file size reduction than Group 3 (1d) Fax
- CCITT Group4 (2d) Fax - For black-and-white image files that travel over reliable data links, such as ISDN or X.25. It provides superior compression for non-dithered images when compared to the Group3 (1d) compression types
- Reversed Bit Order - Controls the way that data compressed with a CCITT compression type is written to the image file. Left to right ordering of the compressed data bytes is standard, while reversed bit order is right to left
- JPEG (Joint Photographics Experts Group) - For True color and 256 shades of gray image files. JPEG produces a high compression ratio, but discards some image data during compression. When you specify JPEG compression type, you also specify JPEG resolution and compression options that determine overall quality of image documents and the storage space they require
- LZW (Lempel-Ziv-Welch) - For all color and grayscale image files, but not black and white. LZW does not discard data during compression, and so provides exact reproduction of the original image, with a corresponding lower compression.
- PackBits - For black and white image files

The original document will be shown in the left hand window. You choose a
   compression option by clicking the right arrow of the
Compression drop down menu and choosing the desired compression.

The size of the file also depends on the color options. The higher the color
   resolution the larger the file..

After selecting the compression and the color resolution click the Preview
   window to see the effect of your selection.
The size of the original image and the compressed image will appear at the
   bottom of the screen.

Use the [Lock preview] to see you adjustments in real time. Please note this
   may slow the process down slightly.

When you are satisfied, click the [OK] button to finalize your selection.

Invert B&W Image

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Invert B&W Image found in the Image menu item of the Image Document Window allows you to invert the display of an image from black on white to white on black or vice versa.

Tip:

This is valuable when scanning documents from Microfiche in the negative format – this function will allow users to turn the negative, white on black image into a positive black on white image.

Image Resolution

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Resolution defines the clarity of an image when it is displayed. Resolution is the density of the dots that make up the image. Resolution is expressed in dots per inch (dpi) or, in picture editing software, in pixels per inch (ppi). The higher the resolution, or dpi, of a captured image document, the higher the display quality.

High resolution combined with low compression results in the best quality image, but also the largest file size. For uncompressed images, file size is proportional to image resolution. For example, the file size for an image with a resolution of 200 dpi is four times greater than the file size for an image of the same size and a resolution of 100 dpi. After compression, the 200 dpi file is still larger than the 100 dpi file, but not proportionally so, because of advantageous compression algorithms.

Optimal combinations of resolution and compression depend on what images may be used for. For example, if image documents are exclusively for screen display, with no OCR and little printing, resolution need not be any greater than the display resolution of the monitor, typically 75 dpi to 100 dpi. On the other hand, images that are to be faxed should conform to the international fax standard of 200 dpi. For printing and OCR, while 200 dpi can accomplish the task 300 dpi will offer better results.

Document Image Window Ribbon

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑Small Business
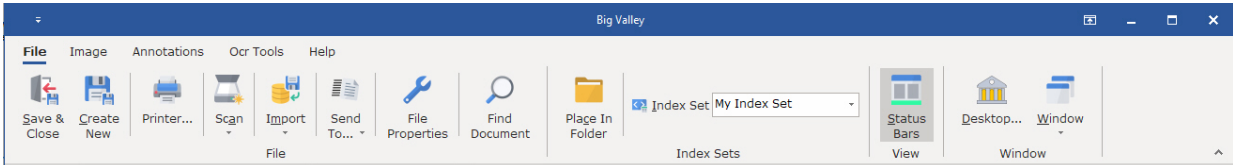
- Save and Close - Save the current document and close the window

- Create New - Allows the user to select one to many thumbnail images, index information and Save it as a new document

- Printer - Allows the user to print the document image

- Scan - Allows the user to append, insert or create a new document from the scanning device

- Import - Allows the user to append, insert or create a new document from the operating systems filing system

- Send To - Allows the user to send the document to a windows folder, email, workflow or default printer

- File Properties - Show the list of the document extended meta data stored in the document it self

- Find Document - Allows the user to access the Find Document dialog and to locate other documents

- Place in Folder - provides a browse window to select a location for a saved document. When adding a new document to DocuXplorer you can select to place the document in a Folder other than the Folder in focus, this is accomplished using the Toolbar item <Place in Folder>. When using <Place in Folder> and changing the storage location of the document to a Folder other than the one in focus; the Index Set display in the Document Window will change to display the default Index Set for the Folder selected. This feature is only able when adding a new document. When changing a location for a previously saved document the Index Set will always display the Index Set associated with the document.

- Index Set - Allows the user to select an index set other than the current one for the document indexing process

- Status Bar - Show the use file information and progress information when longer process are executed

- Desktop - Allows the user to navigate quick back to the Dx desktop

- Window - Allows the user to see a list of open document for which the can quickly navigate to

- Mouse Cursor - This cursor, shaped like an arrow, is used with annotations. The cursor will move, resize or open annotations for editing

- Image Cursor - This cursor shaped like a box is used with images and will allow you to select areas of the image that can then be moved, copied, cropped, OCR selected text, printed or deleted.

- Drag Image Cursor - The drag image cursor which looks like a hand will move an image that is larger then the display screen. The cursor can drag images up or down or side to side.

- Magnifier Glass - Enable the user to enlarge the selected area
  - You can control the size of the magnifying area by dragging the edges of the magnification box.
  - Right click the magnifier to access the popup menu
    - zoom scale - enter the percentage amount to zoom in or out
    - Save Settings - save your adjustments to the magnifier
- Zoom Area - Enable you to select a region to enlarge
- Zoom in/Out -Enable you to enable the mouses scroll wheel to be used to scale the image up and down
- First - Navigates to the first page of the document
- Previous - Navigates to the prior page of the document
- Next - Navigates to the next page of the document
- Last -Navigates to the last page of the document
- Go to Page - Enable you to enter a page number to navigate to
- Show/Hide Thumbnails - Hides or shows the thumbnail images for each of the pages of the document
- Thumbnails - Enable you to adjust the thumbnail size
- Display Algorithm
  - Normal - all pages remain unchanged
  - Scale to Gray 256 shades of gray. All page types are scaled to gray
  - Reduction Only - used for thumbnail representations
  - Optimize - changes the display algorithm based on the type of displayed image;
  - Black and white images are scaled to gray
  - Palletized 4 and 8 bit, RGB and BGR images remain color images

- Image scale - Enable you to change to size of the document for easier reading-
- Scale -
  - Manual - Displays the image by the percent scale selected
  - Best Fit - Displays either the full height or the full width of the page in the window, depending on which results in the least unused space.
  - Best Fit shrink Only - Displays the image to fit the height or width depending on which of the two is smaller.
  - Fit to Height - Displays the full height of the page in the window.
  - Fit to Width - Displays the full width of the page in the window.
- Image Tools - Please see help context item "Working With Documents | The Document Image Window | Image Tools"
- Batch Image Processing Tools - Enable the user to use the Image Tools across many selected pages at a time

Select this link for detailed information About Image Annotation

- Help Topis - Provides access to all of DX's help topics
- Help Context - Provides access to the help context of the current select item in the interface

Image Document Window Mouse Cursors

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Document Image Window:

To select Image Document Window Mouse Cursors:
- ▪ From the edit item of the Menu Bar

The available types are:

Mouse Cursor

This cursor, shaped like an arrow, is used with annotations. The cursor will move, resize or open annotations for editing.

Image Cursor

This cursor shaped like a box is used with images and will allow you to select areas of the image that can then be moved, copied, cropped, OCR selected text, printed or deleted.

Drag Image Cursor

The drag image cursor which looks like a hand will move an image that is larger then the display screen. The cursor can drag images up or down or side to side.

Go to the first or last page on a Scanned Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To go to the first or last page in an Image Document in the Image Document Window :

- ▪ On the Image Document Window Page Icon Toolbar, click the Left most arrow to go to the first page or click the Right most arrow to go to the last page.

Or

- ▪ On the Image Document Window Icon Tool Bar use the First or Last command.

To go to the next or previous page:

- ▪ From the Page menu of the Image Document Window click Next or Previous

Or

- ▪ From the Image Document Window Icon Toolbar use the Left and Right arrows

To go to a specific page:

- ▪ From the Page menu click Go To Page
- ▪ Type in the number of the page you wish to go to
- ▪ press Enter

Or

- ▪ From the Icon Toolbar page number display, click the number being displayed
- ▪ Type in the page number you wish to go to
- ▪ press Enter

Refresh

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

This command refreshes the screen display.

Tip:
- Use F5 to initiate this command.
- If you remain in the same folder for extended periods of time you may need to refresh your screen display from time to time to include any documents added by another user on the network during the present session.

Status Bar in the Image Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In the Image Document Window:

The Status Bar gives you information about the image being displayed in the viewer.

The information displayed is;

- Number of pages in a document and the page number being viewed (i.e. Page 1 of 7)
- File Size

About Thumbnail Views

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window Thumbnail View allows you to manipulate the pages of an image document. You can change the order of pages, delete pages, or choose which page of a document to view and annotate in the Full Size Window.

Thumbnail Size - Off of the page menu or the right click menu of the thumbnail image you can adjust the size of the thumbnail image

To move pages within a document:
- ▪ Click Thumbnails, and select the pages
- ▪ Drag the pages to the desired position
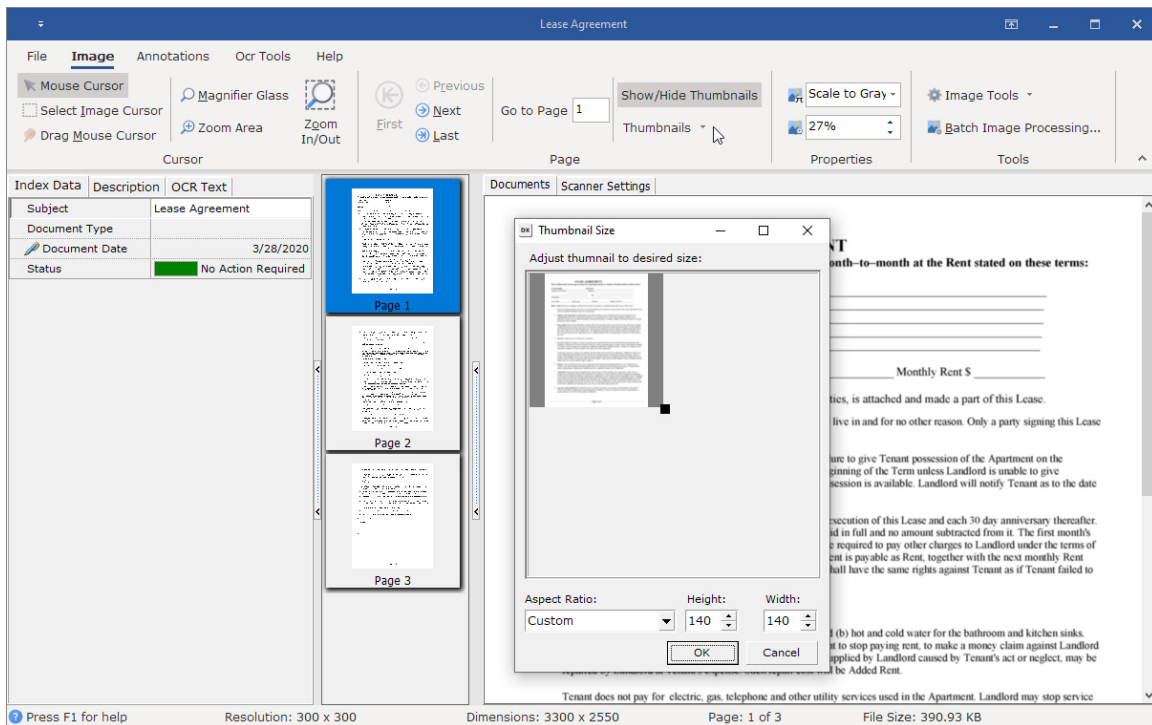
Create New Document from pages in an Existing Document

Thumbnails can also be used to [create a new document from pages in an existing document](#).

Tips:

- To select non-contiguous pages, press Ctrl and click each page.
- To select a range of contiguous pages, press Shift and click the First and Last pages.
- Pages can be exported from a document by selecting the thumbnails of the pages to export and using the File/Export item to create a file on a hard drive.

Thumbnail Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In the Image Document Window

To change Thumbnail Properties:
- ▪ Open an image document
- ▪ Click on the Thumbnail Tab in the Image Window
- ▪ Click on your right mouse button to bring up a menu
- ▪ Click on Thumbnail size…
- ▪ Drag the black square on the lower left of the image with your mouse to the size desired

Or

- ▪ Change the values in the Aspect Ratio field.

Zoom and Magnify

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To zoom in or out on a page:
- ▪ From the Icon Toolbar or the Image menu of the Document Image Window, enter a numeric percentage amount to zoom in or out or use the up and down arrows at the end of the Zoom field.

To Magnify an area of the image page
- ▪ From the Image menu of the Document Image Window,
- ▪ You can control the size of the magnifying area by dragging the edges of the magnification box.
- ▪ select the item Magnifying Glass and drag the mouse over the area to magnify.
- ▪ enter a numeric percentage amount to zoom in or out or use the up and down arrows at the end of the Zoom field.

Tip:
You can control the size of the magnifying area by dragging the edges of the magnification box.

Zoom Area

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In the Image Document Window:

To zoom to an area of a page:
- From the Icon Toolbar or the Image menu of the Image Document Window, click Select Zoom Area
- Draw an area on the image in-which you wish to have magnified

Image Annotations

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Image annotations are markup (redaction) tools used to add information as an overlay on an image document. these annotation tools are only available for Image Documents. PDF, Word or other types of documents require their native programs to provide similar features.

The annotation tools provided in DocuXplorer are:

Freehand

Freehand Highlighter

Rectangle Highlighter

Connection Line

Straight Line

Hollow Rectangle

Filled Rectangle

Typed Text

Hyperlink

Sticky Note

Optical Character Recognition Zone

Rubber Stamps

Reference Image

Embed Image

Text from a File

Redaction

Ellipse

Polygon

Create an Annotation:
- ▪ Open the document to annotate
- ▪ From the Annotation menu or the Annotation Icon Toolbar, choose an annotation tool

▪ Click or drag the mouse pointer on the page to create the annotation

Delete an Annotation:

- Select the Icon on the tool bar that look like an arrow (Image Selection Cursor)
- Right click the annotation and select Delete

Move an Annotation:

- Select the Icon on the tool bar that look like an arrow (Image Selection Cursor)
- Click and hold the left mouse button down on the selected annotation and drag to the desired location

Resize an Annotation:

- Select the Icon on the tool bar that look like an arrow (Image Selection Cursor)
- Left click the desired annotation, note the tag marks on each corner, left click and hold and drag tag marker to the desired size location

Tips:

▪ Use annotations to add notes or highlighting to documents. Annotations do not permanently change a document and can be removed at any time.

▪ To change any of the properties of an existing annotation, select the annotation, click the right mouse button, and click Properties.

Show Annotations

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To show the Annotations in a document and the Annotation Toolbar in the Image Document Window:

- From the Annotation menu, click Show Annotations

Tip:

The Annotation Toolbar gives you all the functionality of the Annotation Menu. On the toolbar are icons to choose the Select Annotations Mouse Cursor and to add all the available annotation types.

Annotations - Cut or Copy

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To cut or copy an annotation:
- On the Annotation menu, click Select [Annotations Mouse Cursor](#).
- Click on the annotation to select it, and then on the Edit menu, click Cut or Copy.

Tips:
- To cut or copy a hyperlink annotation, point to the annotation with the selection pointer, click the right mouse button, and then click Cut or Copy.
- When you cut an annotation, the information on the underlying image is not cut.
- When you copy part or all of an annotated page, only the information on the underlying image is copied. You copy annotations separately.
- When you paste an annotation, it appears in the upper left corner of the page. You can drag it to the location you want.

Change the color or font of an existing annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Annotation color and font are properties of an annotation and can be changed in their Properties dialog.

To change the color or font of an existing annotation:

- Click on the annotation to select it.
- Point anywhere on the annotation, click the right mouse button.
- Click on the Properties command.

Tip:
To change the color, or font of a hyperlink annotation, point to the annotation with the selection pointer, click the right mouse button, and then click Properties.

Rubber Stamp Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

This feature is found on the Annotations item of the Menu Bar of an Image Document Window or on the Icon Toolbar.

To add a Rubber Stamp as an image document annotation:
- On the Annotation menu, click Rubber Stamp
- Highlight the Rubber Stamp to be used
- Click OK
- Move your mouse to the document preview pane
- Click the left button of your mouse to place the annotation in that spot

Users can create two types of rubber stamps as an Image Document Annotation - an image stamp or a text stamp.

To create an image rubber-stamp:
- On the Annotation menu, click Rubber Stamp, and then click the Create Image button
- In the Stamp name box, type a name for the stamp
- In the Image stamp file box type the location and name of the image file you want to use for the stamp, or click Browse to find the file
- To add the new stamp to the list click OK

Or

To create a text rubber-stamp:
- On the Annotation menu click Rubber Stamp then click the Create Text
- In the Stamp name box type a name for the stamp
- In the Stamp Text box type the text to display when the rubber stamp is applied
- To add the new stamp to the list click OK

Hyperlink Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To create a hyperlink annotation:
- Open the image document to annotate
- From the Annotation item on the Menu Bar, click Hyperlink.
- Place the cursor over the area you want to place the annotation and click the left mouse button.
- In the box, Link to file or URL, select a destination from the drop down list, type a path and file name, or click Browse. To select an Internet address, you must have an Internet browser installed on your computer.
- To specify a page, click the up or down arrow in the box titled "Named location in file". Specify a page only if you are linking to a TIFF image document.
- To preserve the link to a file whose location may change, check the box "Use relative path".
- Click OK, and then type the text to identify the link.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor..

Tips:
- You can not link to a document within the DocuXplorer Library, you may link to a document on a hard drive or the Internet
- To change the text color or font, point to the annotation with the selection pointer, click the right mouse button, and then click Properties.
- To move the annotation on the page, or to change the text frame size, drag the selection pointer to frame the entire annotation area, then drag.
- To change the link destination, point to the annotation with the selection pointer, click the right mouse button, and then click Link To.
- To delete a hyperlink annotation, point to the annotation with the selection pointer, click the right mouse button, and then click Delete.

Freehand Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To write a freehand annotation:
- From the Annotation item of the Menu Bar, click Freehand Line.
- To annotate, drag the mouse pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:
- To change the line width or color of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To define a hyperlink for an existing freehand annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.

Highlighter Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To use highlighter annotation:
- From the Annotation item on the Menu Bar, click Highlighter.
- To annotate, drag the mouse pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:
- To change the highlight color of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To define a hyperlink for an existing highlighter annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.

Straight Line Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To draw a straight line annotation:
- From the Annotation item of the Menu Bar, click Straight Line.
- To annotate, drag the mouse pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:
- To change the line width or color of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To define a hyperlink for an existing straight-line annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.

Filled Rectangle Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To draw a filled rectangle annotation:

- From the Annotation item of the Menu Bar, click Filled Rectangle.
- To annotate, hold down the left mouse button and drag the mouse pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:

- To change the color of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To define a hyperlink for an existing filled rectangle annotation, click on it with the selection pointer. Click the right mouse button, and then click Link To.

Hollow Rectangle Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

In the Image Document Window:

To draw a hollow rectangle annotation:

- From the Annotation item of the Menu Bar, click Hollow Rectangle.
- To annotate, drag the mouse pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:

- To change the line width, color, or transparency of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To define a hyperlink for an existing hollow rectangle annotation, click on it with the selection pointer. Click the right mouse button, and then click Link To.

Typed Text Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

In the Image Document Window:

To type a text annotation:
- From the Annotation item of the Menu Bar, click Typed Text.
- Click the cursor where you want to place the annotation, and type the text.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:
- To edit the text, or to change the text color or font, click the annotation with the selection pointer. Click the right mouse button, and then click Edit or Properties.
- To move a text annotation, or to change the text frame size, click it with the selection pointer, then drag.
- To define a hyperlink for an existing text annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.
- Tabs are not supported in text annotations, and are displayed as small box characters.

Sticky Note Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To place an Sticky Note annotation:
- From the Annotation item of the Menu Bar, click Sticky Note.
- Click the cursor where you want to place the annotation, and type the text.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:
- To edit the text, click the annotation with the selection pointer, click the right mouse button, then click Edit.
- To change the note color, or to change the text color or font, click the annotation with the selection pointer, click the right mouse button, and then click Properties.
- To move the annotation, or to change the note size, click it with the selection pointer, then drag.
- To define a hyperlink for an existing Sticky Note annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.

Text from a File Annotation

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To use text from a file as an annotation:

- From the Annotation item of the Menu Bar, click Text From File.
- Click the cursor where you want to place the annotation.
- Locate and click the text file you want, click Open, and then click the selection pointer.
- To stop annotating, on the Annotation menu, click Select Edit | Mouse Cursor.

Tips:

- To change the text color or font of an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Properties.
- To move the annotation, or to change the text frame size, click it with the selection pointer, then drag.
- To define a hyperlink for an existing annotation, click it with the selection pointer. Click the right mouse button, and then click Link To.
- Tabs are not supported. If the text file you import contains tabs, they are displayed as small box characters.

Burn Annotation Permanent

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the Annotation item of the Menu Bar:

The Burn Annotation Permanent feature will make annotations permanently into an image document.

Image Document Annotations are normally stored as an overlay to a document to ensure original document integrity.

There are occasions where a user needs a document with the annotations burned into the document permanently. One such occasion is when a user wants to email a document with portions redacted (covered with a black line preventing the recipient from seeing those portions of the document). To permanently attach annotations to a document use the Make Annotation Permanent feature.

Tip:

Original document integrity is extremely important. To ensure that you keep an unchanged original document set the document properties to allow DocuXplorer to create versions or a duplicate copy of the document. In this way you can have both versions original and edited.

While annotations may display in color when annotations are made permanent they take on the property of document. Since most document are scanned in as black and white the annotation will revert to black and white as well.

Optical Character Recognition

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer provides an effective method to convert scanned documents to text via Optical Character Recognition technology. This technology is provided in two methods. The first is to OCR an entire document or to OCR specific areas of a document called Zonal OCR.

OCR a Document:

The primary purpose of this feature is to allow users to locate documents by their content, but we highly recommend that Index Sets be used to identify documents accurately for long term storage and retrieval. DocuXplorer provides Taxonomy services to ensure you'll be able to locate your documents today and years from now with ease.

OCR Zones:

Zonal OCR is the process by which Optical Character Recognition can "read" specifically zoned text from a scanned image. This process allows the end user to identify and draw a "zone" on an image to be recognized. Once the zone has been established on the image, this zone will be applied to each image processed so that the data can be extracted from the image file and converted to an ASCII format.

OCR a Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Requirement:

To OCR a documet, the file should be a .tiff file with a resolution of 200dpi or higher in Black & White or Gray Scale.

To OCR an Image Document:

- Open the Image Document Window
- If the document has more than one page, select the page or pages to be processed via thumbnail viewer
- From the Tools Menu, select | Capture information via | Update Full text Search Info.
- Once the information has been processed, the OCR Text tab will automatically be selected so you can see the result of the OCR process

The quality of the OCR results can be improved by scanning at a higher resolution or changing the contrast levels. Scanning resolution levels should be between 200 and 300dpi.

Document OCR helps to automate data extraction from digital images. However, zonal OCR, and OCR in general, is not entirely accurate and review of the extracted data will be required.

Lease Agreement

File   Image   Annotations   Ocr Tools   Help

Mouse Cursor | Magnifier Glass | Previous | Show/Hide Thumbnails | Scale to Gray | Image Tools
Select Image Cursor | Zoom Area | First | Next | Thumbnails | 24% | Batch Image Processing...
Drag Mouse Cursor | | | Last | Go to Page 1

Cursor | Page | Properties | Tools

Index Data | Description | OCR Text

LEASE AGREEMENT

The Landlord and Tenant agree to lease the Apartment monthtomonth at the Rent stated on these terms:

LANDLORD: TENANT:
Address for Notices: Address:
Apt.
Occupants:
Lease Date: Beginning Ending: Monthly Rent $

Rider Additional terms on page(s), initialed at the end by the parties, is attached and made a part of this Lease.

1. Use The Apartment must be used only as a private dwelling to live in and for no other reason. Only a party signing this Lease and the Occupants listed above may use the Apartment.

2. Failure to give possession Landlord shall not be liable for failure to give Tenant possession of the Apartment on the beginning date of the Term. Rent shall be payable as of the beginning of the Term unless Landlord is unable to give possession. In that case rent shall be payable as of the date possession is available. Landlord will notify Tenant as to the date possession will be available.

3. Rent, added rent The Rent stated above must be paid on the execution of this Lease and each 30 day anniversary thereafter. Landlord need not give notice to pay the rent. Rent must be paid in full and no amount subtracted from it. The first month's rent shall be paid when Tenant signs this Lease. Tenant may be required to pay other charges to Landlord under the terms of this Lease. They are to be called "Added Rent." This Added Rent is payable as Rent, together with the next monthly Rent due. If Tenant fails to pay the Added Rent on time, Landlord shall have the same rights against Tenant as if Tenant failed to pay Rent.

4. Security Tenant has given NO Security to Landlord.

5. Services Landlord will supply: (a) heat as required by law, and (b) hot and cold water for the bathroom and kitchen sinks. Stopping or reducing of service(s) will not be reason for Tenant to stop paying rent, to make a money claim against Landlord or to claim eviction. Damage to the equipment or appliances supplied by Landlord caused by Tenant's act or neglect, may be

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LEASE AGREEMENT

The Landlord and Tenant agree to lease the Apartment month–to–month at the Rent stated on these terms:

LANDLORD: _____   TENANT: _____
Address for Notices: _____   Address: _____
_____   Apt.: _____
Occupants: _____

Lease Date: _____   Beginning _____   Ending: _____   Monthly Rent $ _____

Rider Additional terms on page(s), initialed at the end by the parties, is attached and made a part of this Lease.

1. Use The Apartment must be used only as a private dwelling to live in and for no other reason. Only a party signing this Lease and the Occupants listed above may use the Apartment.

2. Failure to give possession Landlord shall not be liable for failure to give Tenant possession of the Apartment on the beginning date of the Term. Rent shall be payable as of the beginning of the Term unless Landlord is unable to give possession. In that case rent shall be payable as of the date possession is available. Landlord will notify Tenant as to the date possession will be available.

3. Rent, added rent The Rent stated above must be paid on the execution of this Lease and each 30 day anniversary thereafter. Landlord need not give notice to pay the rent. Rent must be paid in full and no amount subtracted from it. The first month's rent shall be paid when Tenant signs this Lease. Tenant may be required to pay other charges to Landlord under the terms of this Lease. They are to be called "Added Rent." This Added Rent is payable as Rent, together with the next monthly Rent due. If Tenant fails to pay the Added Rent on time, Landlord shall have the same rights against Tenant as if Tenant failed to pay Rent.

4. Security Tenant has given NO Security to Landlord.

5. Services Landlord will supply: (a) heat as required by law, and (b) hot and cold water for the bathroom and kitchen sinks. Stopping or reducing of service(s) will not be reason for Tenant to stop paying rent, to make a money claim against Landlord or to claim eviction. Damage to the equipment or appliances supplied by Landlord caused by Tenant's act or neglect, may be repaired by Landlord at Tenant's expense. Such repair cost will be Added Rent.

Tenant does not pay for: electric, gas, telephone and other utility services used in the Apartment. Landlord may stop service of any required plumbing, heating, electric, elevator or air cooling systems, if required by accident, emergency, repairs, or changes. This stoppage of service may continue until the required work has been completed. If unable to supply any service because of labor trouble, Government order, lack of fuel supply or other cause beyond Landlord's control, Landlord need not supply that service until Landlord is able to supply it.

6. Repairs Tenant must take good care of the Apartment and all equipment furnishings and fixtures in it. Tenant must, at Tenant's cost, make all repairs and replacements whenever the need results from Tenant's act or neglect. If Tenant fails to make a needed repair or replacement, Landlord may do it. Landlord's expense will be Added Rent.

7. Alterations Tenant must obtain Landlord's prior written consent to attach anything to the Apartment's, walls, stairs, or ceiling, such as panelling, flooring, built-in decorations or partitions; or make alterations, paint or wallpaper the apartment. Tenant must not change the plumbing, ventilating, air conditioning, electric, heating systems, furnishings or decor. If landlord gives consent, the alterations and installations shall become the property of Landlord when completed and paid for, and shall remain with and as part of the Apartment at the end of the Lease. Landlord has the right to demand that Tenant remove the alterations and installations before the end of the Lease. The demand shall be by notice, given at least 15 days before the end of the Lease. Landlord is not required to do or pay for any work unless stated in this Lease.

8. Late fees, return check fees If Tenant fails to pay rent before the 6th day of the month, Tenant shall pay a late fee of $ 100.00 which shall be Added Rent. If any check given to Landlord by Tenant is returned by the bank, Tenant shall pay a returned check fee of $100.00 which shall be Added Rent.

Press F1 for help | Resolution: 300 x 300 | Dimensions: 3300 x 2550 | Page: 1 of 3 | File Size: 399.44 KB

Select an area on a page for OCR

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Image Document Window:

To OCR a selected area in an image document:

- Use the OCR Zone Cursor to select the area of text on the page you wish to convert to text.
- Drag your mouse over the area to be converted

- In the Tools menu click OCR
- In the Page Range section of the OCR dialog box choose Selection

- Click OK

Notes

- When you OCR text in text zones only, the converted text is single-column,
- The sequence number in the upper left corner of the zone indicates the order in which text zones are processed by OCR, and therefore the order in which they appear in the converted document. You can change the sequence number to reorder text block processing and output. Select the zone and click the right mouse button, then click Properties.
- If zones overlap, shared areas are processed with the top zone, that is, the zone with the lower zone number.
- If you are converting a scanned black and white document, remove speckles before you convert.

Specifying an OCR Training File

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To specify an OCR training file:
- From the Tools item of the Menu Bar, and click Optical Character Recognition.
- Click Options.
- In the Training file box, click the file you want to use, or click Browse to specify another file. If you specify None as the training file, training does not occur.

Tips:
- The Standard training file is empty when Imaging is installed, and so initially contains no data for effective training. You can add words to the file during interactive training.
- The training file you specify is used to improve recognition every time you do OCR. However, to do interactive training and to add words to the training file, you must first enable interactive training and then initiate OCR on the Tools menu.
- OCR is faster when training is not occurring. To speed up the OCR process, specify None as the training file.
- A training file compares characters, while an OCR dictionary compares words. To further improve conversion results, also specify an OCR dictionary to verify acronyms and special terminology.

Training OCR

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑   Small Business

Training the OCR process:

To improve OCR results, train the OCR process to recognize characters more consistently each time they are encountered. To train the OCR process, specify a training file that contains training information.

A training file matches patterns. The contents of a training file are special characters that are difficult to recognize during OCR. To improve conversion results, the reliable characters of a training file are compared with questionable characters in the input document.

The Standard training file that is included with DocuXplorer is initially empty. To place training information in it, you add to it interactively, during the OCR process. You can also create a new training file , and add to it during interactive training. In fact, it can be useful to build several training files, containing different information, for recognizing distinctive fonts or special characters in different categories of files.

Interactive training consists of specifying a training file, enabling interactive training , then monitoring the OCR process and seeing the words that are designated as questionable. When a highlighted questionable word appears, you can correct it and add it to the training file, and so continue to improve word recognition in subsequent OCR sessions.

After you have information in a training file, and you specify that file for training , training occurs each time you do OCR, whether or not you do interactive training. For example, when you OCR from the toolbar or from the Edit menu, with Copy As Text, training occurs automatically in the background, although data is not added to the training file. That is, when you specify a training file, the contents of the file are always used for comparison during OCR of the input document.

Enable Interactive Training in the OCR Process

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To enable interactive OCR training:
- From the Tools item of the Menu Bar, click Optical Character Recognition.
- Click Options.
- Verify that a file name appears in the Training file box. If you specify None, you cannot enable training.
- Click the Enable interactive training box to check it.

Tips:
- To do interactive training and to add words to the training file, you must Initiate OCR from the Tools menu.
- The training file you specify is used to improve recognition every time you do OCR, regardless of how you initiate the process, and whether or not you do interactive training.

Create an OCR Training File

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To create an OCR training file:
- From the Tools item of the Menu Bar, click Optical Character Recognition.
- Click Options.
- In the Save Inbox, click the location where you want to keep the training file.
- Below the Save Inbox, double-click the folder you want for the training file.
- Type the name of the new, empty training file in the File name box, and click Save.

Tips:
- You can add training information to a training file during interactive training. You cannot edit the file.
- You can improve conversion results by creating and using different training files for different categories of documents with similar terms or special characters. For example, if you regularly scan documents with distinctive font styles, include samples of them in a training file.

Compress Image Size

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the Tools item of the Menu Bar, select Compress Image

By choosing this option DocuXplorer will attempt to compress the document to its smallest possible size. Reduction of file size is accomplished using standard compression technologies such as CCITT Group 4 and JPEG.

More about using image compression options

Manually Crop a page in a Scanned Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

To crop a page in a Scanned Document use the Image Document Window :

- From the Edit menu Select, Select Image Cursor
- Once you have selected the area to be cropped, select Tools Manually Crop Selected Page

Image Batch Processing

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

From the Tools menu in the Image Document Window, click Batch Image Processing

This command opens a dialog box allowing you to create a batch of image enhancement processes to use on an image document.

The image enhancement processes available are:

Remove Speckles

Auto Straighten

Auto Crop

Convert pages to text (OCR)

Rotate pages

Compress Image Size

To process a batch of image enhancements on a document:
- Select which enhancement processes are needed
- Select all pages or a group of pages to process
- Click the Process button

Remove Speckles from a Scanned Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

To remove speckles from a Scanned document:
- From the Image Document Window Tools menu, click Remove Speckles to eliminate random dots and specks.

Tip:

To improve OCR results, remove speckles from a scanned document before you convert it to text.

Rotate Selected Pages

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

From the Image menu in the Image Document Window, click Rotate Select Pages

To rotate selected pages;
- Select the pages you wish to rotate in the thumbnail view by using the standard Windows conventions.

Tip:

To select a series of pages click the first page and holding down the Shift Key click the last page. To select a number of non-contiguous pages click each page while holding down the Ctrl Key.

Rotate All Pages

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

From the Image menu in the Image Document Window, click Rotate All Pages

To rotate all pages in a document:
- In the Image Menu of the Image Document Window choose one of the three options from the Rotate All Pages sub-menu. The three options are Left, Right, or Flip.

Straighten a page in a Scanned Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑　Small Business

To straighten a page in a Scanned Document use the Image Document Window :

- On the Tools menu, click Auto Straighten to let the program determine the straightening line. Sometimes this function does not effectively straighten the page, when that happens use the Manual Straighten procedure to correct.

Or

- From the Menu Bar select the Tools menu and click Manual Straighten.
- Drag the cursor to draw a reference line. For example, to straighten tilted text so that it is horizontal, draw a line under the text.
- Click OK or Apply to straighten the page by the angle of the line you drew.

The Associated Application Document Window

About the Associated Application Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Associated Application Document Window contains two panes, Document Information and Document Preview.
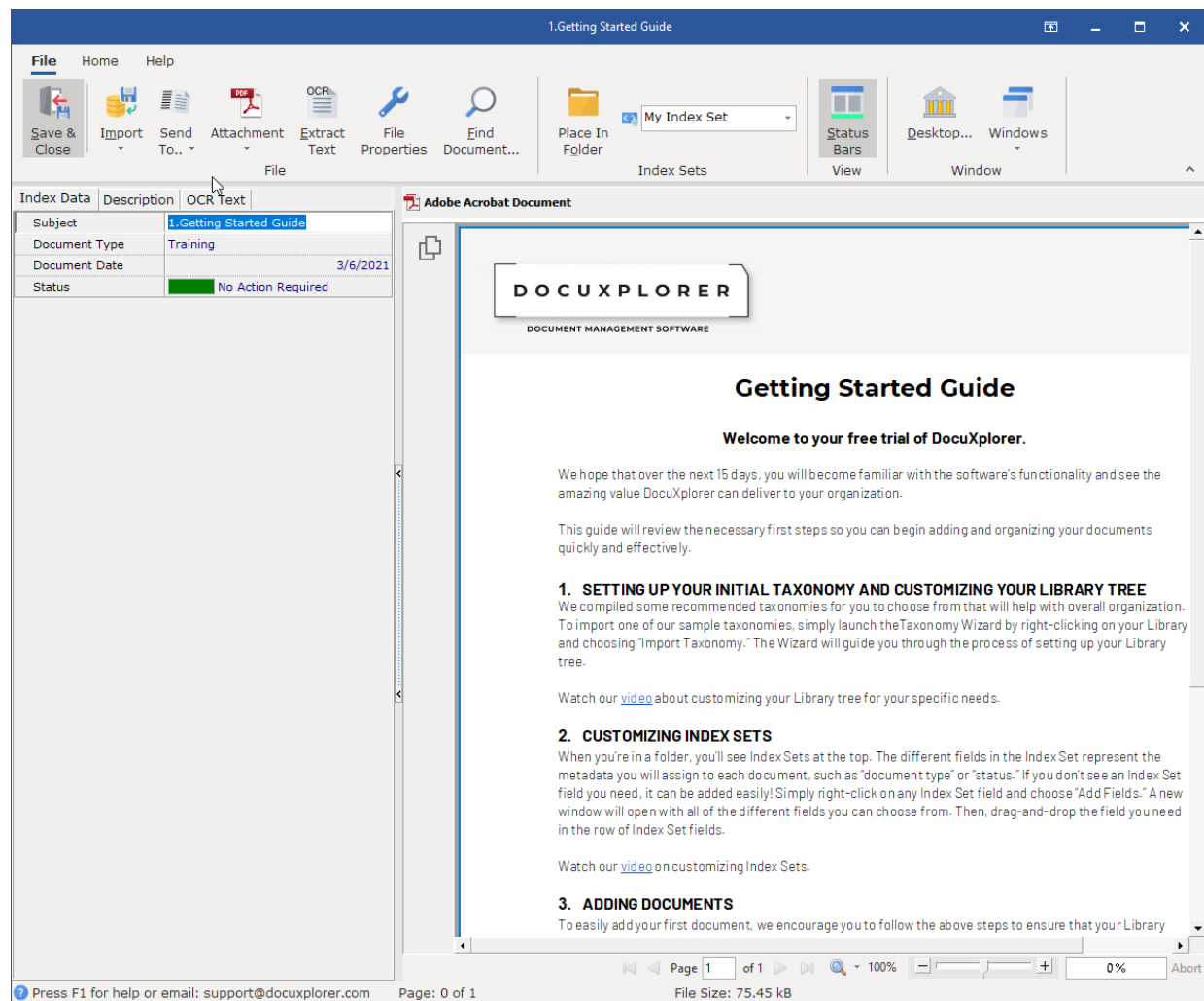
The Document Information Window:

- The Index Data Tab contains the index fields associated with a document. The Index Set determines the Index Fields displayed and the display for each document.
- The Description or Memo Field Tab contains searchable memo text created by users. This tab name will change based the setting in the Preview Column. If the Description or any other memo field is not being display then "Not Selected" is the default that has been set for the Preview Column.
- OCR Text Tab contains the searchable electronic text of a PDF document resulting from the use of the Extract Text function of DocuXplorer .

The Document Preview Window
- The Preview Tab displays the document
- The Icon Tab displays an icon representing the document's native program. Clicking on the document icon will open the document in its native program.
- You can Hide or Show the Attachment by clicking the Attachment menu and selecting Hide or Preview Attachment menu item

DocuXplorer uses six different technologies to view Word, Excel, Pdf, Email, html and OLE content. In addition DX can read and write native Word and Excel files.

DOCUXPLORER

Financial Sample

Save & Close | Import | Send To.. | Attachment | Extract Text | File Properties | Find Document... | Place In Folder | My Index Set | Status Bars | Desktop... | Windows

File — Index Sets — View — Window

| Index Data | Description | OCR Text |

Subject	Financial Sample
Document Type	
Document Date	3/9/2021
Status	No Action Required

Microsoft Excel Worksheet

	A	B	C	D	E	F	G	H
1	Segment	Country	Product	Discount Band	Units Sold	Manufacturin	Sale Price	Gross Sales
2	Government	Canada	Carretera	None	1618.5	$ 3.00	$ 20.00	$ 32,370.
3	Government	Germany	Carretera	None	1321	$ 3.00	$ 20.00	$ 26,420.
4	Midmarket	France	Carretera	None	2178	$ 3.00	$ 15.00	$ 32,670.
5	Midmarket	Germany	Carretera	None	888	$ 3.00	$ 15.00	$ 13,320.
6	Midmarket	Mexico	Carretera	None	2470	$ 3.00	$ 15.00	$ 37,050.
7	Government	Germany	Carretera	None	1513	$ 350.00	$ 15.00	$ 529,550.
8	Midmarket	Germany	Montana	None	921	$ 5.00	$ 15.00	$ 13,815.
9	Channel Partners	Canada	Montana	None	2518	$ 5.00	$ 12.00	$ 30,216.
10	Government	France	Montana	None	1899	$ 5.00	$ 20.00	$ 37,980.
11	Channel Partners	Germany	Montana	None	1545	$ 5.00	$ 12.00	$ 18,540.
12	Midmarket	Mexico	Montana	None	2470	$ 5.00	$ 15.00	$ 37,050.
13	Enterprise	Canada	Montana	None	2665.5	$ 5.00	$ 125.00	$ 333,187.
14	Small Business	Mexico	Montana	None	958	$ 5.00	$ 300.00	$ 287,400.
15	Government	Germany	Montana	None	2146	$ 5.00	$ 7.00	$ 15,022.
16	Enterprise	Canada	Montana	None	345	$ 5.00	$ 125.00	$ 43,125.
17	Midmarket	United States of America	Montana	None	615	$ 5.00	$ 15.00	$ 9,225.
18	Government	Canada	Paseo	None	292	$ 10.00	$ 20.00	$ 5,840.
19	Midmarket	Mexico	Paseo	None	974	$ 10.00	$ 15.00	$ 14,610.
20	Channel Partners	Canada	Paseo	None	2518	$ 10.00	$ 12.00	$ 30,216.
21	Government	Germany	Paseo	None	1006	$ 10.00	$ 350.00	$ 352,100.
22	Channel Partners	Germany	Paseo	None	367	$ 10.00	$ 12.00	$ 4,404.
23	Government	Mexico	Paseo	None	883	$ 10.00	$ 7.00	$ 6,181.
24	Midmarket	France	Paseo	None	549	$ 10.00	$ 15.00	$ 8,235.
25	Small Business	Mexico	Paseo	None	788	$ 10.00	$ 300.00	$ 236,400.
26	Midmarket	Mexico	Paseo	None	2472	$ 10.00	$ 15.00	$ 37,080.
27	Government	United States of America	Paseo	None	1143	$ 10.00	$ 7.00	$ 8,001.
28	Government	Canada	Paseo	None	1725	$ 10.00	$ 350.00	$ 603,750.
29	Channel Partners	United States of America	Paseo	None	912	$ 10.00	$ 12.00	$ 10,944.
30	Midmarket	Canada	Paseo	None	2152	$ 10.00	$ 15.00	$ 32,280.
31	Government	Canada	Paseo	None	1817	$ 10.00	$ 20.00	$ 36,340.
32	Government	Germany	Paseo	None	1513	$ 10.00	$ 350.00	$ 529,550.
33	Government	Mexico	Velo	None	1493	$ 120.00	$ 7.00	$ 10,451.
34	Enterprise	France	Velo	None	1804	$ 120.00	$ 125.00	$ 225,500.
35	Channel Partners	Germany	Velo	None	2161	$ 120.00	$ 12.00	$ 25,932.
36	Government	Germany	Velo	None	1006	$ 120.00	$ 350.00	$ 352,100.
37	Channel Partners	Germany	Velo	None	1545	$ 120.00	$ 12.00	$ 18,540.
38	Enterprise	United States of America	Velo	None	2821	$ 120.00	$ 125.00	$ 352,625.
39	Enterprise	Canada	Velo	None	345	$ 120.00	$ 125.00	$ 43,125.
40	Small Business	Canada	VTT	None	2001	$ 250.00	$ 300.00	$ 600,300.
41	Channel Partners	Germany	VTT	None	2838	$ 250.00	$ 12.00	$ 34,056.
42	Midmarket	France	VTT	None	2178	$ 250.00	$ 15.00	$ 32,670.

Sheet1

Press F1 for help or email: support@docuxplorer.com   Page: 0 of 0   File Size: 57.53 kB
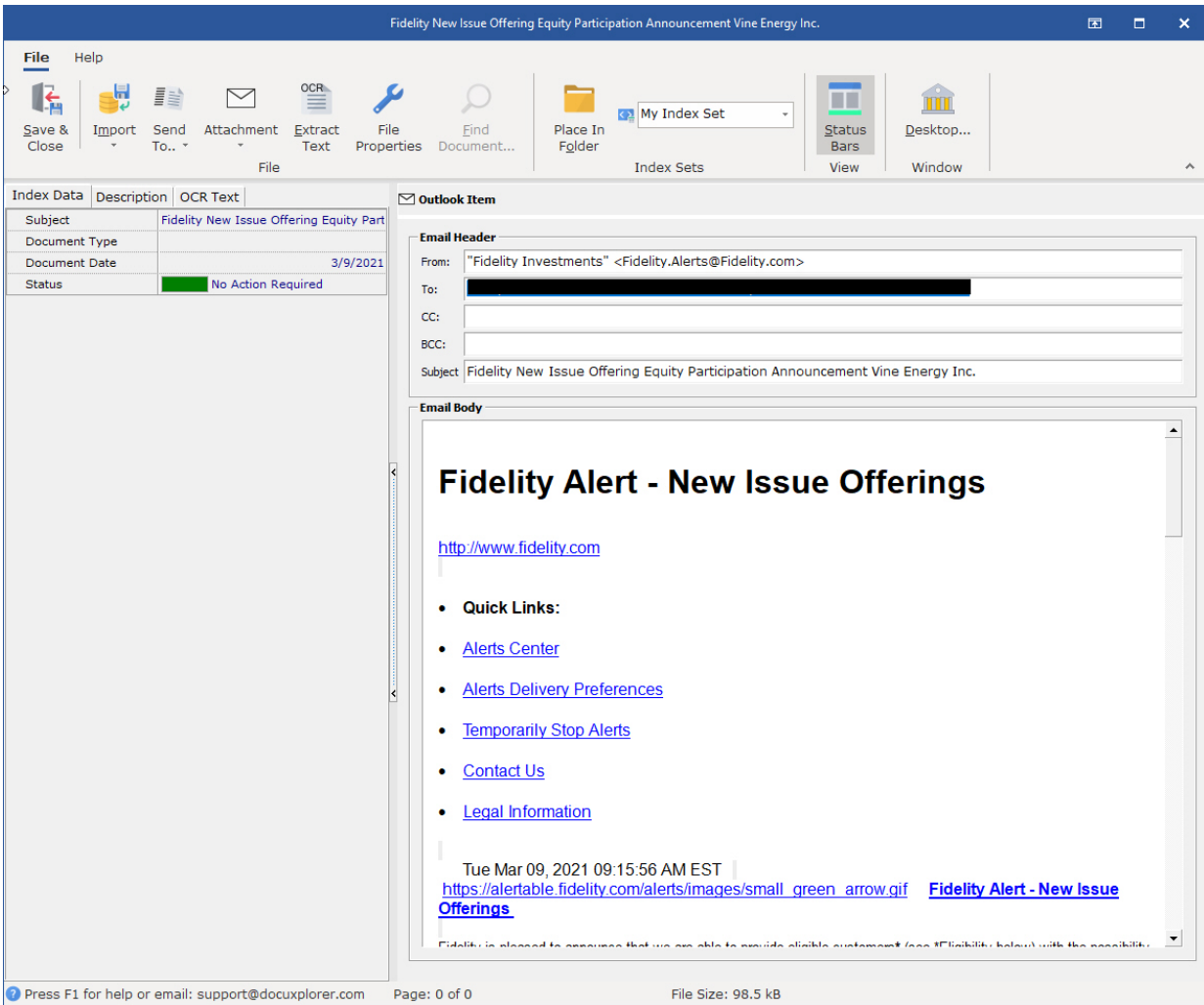
The browser viewer uses the operating system's Internet Explorer technology to display documents. If a document can be displayed in Internet Explorer then the document can be displayed in the DocuXplorer Associated Application Preview Pane. The right-click menu in the preview pane will display functions that can be performed based on the document's native application. The ability to save any modifications made in the preview pane will depend on the native application.
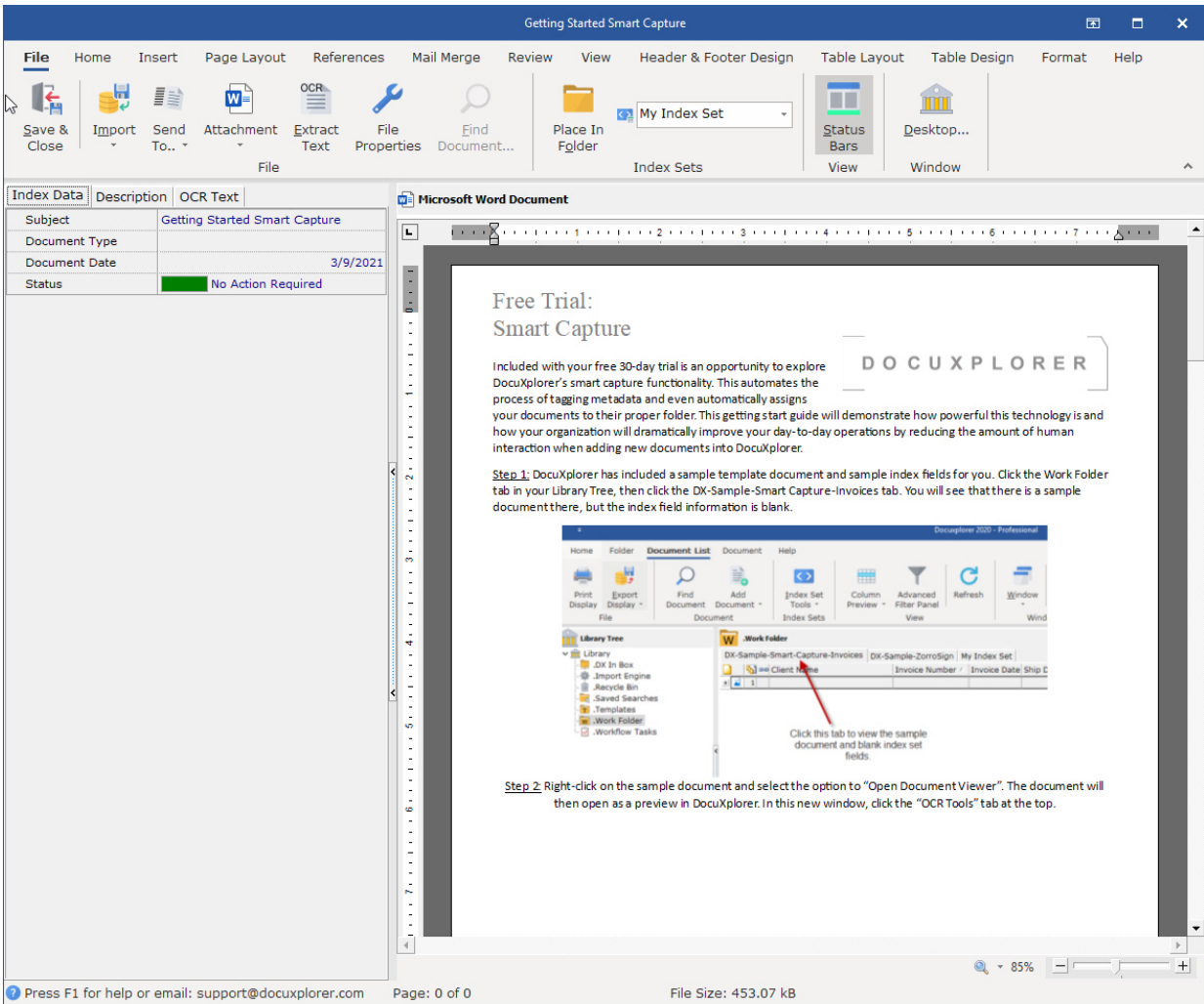
When adding an associated application document to DocuXplorer an Internet Explorer dialog box may appear that asks if you would like to open or save the document. Choose Open to preview the document in the Preview Pane.
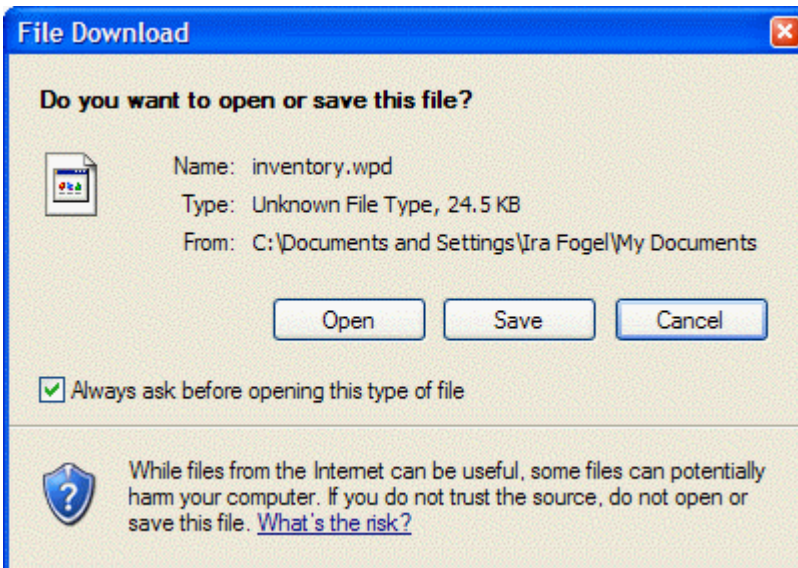
Unchecking the "Always ask before opening this type of file" will allow the file type to automatically open the Preview Pane, it will also automatically open documents of this file type encountered on web site using Internet Explorer. It is recommended that if you often view a file type in DocuXplorer that you select to Open the file type and uncheck the Ask always box to more easily add documents of the file type to DocuXplorer.

Some file types can not be displayed using Internet Explorer. When a document is added to your Library where the file type can not be displayed the Document Window will instead display an icon representing the document's native program.

Tip:

File types from programs that do not display in a browser should be removed from the file extension list found in Tools/Options/Document Defaults. Check with the file type's original program for compatibility when attempting to view a file in a browser.

For example, in Adobe Acrobat you will need to set the program to allow display of a PDF in a browser. To set Acrobat to display PDF in a browser see Troubleshooting/PDF does not display in document viewer.

Import in the Associated Application Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Import function of the Associated Application Document Window allows a user to import a new file to be associated with the index information already entered.

For documents other than a PDF document the new file attachment will replace the original attachment. If the original document attachment is a PDF file a user can append an additional PDF file to the original PDF file attachment.

Note:
When using the append function only PDF files may be appended to an existing PDF file. The browser window that appears when appending a file will only display PDF files.

To import a document in the Associated Application Document Window:
- From the File menu choose Import
- If the document is a PDF you can choose either New or Append
- If the document is other than a PDF file choose New
- Select the document to import from the browser window
- Click Open

Cut, Copy and Paste in the Associated Application Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   **Small Business**

To cut an Associated Application document in the Associated Application
Document Window:
- Select the Associated Application Icon
- From the Edit menu choose Cut
- Open the Associated Application document viewer you are pasting to
- From the Edit menu choose Paste

To copy an Associated Application document in the Associated Application
Document Window:
- Select the Associated Application Icon
- From the Edit menu choose Copy
- Open the Associated Application Document Window for the document to copy to
- From the Edit menu choose Paste

Tip:

If you paste an Associated Application into a Document Window it will replace the existing document attachment

Change color or font in the Document Description

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

In a Document Window/Description Tab:

To change the font in a document description:
- ▪ Click on the right mouse button
- ▪ Choose a new font, style, size and color
- ▪ Click OK

Ribbon in the Associated Application Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The ribbon in the Associated Application Document Window contains icons that allow you quick access to frequently used functions.
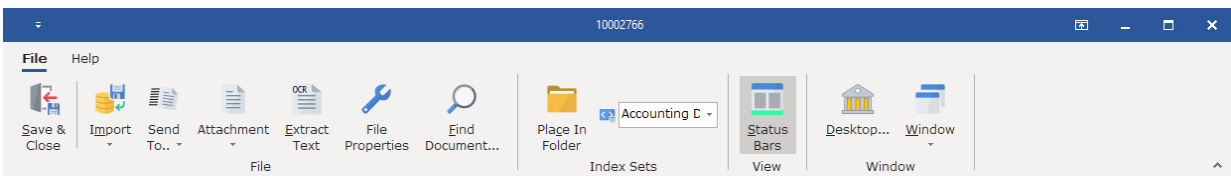
- Save and Close - Save the current document and close the window
- Import - Allows the user to append, insert or create a new document from the operating systems filing system
- Send To - Allows the user to send the document to a windows folder, email, workflow or default printer
- Attachment
  - Open Attachment - Open the attachment with the program registered for the file extension of the attachment
  - Close Attachment - Close the application that open the attachment
  - Hide Preview - Hide / Shows the preview of the attachment
  - Delete Pages - Deletes pages of PDF documents
  - Delete Attachment - Removes the attachment but maintains the index information
- Extract Text - DX will attempted to extract the documents text via Microsofts ifilter service. If that fails and the file type is a .pdf DX will convert the file to a .tif file and perform an OCR process to acquire the text.
- File Properties - Show the list of the document extended meta data stored in the document it self
- Find Document - Allows the user to access the Find Document dialog and to locate other documents
- Place in Folder - provides a browse window to select a location for a saved document. When adding a new document to DocuXplorer you can select to place the document in a Folder other than the Folder in focus, this is accomplished using the Toolbar item <Place in Folder>. When using <Place in Folder> and changing the storage location of the document to a Folder other than the one in focus; the Index Set display in the Document Window will change to display the default Index Set for the Folder selected. This

feature is only able when adding a new document. When changing a location for a previously saved document the Index Set will always display the Index Set associated with the document.

- [Index Set](#) - Allows the user to select an index set other than the current one for the document indexing process
- Status Bar - Show the use file information and progress information when longer process are executed
- Desktop - Allows the user to navigate quick back to the Dx desktop
- Window - Allows the user to see a list of open document for which the can quickly navigate to

Status Bar in the Associated Application Document Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

The Status Bar in the Associated Application Document Window will give you information on the document's size in kilobytes.

Add a document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

In our efforts to make DocuXplorer as easy and flexible as possible we have provided users with multiple ways to add a document from within DocuXplorer and from other applications, they are:

- Scan a document directly to Folder
- Quick Scan a document directly to Folder
- Import a document directly to Folder
- Add an Index Information Only Document
- Add a document from the DX Inbox
- Print an image of a document using the Print to DocuXplorer Driver
- Drag and drop a document from Windows Explorer
- Copy and Paste from Windows Explorer
- Add a document from Windows Explorer using the Send To command
- Add a document using the command line
- Adding documents from Microsoft Office applications
- Adding documents using the optional QuickBooks Integration Utility
- Create a new document from a Template

Important Notes for adding documents:

1. Documents are profiled with index information entered in an Index Field. Index Fields are assigned to Index Sets. Index Sets are created to profile a particular type of document (invoice, contract, etc.). When adding a document choose an Index Set from the "Index Set View" drop down list on the toolbar to accurately profile that document.

2. Documents are stored in Folders. Folders always have an Index Set associated as a default either the All Documents Index Set or a User-Defined Index Set. Documents added to a Folder will be added with the Folder's default Index Set as their associated Index Set.

3. When adding a new document to DocuXplorer you can select to place the document in a Folder other than the Folder in focus, this is accomplished using the toolbar item <Place in Folder>. When using <Place in Folder> and changing the storage location of the document to a Folder other than the one in focus; the Index Set display in the Document Window will change to display the default Index Set for the Folder selected. This feature is only available when adding a new document. When changing a

location for a previously saved document the Index Set will always display the Index Set associated with the document.

4. When adding documents the program will automatically populate the Subject Field with the attachment file name, subject of an email when captured from Outlook using the MS Office Integration or in the case of a scanned in document with the date and time of the scan if no other data is entered.

5. When adding a new document to DocuXplorer, if a change is made to an image document before Saving and Closing in DocuXplorer those changes will be saved in both the document added to DocuXplorer and the original file remaining on the hard drive. Changes made to documents other than an image document will be determined by their native program.

To add a document directly to a folder:

- From the Library Tree select the Folder to add the document
- Click on the Add Document icon on the toolbar
- Choose the type of document you would like to add either; Quick Scan, Scanner/Camera, Import, or Index Information Only

Scan Documents - Scanned documents always default to TIFF images. With the DocuXplorer Print Driver installed you can set DocuXplorer to automatically convert all scanned images to PDF for storage in the DocuXplorer Library.

Tip:

See this link for information on PDF and Full Text Search

Scanner/Camera

- Click "New" in the Scan Document Window
- Click "Append" or "Insert" to add more pages to the document if needed
- Click "Save & Close" to index and store your document
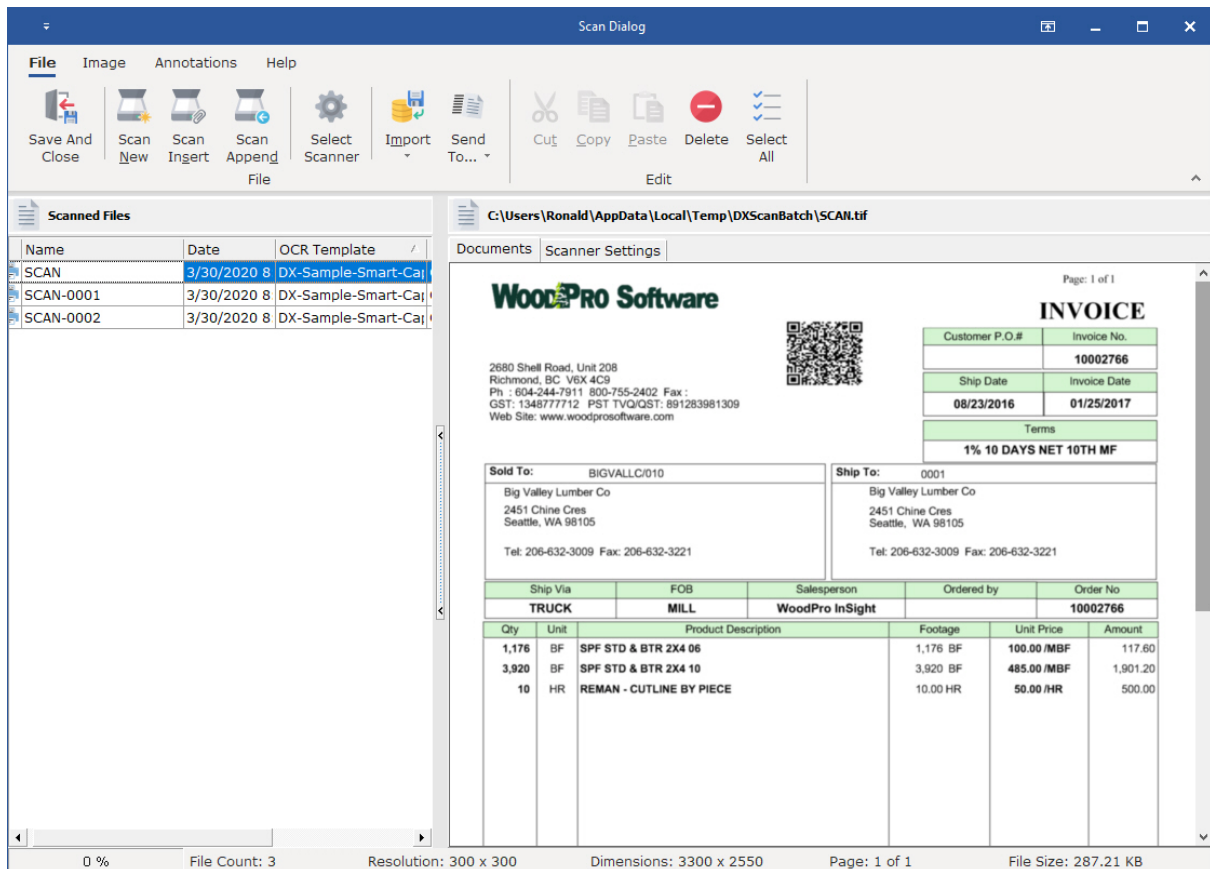
- Choose an Index Set from the drop down list in the Document Window
- Enter index information into data fields
- Click Save and Close

Quick Scan

The Quick Scan function allows you to bypass displaying the Show Scanner Interface and Scan Preview Window to quickly and simply add a document to the folder

- Make sure you have properly set defaults in the scanner's TWAIN Interface
- Select the folder to add a document to
- Click the Add Document button
- Select Quick Scan

Tip:

Set your TWAIN interface to scan the most common type of document you deal with, for example; letter-size, single-sided, black and white, 200 dpi. Then use Quick Scan for your normal daily scans. When you need to scan a document that does not fit the norm, a double-sided document for instance, use the Scanner/Camera method of adding scanned documents making sure it is set to Show Scanner Interface so that you can change the scanner default to

accommodate your new document. Make sure to reset your scanner interface to the common defaults for use with Quick Scan after scanning the new document is complete.

Import

- Select a document or group of documents from the Import File dialog box
- Click Open

- Choose an Index Set from the drop down list
- Enter index information into data fields
- Click Save and Close

Index Information Only

- Choose an Index Set from the drop down list
- Enter index information into data fields
- Click Save and Close

Tip:

You can add an attachment to an Index Information Only Document at any time. From the File menu you can either scan or import an image or electronic file to attach to the Document.

To add a document through the DX Inbox:

- Select the DX Inbox from the Library Tree
- Locate the folder containing the document to import on a local or network drive
- Drag and drop the document to a Folder in DocuXplorer
- Choose an Index Set from the drop down list
- Enter index information into data fields
- Click Save and Close

Tip:

- Users can drag and drop multiple documents to a Folder from the DX Inbox
- Click the magnifying glass icon in the upper right of the DX Inbox Window to open the folder locate browse screen
- If multiple documents are added to a Folder using this method they will be saved with the document's original file name as the Subject. Users can then add index data using the Folder Contents List edit mode or the Document Viewer Window for each document.

To add a document using the DocuXplorer PDF Print Driver:

- Open DocuXplorer

- From any Windows program find the Print command (usually in the <File> menu)
- Click on Print
- From the drop down list of printers choose DocuXplorer-PDF
- Click the Print Button and the Document Viewer will appear
- Choose the default location or click Place in Folder to choose a different location
- Choose an Index Set from the drop down list
- Enter index information into data fields
- Click Save and Close

Tip:

You can choose the Folder in DocuXplorer prior to printing to DocuXplorer and skip the step to locate the folder for storing your document.

[To drag and drop a document from Windows Explorer](#)

- Open Windows Explorer and DocuXplorer in windows side by side
- Select the document or documents to add from Windows Explorer
- Drag and drop the selected document to a DocuXplorer Folder
- Choose an Index Set from the drop down list
- Enter index information into data fields
- Click Save and Close

Tip:

If multiple documents are added to a Folder using this method they are saved with the document's original file name in the Subject Field. Users will need to open the Viewer for each document to properly enter their index data.

[Copy and Paste from Windows Explorer](#)

- From Windows Explorer highlight the file or files to be added to DocuXplorer
- Select the DocuXplorer Folder to copy to
- Right click the Folder icon or in the Folder Window to bring up a menu
- Select Paste from Explorer
- Choose an Index Set from the drop down list or use the folder's default Index Set
- Enter index information into data fields
- Click Save and Close

Tip:

If multiple documents are added to a Folder using this method they are saved with the document's original file name in the Subject Field. Users will need to open the Viewer for each document to properly enter their index data.

To add a document from Windows Explorer using the Send To command (available only in DocuXplorer Enterprise and Professional)
- Right click the document to import in Windows Explorer
- Click Send To and select DocuXplorer

When a single document is selected;
- If DocuXplorer is closed, it will automatically open and display the Document Window for you to select an Index Set and location for the imported document. If you do not choose a location for the Document it will default to the Work Folder in the Library.
- If DocuXplorer is running the Document Window will open with the document located in the highlighted Folder

When multiple documents are selected;
- If DocuXplorer is closed it will automatically open and place the documents in the default Work Folder
- If DocuXplorer is running the imported documents will be place in the highlighted Folder ready to be opened, indexed and moved to a Cabinet Folder.

Tip:

You may import multiple documents with this method but you will need to limit the number of documents added. If too many documents are added at the same time you will receive the error "Access to the specified device, path or file is denied". To avoid this error the number of characters for the command must not exceed 254.

To add a document using the command line;
- From the Start button select Run
- Type DocuXplorer.exe <file name to be added>
- Click OK

Tip:

The same rules apply here as with the "Send To" command. You may import multiple documents with this method but you will need to limit the number of documents added. If too many documents are added at the same time you will receive the error "Access to the specified device, path or file is denied". To avoid this error the number of characters for the command must not exceed 254.

Tip:

To add documents using a third party print driver, see the Knowledge Base article on Using Third Party Print Drivers

Scanning in a New Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Scanning in a new document is accomplished using either the Quick Scan option or the Scanner/Camera option which allow you to show the Scanning Preview Window. Your scanner and its TWAIN driver must be installed to scan in documents. Scanned documents will default to TIFF image format. With the DocuXplorer Print Driver installed you can set DocuXplorer to automatically convert all scanned in documents to PDF by either checking the box in Tools/Options/Image Processing for Quick Scan documents or selecting the Convert to option in the Advanced tab of the Create Scanned Document Preview Window at the time of scan.

Tip:

- Scanning a document with a network scanner is accomplished using the network scanner's scanning software. You can then use the [DX Inbox](#) option to import the scanned documents directly to a DocuXplorer folder
- If you are having problems scanning in a document, please check your scanner's documentation for troubleshooting information.
- In order to reduce an image's disk space requirements choose a [scanning resolution](#) that will give you the highest quality image and the smallest file size.

Scanner/Camera - Scanning Preview Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The **Scanning Preview Window** is the interface used when scanning documents into DocuXplorer with the Scanner/Camera menu selection.

 In the Scanning Preview Window you can select TWAIN devices, scanning resolution and compression, set up batch scanning and preview of pages after scanning is completed for quality assurance.

right-click the Page Preview Image for a menu that allows you to delete pages from the scan and change the display of the Page Preview.

Settings

The Settings tab displays basic scanner settings, batch scanning operations and scanner device selection.

Scan Mode - allows you set the mode for most TWAIN devices. The selection list is populated based on the scanners modes it supports.

Resolution - allows you to select the document scan resolution.

> While every effort is made to pass these settings to the scanner's interface, some scanners will not accept the changes. Always check the scanner's interface program (TWAIN) to ensure that the settings are the same as in DocuXplorer the first time a document is scanned. If they are different and the settings were changed in DocuXplorer, change the settings in the scanner's interface to match those set in DocuXplorer. Use this same technique for any future changes to the settings.

Transfer Mode - This option can help with scanning performance.

> TWSX_NATIVE mode is the default mode. In this mode, the whole image is transferred in a single memory block. when transferring large images that might encounter memory limitations with Native mode.

TWSX_FILE / FILE mode is not required by TWAIN specification. In this mode, the image is transferred to a specified file directly. The disk file mode is ideal

TWSX_MEMORY / MEMORY mode is also required by TWAIN, like NATIVE mode. Although this mode is the most complex, Dynamic TWAIN handles the transfer details, making it as simple as NATIVE mode.

Show Scanner Interface - DocuXplorer will display your scanner's TWAIN interface allowing you to change scanning size and resolution. If checked, the Show Scanner Interface feature will override any settings made in the Scanner Settings portion of this dialog box.

Invert Image - allows images to be inverted (white text on black background) while scanning.

Remove Blank Pages - Removes blank pages based on the Whiteness of a page via the Blank Page Tolerance settings

Convert to: After scanning has been completed and before it saved to the database the select DocuXplorer print driver will convert the document. The conversion process supports the DocuXplorer PDF Print Driver or Peernet e-TIFF 9.0 driver. The DocuXplorer PDF Print Driver is the default setting. The Peernet e-TIFF 9.0 driver is 3rd party software not supplied with DocuXplorer. Select the default print driver in Tools | Options | Workstation dialog box.

Use Memory Handle - Most scanner work properly with this option checked. if you find your scanner is not working properly you can adjust this setting along with Transfer Mode to find your scanner proper settings.

Log Scanner Activity - When checked DX will create a log of the scanners activity for review. Its placed in the DXScanLog under the users TEMP folder

Use **Select Scanner** to choose any scanner or digital camera device attached to the workstation. Only devices with a TWAIN driver will be displayed in the Select Device dialog.

[Batch Scanning](#)

Create a new document every # pages - if checked DocuXplorer will create a new document after the indicated number of pages has been scanned. This allows you uninterrupted scanning of documents with the same number of pages in a document.

Create new document every blank page - this can be used in conjunction with the prior option and creates a new document when every a page has no text on it.

Document prefix - Set the scanned document default file name. newly scanned document are store in the users ..\Temp\DXScan folder until save in DocuXplorer

Tip:

Not all TWAIN devices are able to take advantage of this feature; some devices such as digital cameras and certain scanner TWAIN device drivers do not allow DocuXplorer to override their default settings.

Index all scanned documents

When this is option is checked all scanned documents are index by the user once the Save and Close button is selected. When this options is unchecked all scanned documents are imported directly in to the selected folder to be index at another time. The default setting is checked.

DOCUXPLORER

Batch Scanning

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Batch Scanning in DocuXplorer can be accomplished using two methods. Users can scan all pages to a single (TIFF) image document then create multiple new documents from the single scan session, or scan in multiple documents based on the number of pages in a document.

Tip:

Using the Create New batch scan process requires that you scan documents as TIFF images. Scanned documents can be converted to PDF after the process of creating all your new documents is complete.

Scan all pages to a single document batch scan session;

- From the Desktop select Add Document | Scanner / Camera or QuickScan
- Scan all pages in as a single document, then press Save and Close to access the Document Image Viewer
- In the Image Document Window select Thumbnails to view all pages scanned
- Select the pages to use in creating a document - hold down the shift key and click the pages to be used for the new document. You can also use the Ctrl key for non-contiguous pages

- Select the location to store to the document using "Place in Folder"

- Select an Index Set to associate with the new document

- Enter the index information
- From the File menu item click Create New

- Select the next group of pages in the Thumbnail View and repeat the process until all new documents are created

Tip:

When new documents are created immediately after scanning in all pages index fields will be empty. After creating the first new documents the index fields will display the information last entered. To clear fields after creating a new

document right-click in the Index Data Window and use the Clear Field Values function. If the document has previously been saved and reopened, index fields will revert to the original data entry when a the Create New feature is used.

Scan and create new documents by groups of pages;

Users can add multiple scanned documents each with the exact same number of pages. The program will create a new TIFF or PDF file at the end of the set number of pages. When scanning is complete and you click Finish in the Scanning Preview Window. The document will be added to the highlighted folder and numbered sequentially with a prefix as the caption in the Subject Field.

Open each document in the batch and use heads-up indexing to enter index information for each document.

Batch Scanning can be accessed from the Create a Scanned Document Window, Advanced Tab.

Set the number of pages for documents in the batch. Choose a prefix for the sequential number or accept the default. Order the pages of your paper documents for scanning and scan.

You can preview each document scanned for quality control and delete and re-scan poorly scanned pages as needed. To preview documents scanned in a batch select the Scanned Document Tab to see a list of documents scanned in the batch. To view, highlight a document and click the Scan Tab to delete, or add pages to a document.

Click Finished when the batch is complete and quality assured.

Tip:
When scanning documents in batches you can use the Replicate Field Value function to enter index data often repeated across fields for the batch

Adding pages to a Scanned Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

To insert a new scanned page to an existing document use the [Image Document Window](#) :

- Open the File menu, click Scan.
- Select the method to add pages to the scanned document
    - New - replaces existing scanned pages
    - Insert - insert new pages in place
    - Append - appends new pages after the last page of the existing document

Tips:

- Move a newly scanned page to a different position in the Thumbnail Tab by dragging and dropping it into place.

Scan Resolution

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Located in the Scan Preview Window/Advanced Tab you can set the resolution to scan in a document.
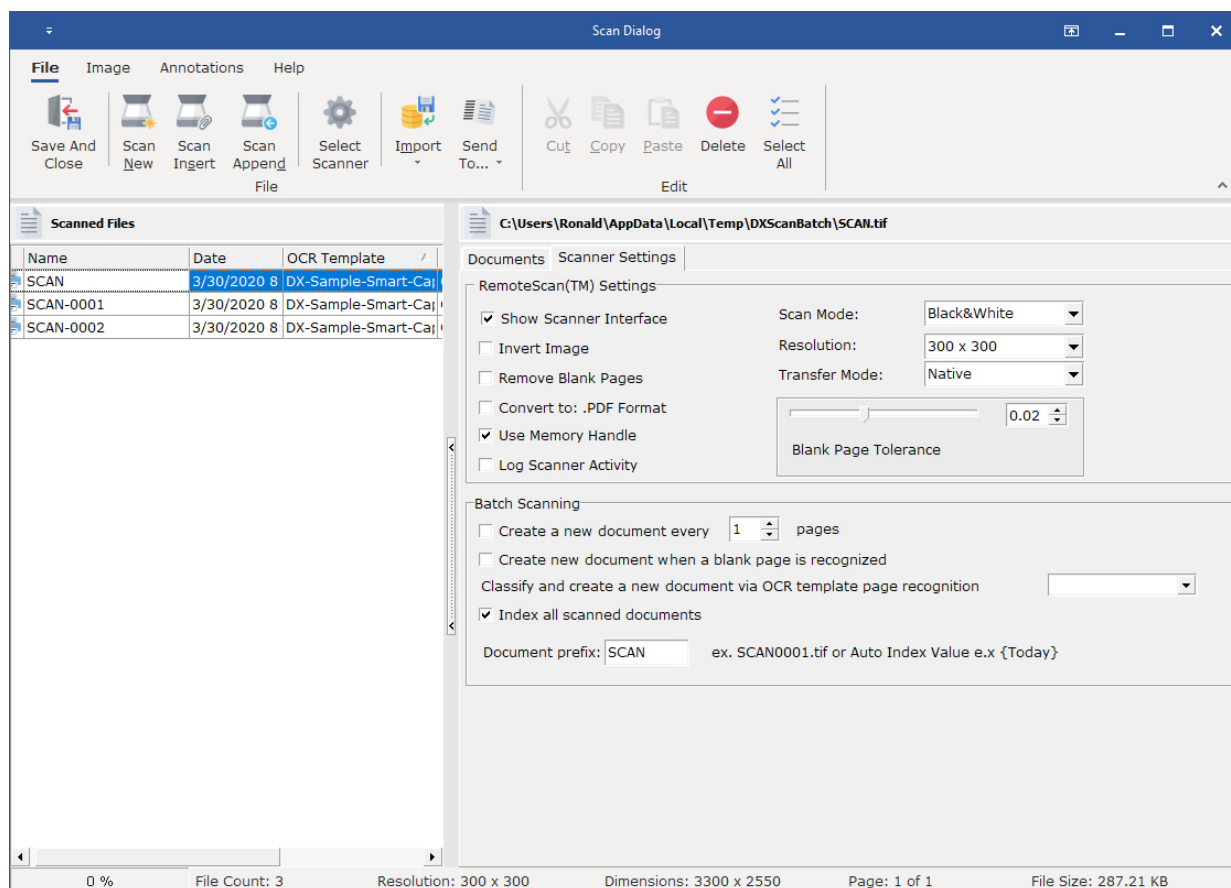
Scanning resolution is measured in dots per inch (DPI) and determines the amount of detail visible in an image. To get the best possible results you should carefully choose the resolution best suited to the image you're scanning. For most Black & White document we recommend B&W at 200x200 for 8.5x11 document.

It is not always necessary to choose the highest possible resolution to get a good quality scan. If the image has little detail or is only black and white, you can use a lower resolution. This helps reduce the size of the file, as images scanned at higher resolutions require more disk space.

You should also consider the capabilities of your output device. If you intend to print the scanned image, you should try to match the scan resolution to your printer's capabilities. An image scanned at 600dpi and printed on a 300dpi printer will result in a 300dpi image. If you intend to edit the image, the scan resolution you choose should be appropriate for your display. For example, if you scan an image at 600dpi and display it at a lower resolution, you won't see all the information, which could make editing details difficult.

The most important thing to remember when choosing a resolution is that you want to get the highest possible image quality without making the file any larger than necessary.

Tip:

OCR conversion generally requires a minimum resolution of 200dpi.

Not all scanner report back during the scanning process what additional adjustments were select via the twain interface. As a result DX will use its default settings as defined in the dialog above.

Scanner/Camera - Scanning Preview Window

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The **Scanning Preview Window** is the interface used when scanning documents into DocuXplorer with the Scanner/Camera menu selection.

 In the Scanning Preview Window you can select TWAIN devices, scanning resolution and compression, set up batch scanning and preview of pages after scanning is completed for quality assurance.

right-click the Page Preview Image for a menu that allows you to delete pages from the scan and change the display of the Page Preview.

Settings

The Settings tab displays basic scanner settings, batch scanning operations and scanner device selection.

Scan Mode - allows you set the mode for most TWAIN devices. The selection list is populated based on the scanners modes it supports.

Resolution - allows you to select the document scan resolution.

While every effort is made to pass these settings to the scanner's interface, some scanners will not accept the changes. Always check the scanner's interface program (TWAIN) to ensure that the settings are the same as in DocuXplorer the first time a document is scanned. If they are different and the settings were changed in DocuXplorer, change the settings in the scanner's interface to match those set in DocuXplorer. Use this same technique for any future changes to the settings.

Transfer Mode - This option can help with scanning performance.

TWSX_NATIVE mode is the default mode. In this mode, the whole image is transferred in a single memory block. when transferring large images that might encounter memory limitations with Native mode.

TWSX_FILE / FILE mode is not required by TWAIN specification. In this mode, the image is transferred to a specified file directly. The disk file mode is ideal

TWSX_MEMORY / MEMORY mode is also required by TWAIN, like NATIVE mode. Although this mode is the most complex, Dynamic TWAIN handles the transfer details, making it as simple as NATIVE mode.

Show Scanner Interface - DocuXplorer will display your scanner's TWAIN interface allowing you to change scanning size and resolution. If checked, the Show Scanner Interface feature will override any settings made in the Scanner Settings portion of this dialog box.

Invert Image - allows images to be inverted (white text on black background) while scanning.

Remove Blank Pages - Removes blank pages based on the Whiteness of a page via the Blank Page Tolerance settings

Convert to: After scanning has been completed and before it saved to the database the select DocuXplorer print driver will convert the document. The conversion process supports the DocuXplorer PDF Print Driver or Peernet e-TIFF 9.0 driver. The DocuXplorer PDF Print Driver is the default setting. The Peernet e-TIFF 9.0 driver is 3rd party software not supplied with DocuXplorer. Select the default print driver in Tools | Options | Workstation dialog box.

Use Memory Handle - Most scanner work properly with this option checked. if you find your scanner is not working properly you can adjust this setting along with Transfer Mode to find your scanner proper settings.

Log Scanner Activity - When checked DX will create a log of the scanners activity for review. Its placed in the DXScanLog under the users TEMP folder

Use **Select Scanner** to choose any scanner or digital camera device attached to the workstation. Only devices with a TWAIN driver will be displayed in the Select Device dialog.

[Batch Scanning](#)

Create a new document every # pages - if checked DocuXplorer will create a new document after the indicated number of pages has been scanned. This allows you uninterrupted scanning of documents with the same number of pages in a document.

Create new document every blank page - this can be used in conjunction with the prior option and creates a new document when every a page has no text on it.

Document prefix - Set the scanned document default file name. newly scanned document are store in the users ..\Temp\DXScan folder until save in DocuXplorer

Tip:

Not all TWAIN devices are able to take advantage of this feature; some devices such as digital cameras and certain scanner TWAIN device drivers do not allow DocuXplorer to override their default settings.

Index all scanned documents

When this is option is checked all scanned documents are index by the user once the Save and Close button is selected. When this options is unchecked all scanned documents are imported directly in to the selected folder to be index at another time. The default setting is checked.

TWAIN Drivers

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The TWAIN Driver is a software interface provided by the image capture device manufacturer that interacts with a TWAIN device such as a scanner or digital camera and your computer and imaging software.

The Scanner's TWAIN Driver interface allows you to set defaults for scan Size, Resolution, Color, Grayscale or Black and White, Brightness, Threshold and Contrast and Simplex or Duplex scanning. These are functions of the scanner's TWAIN Driver. These functions may not available with every scanner. Please see your scanner's TWAIN interface help to determine its functionality.

Add Documents from Windows Explorer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Documents may be added to DocuXplorer directly from Windows Explorer using either the Send To command or Copy and Paste.

To import a document directly from Windows Explorer using Send To:
- Right click the document to import in Windows Explorer
- Click Send To and select DocuXplorer

When a single document is selected:
- If DocuXplorer is closed it will automatically open and display the Document Window for you to select an Index Set and location for the imported document. If you do not choose a location Cabinet, Drawer and Folder) for the Document it will default to the Work Folder in the Library.
- If DocuXplorer is running the Document Window will open with the document located in the highlighted Folder

When multiple documents are selected;
- If DocuXplorer is closed it will automatically open and place the documents in the default Work Folder
- If DocuXplorer is running the imported documents will be placed in the highlighted Folder ready to be opened, indexed and moved to a Cabinet Folder.

Tip:
You may import multiple documents with this method but you will need to limit the number of documents added. If too many documents are added at the same time you will receive the error "Access to the specified device, path or file is denied". The reason for this is that the operating system limits the command line used to add the documents to 254 characters please make sure the total characters in file names for the added document is equal to or less than 254.

To Copy and Paste documents from Windows Explorer
- From Windows Explorer highlight the file or files to be added to DocuXplorer
- Select the DocuXplorer Folder to copy to
- Right click the Folder icon or in the Folder Window to bring up a menu
- Select Paste from Explorer

- Choose an Index Set from the drop down list or use Folder default Index Set
- Enter index information into data fields
- Click Save and Close

Tip:

If multiple documents are added to a Folder using this method they are saved with the document's original file name in the Subject Field. Users will need to open the Viewer for each document to properly enter their index data.

Create a new document from a template

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer allows users to create a new document from template documents stored in the Library Templates Folder. These template documents are valuable when a form document needs to be filled in and saved in a client folder.

Create New Document from an existing Image Document

This Help topic refers to the following editions:
☑ Professional ☑ Enterprise

From the Image Document Window, DocuXplorer allows users to create new documents from existing documents.

With an image document a user can split an original document into multiple documents with each new document having a selected set of pages from the original document.

To create a new document from an Image document;

- In the Image Document Window select Thumbnails to view all pages scanned
- Select the pages to use in creating a document - hold down the shift key and click the pages to be used for the new document

Select the location to store to the document using "Place in Folder"

- Select an Index Set to associate with the new document
- Enter the index information

- From the File menu item click Create New

- Select the next group of pages in the Thumbnail View and repeat the process until all new documents are created

Tip:

- To save the original document with all its pages intact simply close the document without saving the changes.

NOTE: After clicking [Create New] to create the new document, the document showing in the Document View window will be associated with the new Index Set if it was changed and the new Folder if it was changed.

If [Save & Close] is clicked, the document in the Document View window will also be moved to the new location.

To save the document in the Document View window back to the original folder and Index Set, the Index Set and Folder MUST be changed back to their original values if they were changed then click [Save & Close].

Heads-up indexing

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Heads-up indexing refers to the ability of users to enter index data while viewing the image or preview of the added document. After completing scanning or importing a document the Document Window appears on your screen displaying the document and the folder's default Index Set fields side by side.
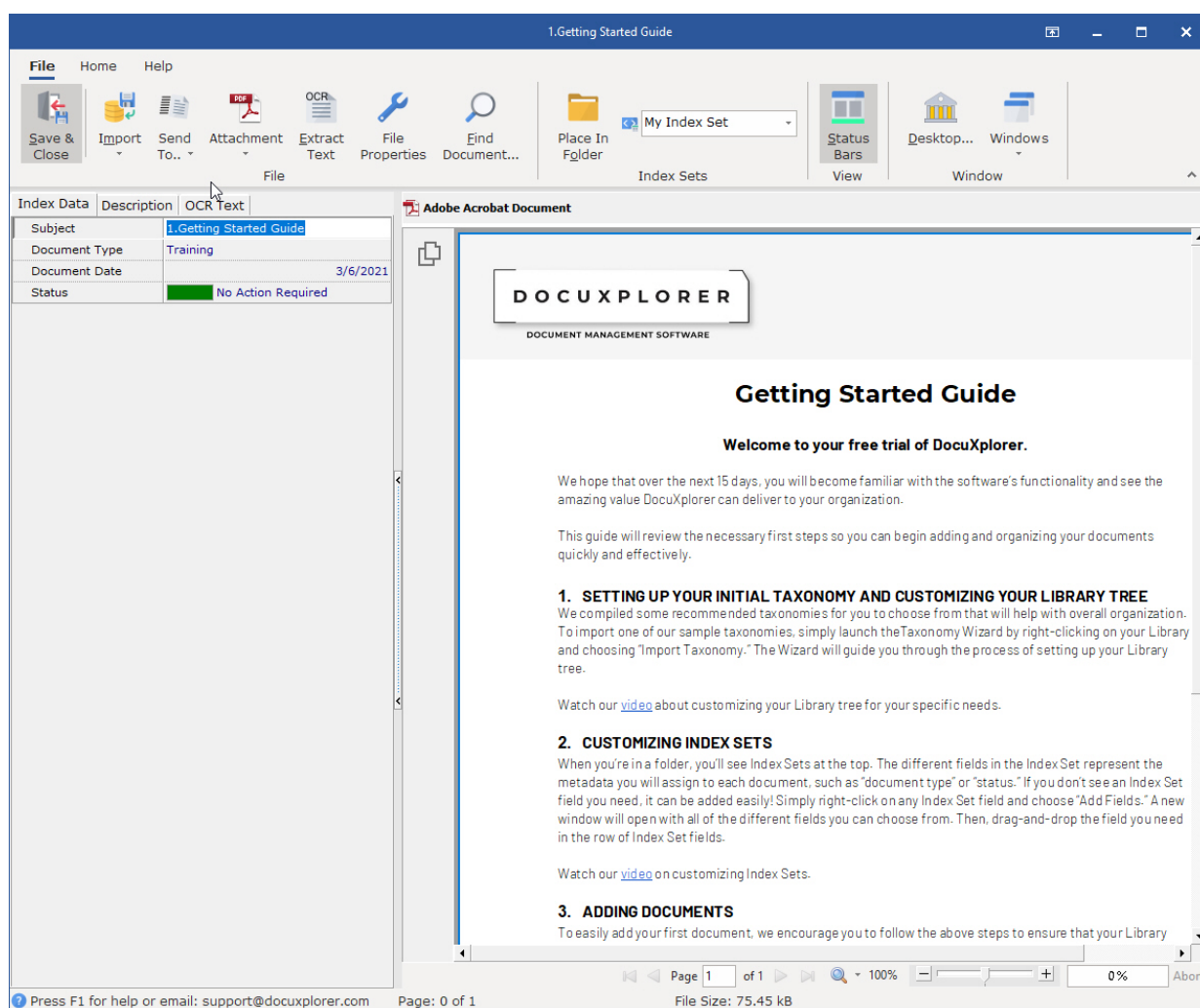
Import a Document

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

From the DocuXplorer Desktop:
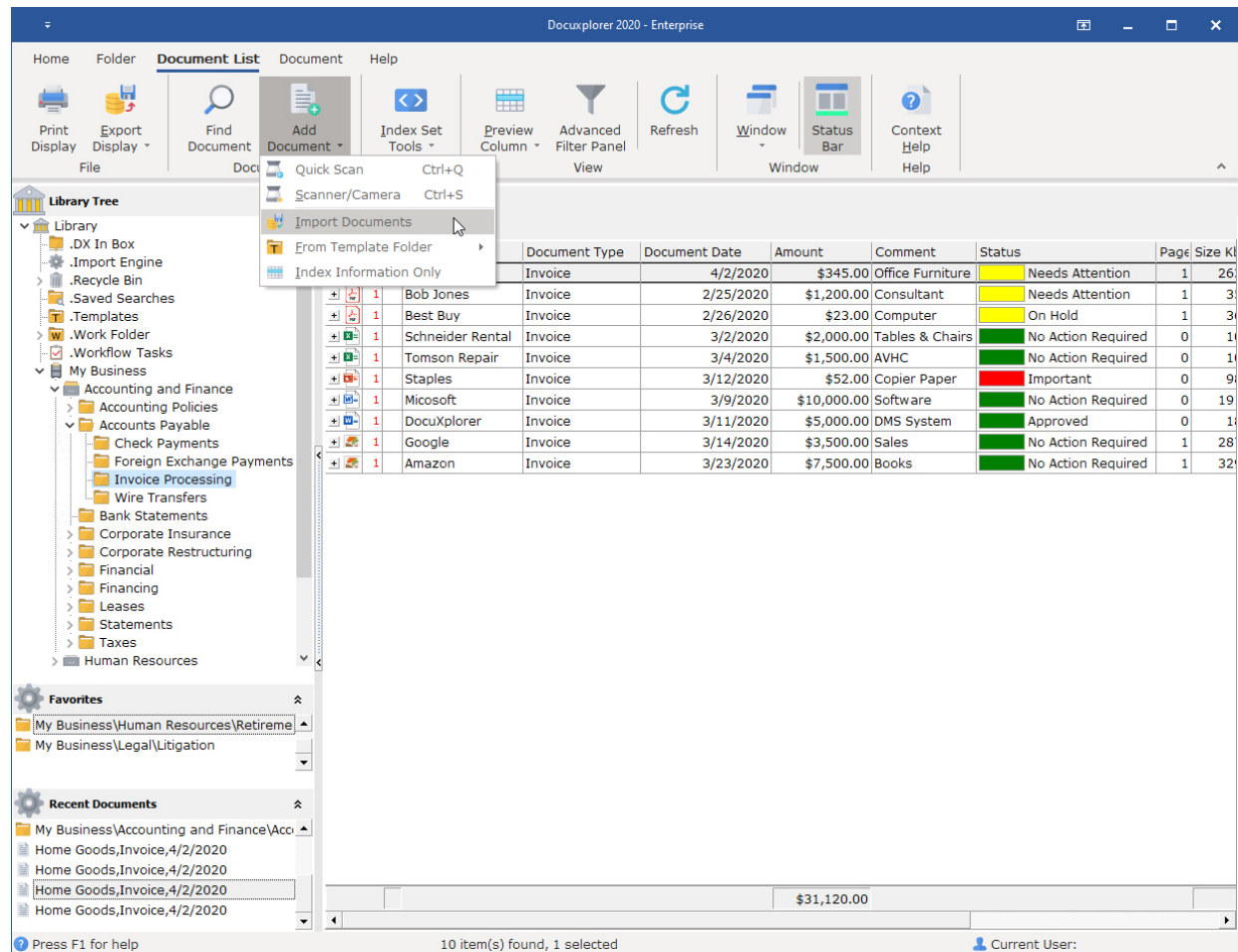
To Import a document:

- From the Menu bar, Icon Toolbar or right-click Menu click Add Document/Import
- Locate the document or file you wish to import and click Open
- Select an Index Set for the document from the drop down list and enter the index information
- To change to a different location click "Place in Folder" and select the Folder to store the document

Tip:

- You can import multiple documents by selecting a group of documents in the Locate Document screen.

- When importing multiple documents the documents will automatically be imported to the default location (the Folder where you initiated the import).

- DocuXplorer can automatically remove imported files from their originating hard drive folders after import by setting the "Send original files of documents imported to DocuXplorer to the Recycle Bin" Option in the [Tools/Options/Workstation](#) menu. When set, the duplicate document remaining on the hard drive is sent to the operating system's Recycling Bin after it has been added to the DocuXplorer database. This feature is available only when importing documents from a local hard drive.

- On a multiple document import the Subject field will be filled with the imported document's file name.

- You can change Index Sets and add additional index data by opening the Document Window for the document.

- When importing to a Folder with a Default Index Set only the Subject field data will be changed from the last entry. Use the Subject field data to determine what if any other data needs to be changed for each document.

- Use the [Sort](#) by Date Entered command to make locating those imported documents easier to find.

DocuXplorer PDF Print Driver

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The DocuXplorer PDF Print Driver provides you with near universal Windows Application Integration. Printing a document to DocuXplorer will convert the document into a PDF to be stored in the DocuXplorer Library. The DocuXplorer Print Driver can handle an unlimited number of pages, color or black and white, and will support Terminal Services and Citrix.

To capture a document print from any Windows program directly to DocuXplorer:

- From any Windows program choose the Print command (normally in the <File> menu)
- From the drop down list of printers choose DocuXplorer PDF
- Click Print
- DocuXplorer will convert the document into a PDF and automatically open DocuXplorer displaying the document in the Document Viewer
- In the Document Viewer choose an Index Set to associate with the document
- Using the Place in Folder function select a location in the DocuXplorer Library to store the document
- Click Save and Close

Tip:

- DocuXplorer does not have to be running to use the DocuXplorer PDF Print Driver.
- If you are using an email program other than Outlook or Outlook Express use the DocuXplorer PDF Print Driver to capture emails by converting them to images for storage in DocuXplorer.
- Hyperlinks to web pages often change, use the Print Driver to store the web page as an image and you will have a permanent record of it.

Index Information Only Documents

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Index Information Only Documents give you a method of adding records to the database without an image or electronic document attachment. This expands the functionality of DocuXplorer giving it the ability to act as a database as well as a document management system.

At times there may be documents you need to add to a Folder even though you have not received the paper document to scan in or the electronic file to import. Use the Index Information Only Document to add the information you need to accomplish your task and add the document attachment when it is available.

To add an attachment to an Index Information Only Document
- Select the Index Information Only Document
- Right click and select Document Properties
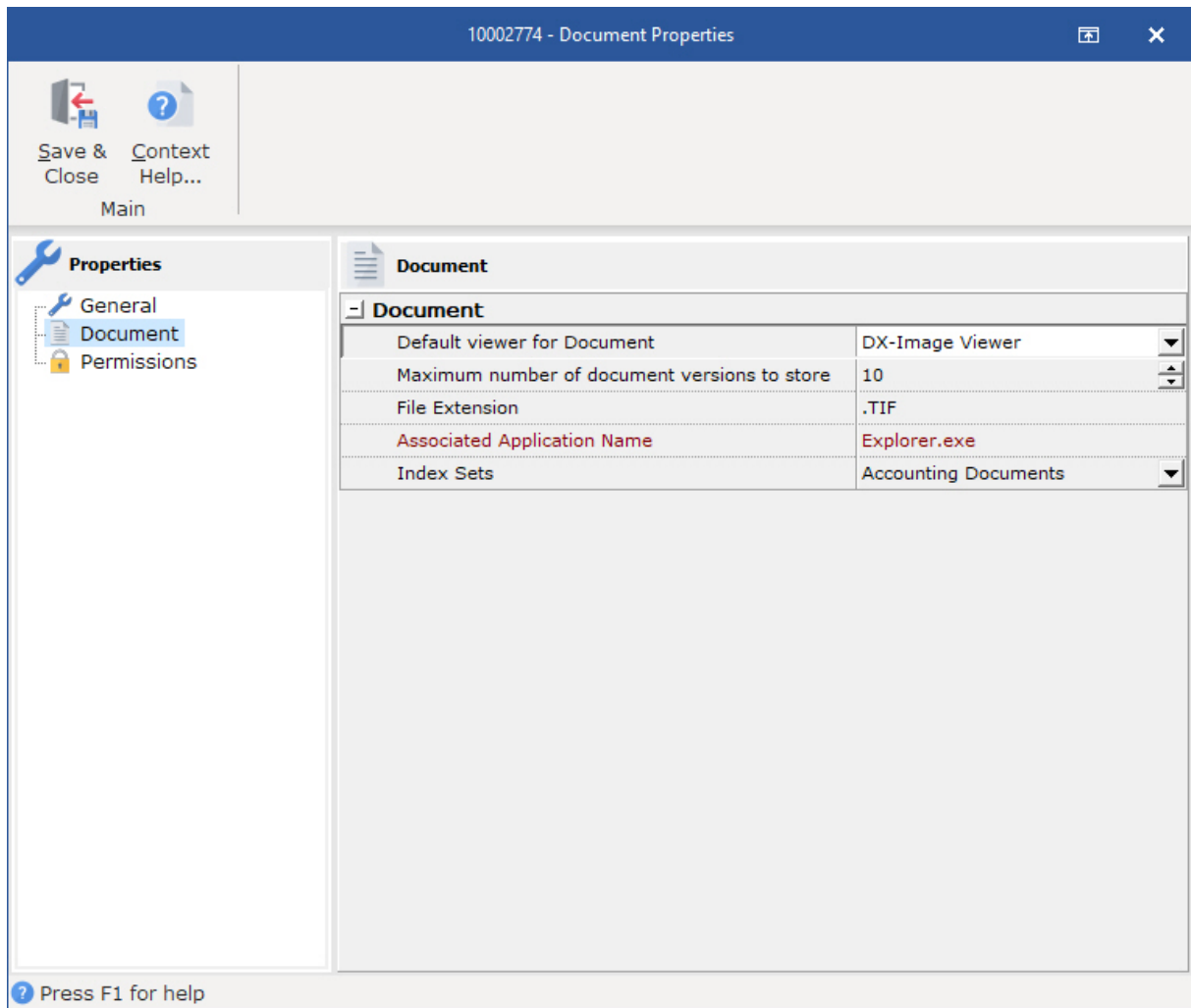
- From the Document Viewer Field select the type of document attachment you are adding
- Click OK
- Open the Index Information Only Document
- From the File menu select the correct method to add the document attachment, either Scan or Import
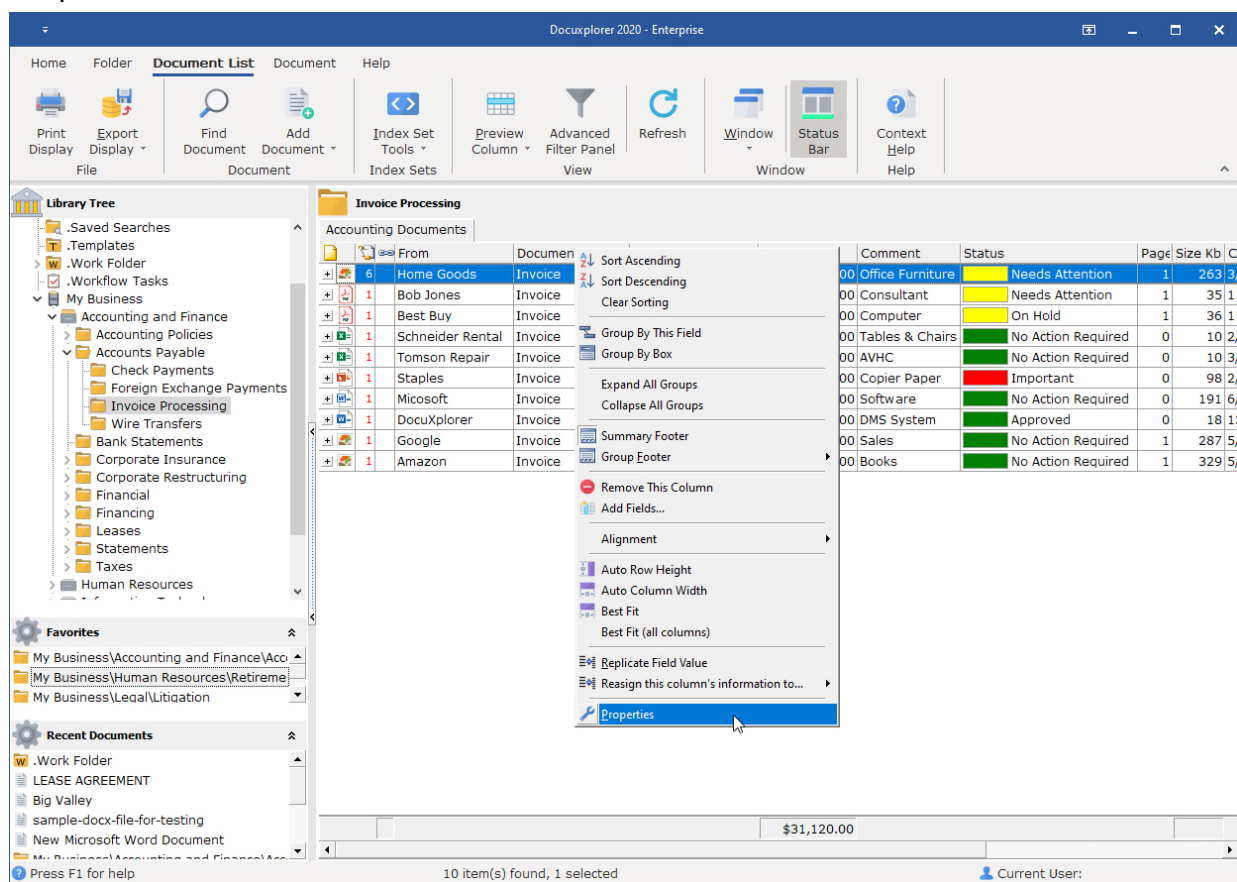- Complete the scan or import as if you were adding a new document

Working with Index Sets

About Index Sets

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

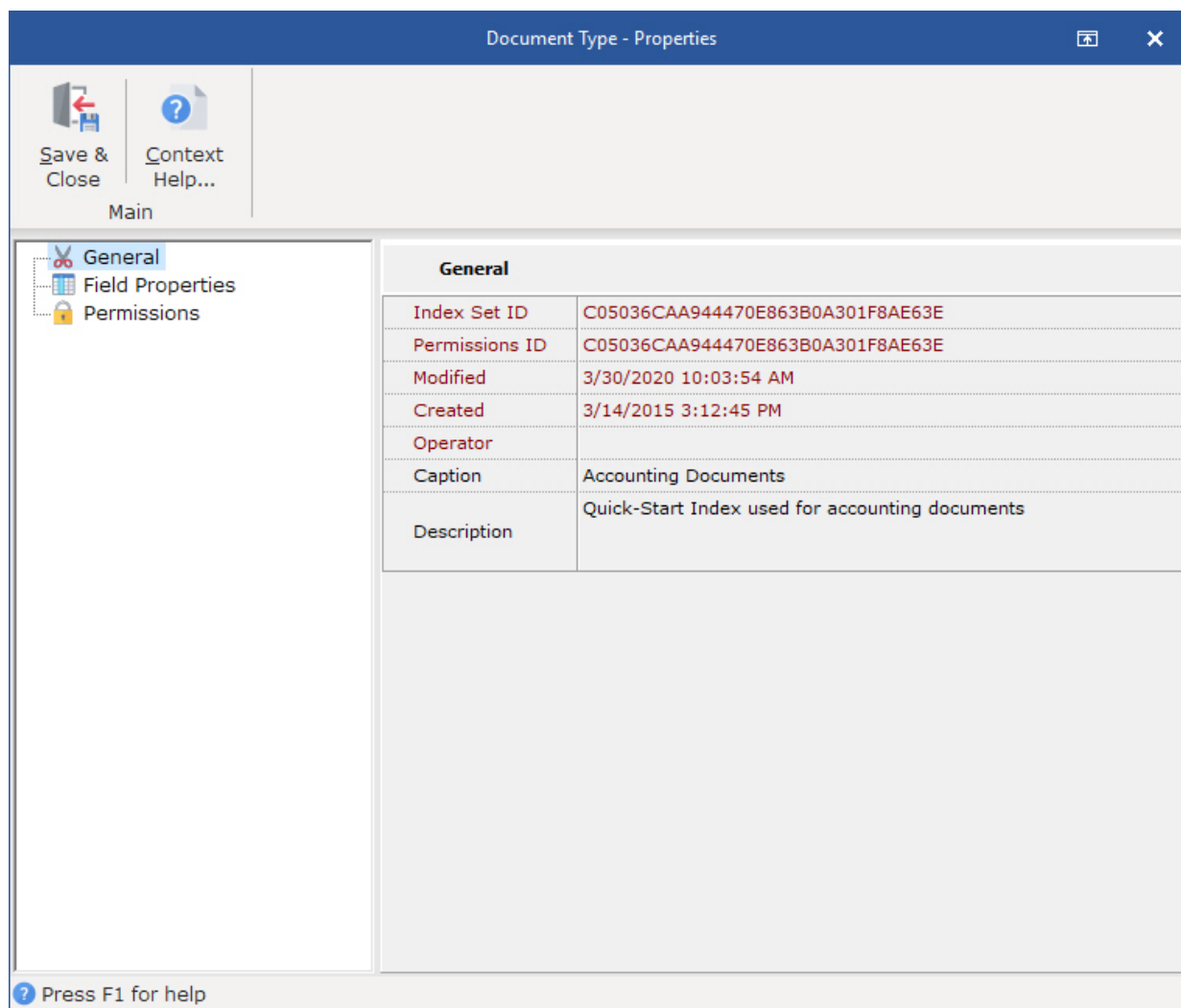An Index Set is a group of Index Fields both User Defined and DocuXplorer Default Fields used to profile a document with specific index data used in document searches.

Index Sets are a property of a document with a specific Index Set attached to each document. When adding documents you can choose to apply any Index Set as a document property from the drop-down box on the Document Window Toolbar.

Index Sets are objects of the Library and are available to every Cabinet. Changes made to an Index Set in any Cabinet will immediately be posted to the Library for synchronization. Any changes made to an Index Set in the Library will be synchronized in all Cabinets the next time the Cabinet is opened. All changes are global; all users will see all changes made to an Index Set.

An Index Set is created using the Create Index Set item found in the Index Set Tools drop down menu found on the Icon Toolbar.

When creating a new Index Set users can choose an existing Index Set as a template for a new Index Set. Using an existing Index Set as a template allows users to simply add or remove fields as needed for different document types that would have a similar nature (need similar fields as the elements of any searches for those documents).

Index Sets can be created with up to 35 user-definable index fields.

Index Sets can be created and modified using the Add Fields item found in the right-click drop down menu of the Column Header Bar in the Document List View.
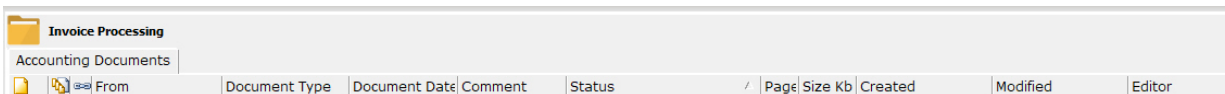
An index field can be one of five types; Standard Text, Checkbox, Hyperlink, Static Data Look-Up List, Static Data Checked Look-up List, or Dynamic Data Lookup List.

The order of display of index information in the Document Information Window on the DocuXplorer Desktop is dictated by the order of columns in the Folder Contents Window. You change the order of display by simply dragging and dropping the fields on the Column Header Bar.

DocuXplorer Enterprise and Professional users can create an unlimited number of Index Sets.

DocuXplorer Personal and Small Business users can create up to two user-defined Index Sets

All Documents Index Set

The All Documents Set is the default Index Set. When a folder is set to use All Documents as its display filter all documents will be grouped by their associated Index Set.

The All Documents Index Set cannot be modified and contains default fields which in best practice are used in most User-defined Index Sets. In a User-defined Index Set you can remove or change these default fields. The default fields are as follows.

Subject - Enter information to identify the document.

Document Type - Select from a pre-defined list of document types

Document Date - Enter the document's date.

Status - Used for workflow this allows a user to give the document a status and search on Status to provide that workflow. Select an entry from a pre-defined list.

Page - The number of pages in the document, if available.

Size KB - The size of the document in kilobytes.

Created - The date the document was created. This date is based on the document's creation date. If a document is imported and was created prior to the date it is added to the DocuXplorer Library the original date of creation will be displayed.

Modified - The date the document was last modified

Editor - The name of person who last modified the document.

Index Set Properties

Index Set Properties are located by selecting the Index Tools Menu and clicking Manage. Highlight the Index Set to be worked with and right-click to bring up a menu; then select Index Set Properties. Index Set Properties allows an administrator to rename an Index Set or change security permissions and add or delete Users and Groups for the Index Set. Users may also create an export file name based on data entered into index fields. Index Set Properties are synchronized across the Library. A change to an index Set will be replicated to every Cabinet associated with that Index Set.

The Index Set as a Document Property

Index Sets are attached to documents, as a property, so that the relevant index information and field names always flows with the document. When a document is moved from one folder to another it will take with it the Index Set Property that has been assigned to it. Users can change the Index Set Property assigned to a document from the Document Properties dialog box.

The Index Set as a Folder Property

Index Sets can be assigned to a folder as a default property. When a folder has an Index Set Default Property assigned, it will filter the display so that only documents with that Index Set assigned to them will display. When adding documents to a folder with an Index Set Property, the Document Window opened when first adding document will automatically display the default index set. The All Documents Index Set is defaulted to when creating new folders unless a different Index Set has been chosen as a default as a property of a Drawer or Cabinet. Users can change the Index Set Property assigned to a folder from the Folder Properties dialog box. Users can change the default Index Set as a property of a Cabinet or Drawer and replicate the setting to all child objects or newly created child objects.

Best Practice:

Set default Index Sets as a Cabinet or Drawer Property allowing all folders created in a Drawer or Cabinet to inherit the associated default Index Set.

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All Documents / My Index Set Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

The All Documents Index Set is the program's default Index Set. When a Folder is [filtered to display](#) the All Documents Index Set, the Folder Contents List will display all documents stored in that Folder automatically grouped by their associated Index Set. The All Documents Index Set cannot be modified and contains default fields which in best practice are used in most User-defined Index Sets. In a User-defined Index Set you can remove or change these default fields.

		Subject	/	Document Type	Document Date	Status		Page	Size K	Created	Modified	Editor
		.Recycle Bin										
		All Documents	My Index Set									
—	Index Set Name : All Documents											
+	1	Albala_2008_AmJClinNutr		Article	3/2/2020	No Action Requ		7	137	3/29/2013 4:20:54	3/26/2020 7:09:35	
+	1	Aune_Ann Oncol_2012_CRC_dairy		Article	9/2/2019	No Action Requ		9	450	3/21/2013 12:04:4	3/26/2020 7:09:45	
+	1	Avena_2008_NeurosciBiobehav		Correspondenc	5/13/2020	No Action Requ		20	636	3/25/2013 1:36:10	3/26/2020 7:09:50	
+	1	Bachman_2006_NutrRev		Correspondenc	5/7/2020	No Action Requ		23	129	3/25/2013 1:26:30	3/26/2020 7:09:57	
+	1	Baker_1980_JEpidemiolCommunityHealth		Correspondenc	5/7/2020	No Action Requ		4	559	3/21/2013 12:04:5	3/26/2020 7:10:02	
+	1	Ball_2002_IntJObes		Directions	8/5/2020	No Action Requ		9	105	3/26/2013 11:33:2	3/26/2020 7:10:07	
+	1	Bandini_1999_ObesRes		Financial	1/6/2020	No Action Requ		6	568	3/26/2013 5:31:28	3/26/2020 7:10:14	
+	1	Bantle_1992_DiabetesCare		Financial	12/3/2019	No Action Requ		9	1,172	3/21/2013 1:38:52	3/26/2020 7:10:18	
+	1	Bantle_1993_DiabetesCare		Legal	7/10/2020	No Action Requ		5	522	3/21/2013 1:41:12	3/26/2020 7:10:24	
+	1	Bantle_2000_AmJClinNutr		Notice	3/16/2020	No Action Requ		7	122	3/27/2013 1:17:36	3/26/2020 7:10:27	
—	Index Set Name : My Index Set											
+	1	New Microsoft Word Document			3/27/2020	No Action Requ		0	18	12/31/2015 5:31:5	3/27/2020 3:30:22	

The default fields are as follows:

Subject - Enter information to identify the document.

Document Type - Select from a pre-defined list of document types

Document Date - Enter the document's date.

Status - This field allows a user to give the document a status. Searching on Document Status is the beginning of a workflow. Select an entry from a pre-defined list.

Tip:

This Color Coded Status Field can not be used in a [Full Text Search](#). To include the Color Coded Status Field in a search use the [Search by Field](#) option of the Find Dialog.

Page - The number of pages in the document. This field will only be populated for TIFF and PDF documents.

Size KB - The size of the document in kilobytes.

Created - The date the document was created. This date is based on the document's creation date. If a document is imported and was created prior to

the date it is added to the DocuXplorer Library the original date of creation will be displayed.

Modified - The date the document was last modified

Editor - The name of person who last modified the document.

Tip:

The index information data displayed will be the data entered into the index fields associated with that document. For this reason it is best to leave the default Subject field at the front of all index sets and enter information that is descriptive of the document to be able to easily recognize documents with either its associated Index Set or the universal All Documents Index Set.

My Index Set

The "My Index Set" provided the basics index set columns that can be used for many different document types. Unlike the All Documents Index Set, the "My Index Set" additional columns can not be added but permission and field properties can.

Create a new Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

DocuXplorer Enterprise and Professional users can create an unlimited number of Index Sets.

DocuXplorer Personal user can create up to 2 additional User-Defined Index Sets.

To add a new Index Set:
- Click on Index Set Tools button of the Icon Toolbar and select Create from a Template
- Select a previous Index Set to use as a template from the drop-down list or use the default All Documents Index Set
- Type the name for your new Index Set
- Click OK
- Modify your new Index Set by using the drop-down menu from the Column Header Bar to Add Fields and set Index Field Properties .

Tip:
- By default an Index Set's properties: users, groups and permissions are set to your Library security default. When creating an Index Set administrators can modify as needed permissions for the new Index Set.
- New Index Sets are posted across a Library. Modification to an Index Set after creation is accomplished using the Column Header Bar of the Document List View.
- The Subject Field in an Index Set can be modified but not deleted.
- The Subject Field is the one field from any Index Set that will always be visible when a Folder Contents List is set to display "All Documents" - it should always be filled with data relevant to identifying that document.
- Users can not create two fields with the same name in an Index Set

See also:

Modify an Index Set

Modify an Index Set - Add, Remove or Modify a Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Modify an [Index Set](#) from the [Column Header Bar](#) of the [Document List View](#). right-click the Column Header Bar to display a menu to Add or Remove Fields and change [Properties](#).

To Add a Field to an Index Set:

Select the Add Fields item from the right-click menu on the Column Header Bar to bring up a dialog box with a list of all the fields available to add to the Index Set.

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Add Fields	x

Columns

Currency Field-01
Currency Field-02
Currency Field-03
Currency Field-04
Currency Field-05
Date Field-02
Date Field-03
Date Field-04
Date Field-05
Integer Field-02
Integer Field-03
Integer Field-04
Integer Field-05
Memo Field-01
Memo Field-02
Memo Field-03
Memo Field-04
Text Field-01
Text Field-03
Text Field-04
Text Field-05
Text Field-06
Text Field-07
Text Field-08
Text Field-09
Text Field-10
Text Field-11
Text Field-12
Text Field-13
Text Field-14
Text Field-15
Accessed
Checked out by
Date Checked Out
Document ID
Document Viewer
Export File Name
Index Set Name
Maximum Versions
Reason Checked Out

The fields in the list consist of user-definable fields (Currency, Date, Integer, Text String, and Memo) and system default fields that cannot be changed. Drag and drop the field to add directly to the Column Header Bar. Move the field to its display location by dragging it into place on the Column Header Bar. right-click the newly added field and click Properties to change the field's properties.

The system default fields include;

>Accessed - the date and time the document was last accessed

>Checked Out By - the user who has checked out the document

>Date Checked Out - the date and time the document was checked out

>Document Viewer - displays the document viewer associated with the document

>Export File Name - displays the user-defined file name that will used when the document is exported from DocuXplorer or attached to an e-mail.

>Index Set Name - displays the name of Index Set associated with the document

>Maximum Version - displays the maximum number of versions that can be created for the document

>Reason Checked Out - displays the memo note added when a document is checked out

>Size Bytes - displays the size of a document in kilobytes

Tip:

Users might find that adding a system field such as Accessed, with the date the document was last accessed may be valuable in sorting and searching for documents in a folder. For instance, if you were looking for all the documents in a folder that were accessed today you could sort the Document List View by the Accessed field to easily find those documents.

To Remove a Field from an Index Set:

Drag and drop the field off the Column Header Bar. The field is then replaced on the Add Fields dialog with its new display title and available for use and modification again.

To Modify the Properties of a Field:

right-click the field in the Column Header Bar of the Document List View and select [Properties](#) from the menu.

Tip:

- By default an Index Set's properties: users, groups and permissions are inherited from the object where it is created.
- The Subject Field in an Index Set can be modified but not deleted
- The Subject Field of any Index Set will always be visible when a [Folder Contents List Filter](#) is set to display "All Documents" in the Folder it should always be filled with data relevant to identifying that document

Index Set Fields

Index Fields

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Index fields are used to store relevant information along with a document. The data input to an Index Field is used to find those documents when needed. The program provides 35 user-definable Index Fields in an Index Set. Auto-Indexing Variables can be used to populate fields with data based on a number of default variables such as Cabinet, Drawer or Folder Name, Date, Document Path, an incrementing number and more.

An index field can be one of the five following types:

Currency Fields – automatically displays the data entered as a currency. Currency type will be determined by the setting in your operating system or changes made through the field display mask.

Date Fields – automatically displays data entered in date format. click the arrow at the end of the field to display a Calendar Window to choose a date.

Memo Fields - display data in a memo text box.

Integer Fields – automatically displays data as a whole number.

Text Fields – displays data as an alpha-numeric text string

Default Fields - displays data created by DocuXplorer in the administration of a document

Index Field Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Index Field Properties display information about the field and on user-defined fields allows you to modify the field to fit your needs. These modifications to field properties provide a user with the ability to quickly and accurately enter index data with minimal effort. Administrators can also set field properties to require data entry for a field to assure the document will always be properly indexed.

Set up user-defined Index Field Properties from the Field Properties dialog box. Access Field Properties by right clicking on the field to be modified to bring up the drop-down menu of the Column Header Bar.

General

The General Properties fields contain information about the Field. Only the Description Field is editable and can be used for memo information.

Field Properties

To set up Index Field Properties:
- Type in the fields display name
- Type in a Field Rollover Hint. Field Rollover Hints are used to give information about a field and are presented under or near the field's header as you move the cursor over the header. The hint will appear for a short period of time. Rollover Hints can as a default be turned on or off in <Tools><Options><Workstation>.
- Set the alignment with the drop down list
- Set Display Width (in pixels)
- Set Display Mask (for Integer and Currency fields only) - choose from the drop down list of existing masks or create custom display masks
- Check the Required box if data entry is required before document can be saved to the Library

Tip:

If you have selected Required for a field an icon will automatically display with the field display name to let a user know that data entry for that field is required and cannot be saved to the Folder unless entries are made.

- Set Minimum Value (for Integer and Currency Fields only)
- Set Maximum Value (for Integer and Currency Fields only)
- Set Precision (the number of digits allowed to the left of the decimal point for Currency Fields only)
- Select a default for using the last data entered when adding new documents
- Check Required box if data entry is required before the document can be saved to the Library

Tip:

Using last data entered when adding documents will automatically populate the field with the last data entered for a document with the same Index Set. This default is useful when you are adding multiple documents from a source and you desire to have much of data in the index fields repeat itself each time a document is added.

Use this value when adding a new document

This option is used in conjunction with "Use this value when adding a new document"

When checked this option remember the last entered value and is maintain in the "Use this value when adding a new document" field described below. If a user defined variable is placed in the "Use this value when adding a new document" field below, the last entered value is maintained in the folder properties where the variable was defined. As a result each folder could maintain its own default values.

If more than one person is adding documents to the same folder, the last user to post their change will be the last entered default value to be stored.

Use this value when adding a new document

This function allows users to create an index field entry that will appear each time a document is added. Data entered this way is specific to an Index Set. Users can also enter an Auto-Indexing Variable to capture data associated with the variable chosen. Variables that can be used include Cabinet, Drawer or Folder Name, Today's Date, an incrementing serial number, and more.

Read-Only - selecting this default would prevent users from editing the value automatically added to the new document

Edit Control Type

- Choose an Edit Control from the drop down list. Field Controls Types include;
  - **Standard Text** - a field with data that would not be consistently reused
  - **Check Box** - to set up a True/False statement (i.e. a field labeled Approved with a check box would serve to indicate the document's status)
  - **Hyperlink** - The editor control type hyperlink can contain URLs ex. http://www.website.com, File links ex: file://c:\My Documents\document.xxx and email links ex mailto://Myfriend@emailaddress.com

- Static Data Lookup List - an auto-complete field with a drop down list that will consistently use a predefined data set
- Static Data Checked Lookup List - a list with check boxes to select a group of entries from a list of predefined data to a field
- Dynamic Data Lookup List - an auto-complete field with a drop down list that use a predefined set of data as well as automatically add new data to the data list. (i.e. a Vendor field where existing vendors are reused and new vendors are added as needed)
- Date - in a Date Field will display a date
- Date and Time - in a Date Field will display both Date and Time.
- Choose or create a user-defined edit mask
- If Look-Up List was chosen, populate the list by typing the specific information to display as a single line in the Look-Up Field Drop-Down List
- Check Required box if data entry is required before the document can be saved to the Library

Tip:

- After the properties have been set for an Index Set field and data has been entered, changes to the properties of that field can result in unexpected or incorrect data display. A user must consider the existing data and how it will translate to a different Edit Control.
  - For example; if you change the Edit Control Type for a Text field from "Standard Text" to a "Check Box", the "Check Box" Edit Control displays as True or False in the form of a checked or unchecked box rather than text, none of the previously entered text would then display and any changes made to the field by checking the box would change the underlying column entry.
- If you change a field's Edit Control Type property to either a Static or Dynamic Edit Control, the current values in the field will NOT be added to the Static/Dynamic Lookup List automatically. You will have to do this manually.

Date Field Specific Properties

With Date Fields in DocuXplorer you can set a field to display both date and time or date only and set a specific method for grouping documents in a Folder or Query List.

To set the Date Field display for either Date only or Date and Time select the item from the Edit Control Type drop-down list.

To set a grouping methodology for a Date Field select an item from the drop down list.

Field Permissions - security is only available in DocuXplorer Enterprise and Professional

To set up Index Field security right-click the Index Field to work with and select Field Properties/Permissions.

Permissions allow you to add users and groups and set security properties for users and groups for the Index Field

- See the Security/Users/Groups help item for more information on how to add users and groups to an Index Field.

- See Security/Index Set and Field Permissions for more information about setting Index Field permissions.

Auto Indexing Variables

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Auto-Indexing Variables are used to automatically populate index fields and Find Document requests with data based on one of the following variables.

- {Today} - Current Date and Time
- {Date} - Current Date
- {Time} - Current Time
- {ComputerName} - The computer's name as defined in Operating System under System Properties
- {NetworkUserName} - The Windows or Network User name
- {LoginName} - User name used when login in to Docuxplorer.
- {FolderPath} - The full path name where the document is created
- {CabinetName} - The name of the Cabinet where the document is created
- {DrawerName} - The name of the drawer where the document is created
- {FolderName} - The name of the folder where the document is created
- { ParentFolderName} - To be used when a document is added to a subfolder. The field will be populated with the name of the parent object. When adding a document to a folder whose parent object is a Drawer, the Drawer name will be used to populate the field.
- {+#+} # - represents a numeric value between -2147483648 and 2147483647 which would be incremented by 1 each time a new document is added. No spaces should be placed between {+ and +}. Correct example {+101+} would produce 102 as it's next value. This could be used as a serial number or Bates number stamped on a document. Incrementing numbers are associated with an Index Set. The number will increment on any documents added to the Library that are associated with that Index Set.
- {Date,MM, DD, YY} - this auto-indexing variable is used to create an automatically incrementing date field. Leap years will automatically be determined and properly handled. This variable can be used for either a date or text field. The variables that can be modified are:
  - DATE, TODAY = the current systems date, you can also enter any valid date e.x. 12/2/2020
  - MM = the numbers of months to add or subtract from the current date

- DD = the numbers of days to add or subtract from the current date
- YY = the numbers of years to add or subtract from the current date

  For example, for a field that will automatically populate with a purge date that is seven year from the date of entry, the statement would like this {Date+0,0,7} = today's date plus 7 years. A purge date query could then be initiated to display documents to be purged in a date range.
- { GUI-UniqueID} is a globally unique identifier, automatically generated by the system. It is useful for identifying documents.
- {FileName} The name of the imported file with out the file extension
- {FileType} The imported file's extension
- {FilePath} The imported file's path

DocuXplorer has the ability to read the extended file attributes of different file types. This information can then be used to auto populate index fields. Each applications support a different number of these extended file attributes so its not possible to list every attribute here. However, if you import a document and view it via "Open Document Viewer" and select File | Properties you will see a list of extended file attributes that have been assigned a value for the selected document. Below are a few of the basic attributes that most application populate and control. See the help information from these application on how to control these attributes further.

- {Title} - will fill field with data found in the Title field
- Author} - will fill field with data found in the Author field
- {Subject} - will fill field with data found in the Subject field
- {Keywords} - will fill field with data found in the Keywords field
- {Comments} - will fill field with data found in the comments field

Outlook Document Auto-Indexing Variable - the following auto-indexing variables are specific to saving emails and tasks from Outlook and can significantly reduce the amount of indexing required for an email document with any Index Set. These auto-indexing variable will extract the To, From, and Subject data of an email to populate DocuXplorer fields.

- { EmailTo} - will fill a field with the To email address associated with an Outlook email message
- { EmailFrom} - will fill a field with the From email address associated with an Outlook email message
- { EmailSubject} - will fill a field with the Subject data associated with an Outlook email message
- {EmailSentOn} - will fill the field with the Sent Date of an Outlook email message

- {EmailReceivedTime} - will fill a field with the time the Outlook email message was received
- {EmailAttachmentCount} - will fill a field with a integer indicating the number of attachments associated with the email
- { TaskSubject} - will fill a field withe Subject data associated to an Outlook Task
- { TaskPercentComplete} - will fill a field with the percent completed as displayed on the Outlook Task Screen
- { TaskDueDate} - will fill a field with the Task Due Date as displayed on the Outlook Task Screen
- { TaskStartDate} - will fill a field with the Task Start Date as displayed on the Outlook Task Screen
- { TaskDateCompleted} - will fill a field with the date the Outlook Task status has been Completed

Enable extended file properties for Auto Index values

When enabled via [Tools | Options | Workstation | Import Document Settings](#)

To automatically fill a field with data using an Auto-Index Variable;
- Right click the Field on the Column Header Bar
- Select Field Properties from the drop down list
- Click on the item - "Use this value when adding a document"
- Enter the variable and click OK in the text field
- Click Ok and close the Field Properties dialog box

Tip:

To use Variables when adding a new document, the Folder the document is being added to, must be defaulted to the Index Set containing the Variable. The defaulted Index Set must have a field which has its "Use this value when adding a document" property set to automatically enter one of the listed Variables.

These variables are a powerful feature of DocuXplorer and allow you to significantly reduce the time it takes to index a document.

Some examples of the use of Variables in an Index Set are:
- [A business that stores documents based on a client, project or patient name](#)
- [A business that stores documents based on multiple indexes such as client, location, and project](#)

[A business that stores documents based on a client, project or patient](#) name

In a situation where your business deals with the documents based on client or patient name you would create a Cabinet called Clients with Drawers based on an alpha grouping such as A to D. In the following example for a Law, Accounting, Financial Services Firm or Health Care Facility, Folders would be based on a client name such as Abacus Shutters, Abrams Financial Management, etc.
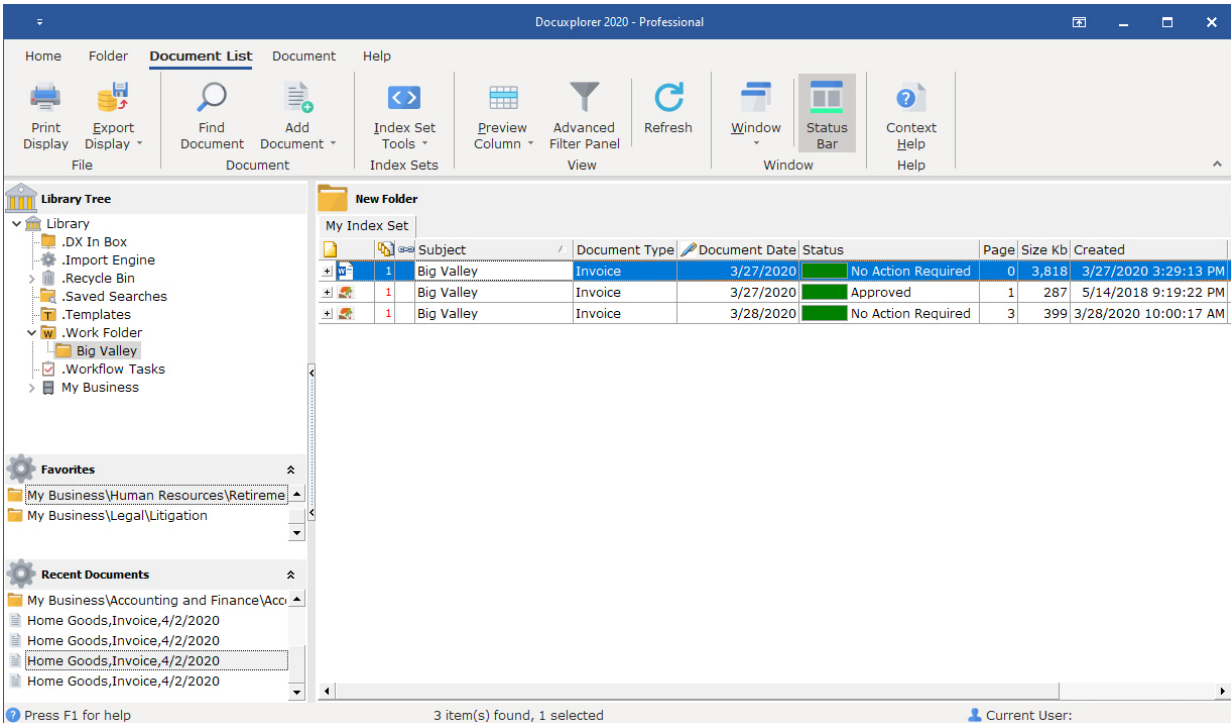
The screen above used the {FolderName} variable to automatically populate the Client field with the client name based on the Folder

To automatically fill the Client field with the FolderName;
- Right click the Client Field on the Column Header Bar
- Select Field Properties from the drop down list
- Select the item - Use this value when adding a document
- Enter the variable {FolderName}
- Click Ok and close the Field Properties dialog box

[A business that stores documents based on multiple indexes such as client, location, and project](#)

The following example is a Real Estate Management company that deals with multiple properties in multiple locations.

- In the Library a Cabinet is created for management documents
- A Drawer is created for each city in which the client has properties
- A Folder is created for each property in a City location Drawer
- An Index Set is created with Fields for City, and Property each containing variables to auto-index fields associated with a document.
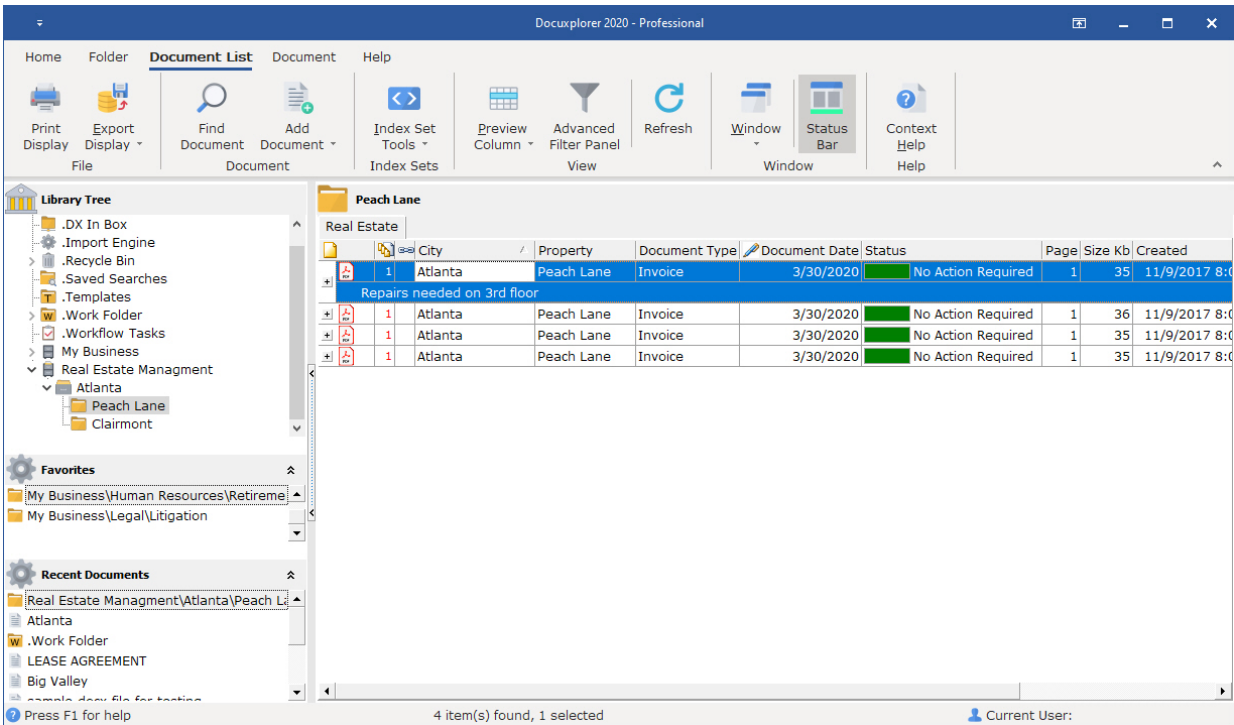
In this example the RE Management firm can add documents to the property folder with some fields being automatically indexed and have other fields that are populated with index data specific to the document, in this case the Subject and Doc. Type field.

Notice also that the Document Text Field is being used to provide memo notes on a document that are easily viewable by any user with access to this folder.

Default Fields

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Default fields contain data created by DocuXplorer in the administration of a document. These fields can be added to an Index Set and displayed in the Document List View. When displayed in the Document List View the default data is searchable.

Open the Add Fields dialog box to add default fields to an Index Set by dragging and dropping the field to the Column Header Bar.

Default fields created with a document are:

- Accessed - the date the document was last accessed by any user
- Checked Out By - the user has checked out the associated document
- Created - displays the date the document was created
- Date Checked Out - the date the document was last checked out
- Description - Memo text field - can be edited by users to associate full text searchable text with a document
- Document Viewer - displays the document viewer associated with the document
- File Type - displays an icon indicating the file's native program
- FTS Index Data - displays Full Text Search index data used in full text searches
- Index Set Name - displays the name of the Index Set associated with the document
- Maximum Versions - displays the number of versions set to be saved for the associated document - this field can be edited to allow additional versions to be saved
- Modified - display the date the document was last modified
- Page - the number of pages in either a TIFF or PDF document. The field is editable so that a user can enter the number of pages for a Word, Excel or other type of electronic document that does not offer page count information on import.
- Reason Checked Out - displays the memo text entered by a user when checking out a document
- Size Bytes - displays the size of a document in bytes

Size KB - displays the size of the document in kilobytes

Subject - a user-defined description of the document or the original file name or date and time of document scan

Version Count - the number of versions associated with the document

Tip:

Adding the Checked Out By default field to any Index Set is a simple way to see in the Document List View the documents that are checked out and who has checked those documents out.

Dynamic Data Lookup List Editor

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ **Small Business**

The Dynamic Data Lookup List Field is used to create a drop-down look-up list from which users can choose the appropriate entry. The look-up list created on-the-fly as new documents are added to DocuXplorer, this reduces the need to have an administrator maintain the list as is needed with a Static Data List. The Dynamic Data List speeds data entry and improves accuracy on document searches. Start typing and DocuXplorer will attempt to auto-complete the entry from the data list.

To create a Dynamic Data Lookup List Field:

Add a new Index Set or modify an existing one

Right click the Column Header Bar

Open the menu item Add Fields

Add a Text Field by dragging it from the Add Fields dialog box or select an existing one

Right click the field on the Column Header Bar and select Field Properties

Select the Edit Control Property item Dynamic Data Lookup List

Enter all remaining field properties

Click Save and Close

You can correct an entry that has been misspelled in a Dynamic Data List from the Field's Field Properties dialog box.

The maximum number of entries allowed for a Dynamic Data Lookup List is 10,000. When entries exceed 10,000 entries, the least used value is dropped from the list.

In action, the list would work like this:

Static Data Lookup List Editor

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The **Static Data Lookup List Field** is used to create a static list of information from which users can choose the appropriate entry. The static data list speeds data entry and improves accuracy on document searches. Start typing and DocuXplorer will attempt to auto-complete the entry from the static data list.

To create a **Static Data Lookup List Field**:
- Add a new Index Set or modify an existing one
- Right click the [Column Header Bar](#)
- Open the menu item Add Fields
- Add a Text Field by dragging it from the Add Fields dialog box or select an existing one
- Right click the field on the Column Header Bar and select Field Properties
- Select the Edit Control Property item Static Data Lookup List
- Click on the item Lookup List
- Enter the data to be displayed in the Lookup List
- Click OK in the Lookup List Text Box
- Click Save and Close to save your changes or click X at the upper right to cancel changes.
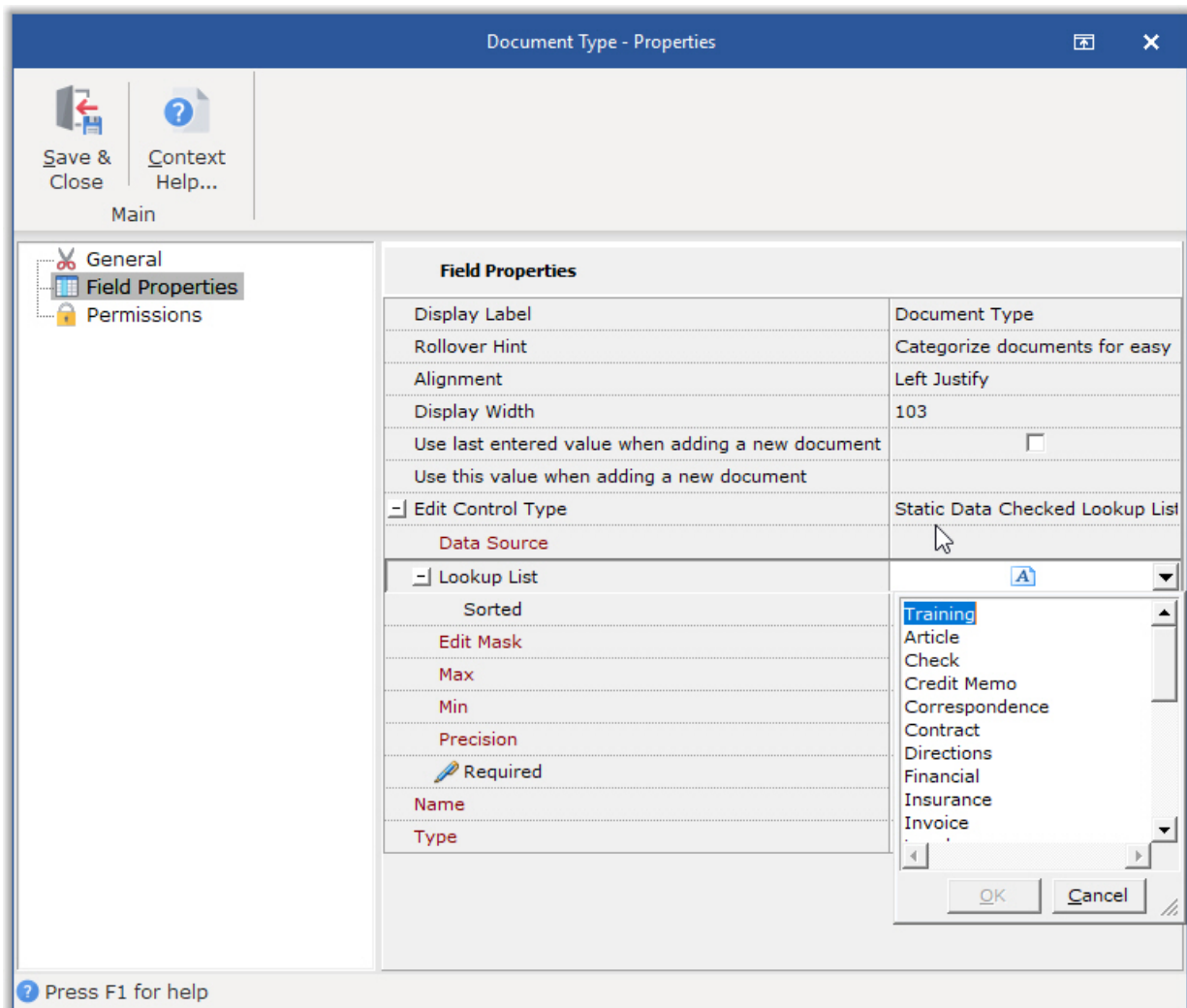
Tip:

Sorted in a Static Data Lookup List field is not applicable

The maximum number of entries allowed for a Static Data Lookup List is 10,000.

In action, the Static data Lookup List field looks much like the Dynamic Data Lookup List field:

Check Box Editor

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The check box field is a variation of the Text Field with indexes based on a character string. The string in a Check Box field can be either unassigned, checked (true), or unchecked (false).

- 1st state - Unassigned.
    - Unassigned check box fields can be searched and are valuable in a workflow. The Unassigned state adds a third state that can be defined by the check box. An unassigned check box field can indicate no action has been taken on a document.
- 2nd state - Checked.
    - When a box is checked it can indicate a second state or a true statement.
- 3rd state - Unchecked.
    - When a box is unchecked it could indicate third state or a false statement.

By default a Check Box field is grayed, this indicates the field is unassigned.

As an example: a payable document that has been entered but not reviewed would be left gray when checked it would indicate it was reviewed and ready for payment. A user would then pay the invoice and uncheck the box to indicate the workflow was completed. In a query a user can easily bring up all documents associated with a particular state.

Date Fields

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Date Fields are masked to display data entered as a date or with both date and time. The default entry for a Date Field is today's date. You can enter a different date using the keyboard or the drop down calendar. If you set the field properties to Date and Time the drop down Calendar will display an editor to enter both date and time.

Tip:

If you have set the date field property to display both date and time and only a date and no time have been selected the time will default to 12:00 am.

If the Date Field Property has been set to Date the arrow button on the right brings up a calendar to choose a date.

If the Date Field Property has been set to Date and Time the arrow button will display a calendar and clock to select both date and time.

Date formats are based on settings you have selected in the operating system.

Automatic Purge Date fields can be set up using the Incrementing Date Auto-Indexing Variable. A purge date query could then initiated to display documents to be purged in a date range.

When used to group documents in a Folder, Date Fields have special properties See here for more information about Grouping documents by a Date Field.

Display Mask in a Date Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Change the display format of a date field from the Date Field Properties dialog box found by right clicking on a date field on the Column Header Bar and selecting Field Properties.

You can use the Display Mask to custom specify a formatting string that is used to format the value in a date-time field when the field's value appears as a string. If Display Format is not assigned a string, the value is formatted according to the default specified by the Windows Control Panel.

Construct a Display Format string in the Date Field Properties dialog box using these format specifiers:

Element Description

d   The one- or two-digit day.

dd   The two-digit day. Single-digit day values are preceded by a zero.

ddd   The three-character weekday abbreviation.

dddd   The full weekday name.

h   The one- or two-digit hour in 12-hour format.

hh   The two-digit hour in 12-hour format. Single-digit values are preceded by a zero.

H   The one- or two-digit hour in 24-hour format.

HH   The two-digit hour in 24-hour format. Single-digit values are preceded by a zero.

m   The one- or two-digit minute.

mm   The two-digit minute. Single-digit values are preceded by a zero.

M   The one- or two-digit month number.

MM   The two-digit month number. Single-digit values are preceded by a zero.

MMM   The three-character month abbreviation.

MMMM   The full month name.

t   The one-letter AM/PM abbreviation (that is, AM is displayed as "A").

tt   The two-letter AM/PM abbreviation (that is, AM is displayed as "AM").

yy   The last two digits of the year (that is, 2001 would be displayed as "01").

yyyy   The full year (that is, 2001 would be displayed as "2001").

To include literal strings in the format, enclose them in single quotes. Failing to quote literal strings can have unpredictable results, even if they do not include formatting codes. Use two single quotes to represent one single quote character in a literal string. For example,

'Today''s date:' MMM dd, yyyy

formatted for the first day of April, 2001, would display "Today's date: Apr 01, 2001".

Integer Fields

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Integer Fields display whole numbers. Input can only be numbers. Numbers can be positive or negative not greater then 2,147,483,648 or less then – 2,147,483,647.
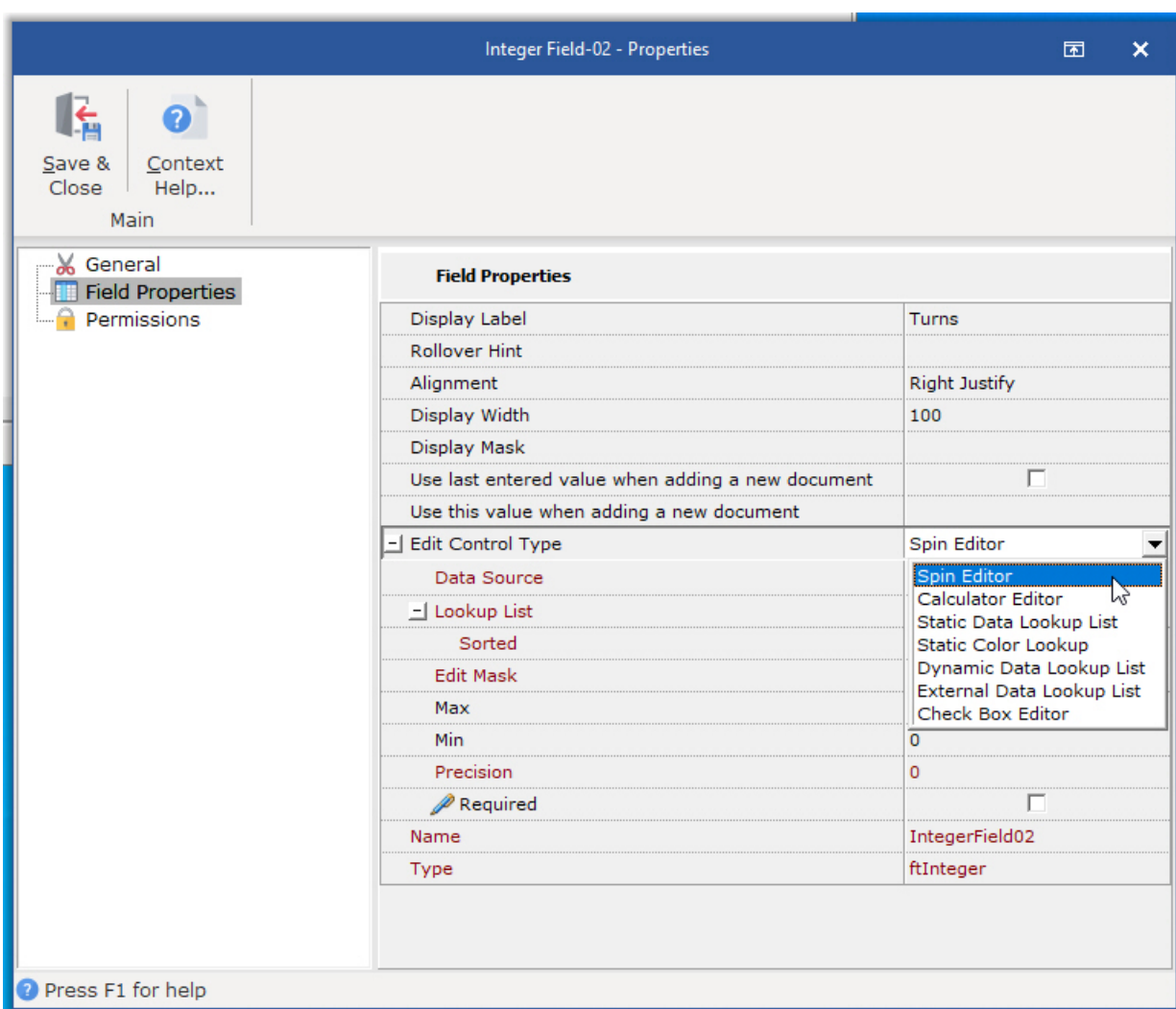
The Integer Field can have one of the following edit control types:

Spin Editor - use the Spin Control consisting of an up and down arrow on the right of the field to increase or decrease a value.

Calculator Editor - allows user to calculate a number to enter into the field

Static Data Lookup List - users choose from a preset defined set of numbers

Static Color Lookup - allows a user to choose a defined set of colors and associated text. This is useful in creating color-coded document status fields as part of a workflow.

Dynamic Data Lookup List - users choose from or add a list of numbers.

Check Box - allows an Integer Field to be used as a Check Box field freeing up a Text Field for other uses.

Min - Allows a user to set the minimum value allowed to be entered in the field

Max - Allows a user to set the maximum value allowed to be entered in the field

Precision - Allows a user to determine the precision of a number - (the number of digits after the decimal point are required in this field). If no precision is set the field will default to a whole number

Display Format in a Integer Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Display Formats for an Integer Field determines the field's display format. Use the Display Format property to override automatic formatting of a Integer field display. Users can change a field display format in the Field Properties dialog box of the Index Set Manager.

Users can construct a Display Format string in the Field Properties dialog box of the Index Set Manager using these format specifiers:

Specifier Representations

0 Digit placeholder. If the value being formatted has a digit in the position where the "0" appears in the format string, then that digit is copied to the output string. Otherwise, a "0" is stored in that position in

the output string.

Digit placeholder. If the value being formatted has a digit in the position where the "#" appears in the format string, then that digit is copied to the output string. Otherwise, nothing is stored in that position in the output string.

. Decimal point. The first "." character in the format string determines the location of the decimal separator in the formatted value; any additional "." characters are ignored. The actual character used as the decimal separator in the output string is determined by the Decimal Separator global variable.

The default value of Decimal Separator is specified in the Number Format of the Regional Settings section in the Windows Control Panel.

, Thousand separator. If the format string contains one or more "," characters, the output will have thousand separators inserted between each group of three digits to the left of the decimal point. The placement and number of "," characters in the format string does not affect the output, except to indicate that thousand separators are wanted. The actual character used as a the thousand separator in the output is determined by the Thousand Separator global variable. The default value of Thousand Separator is specified in the Number Format of the Regional Settings section in the Windows Control Panel.

E+ Scientific notation. If any of the strings "E+", "E-", "e+", or "e-" are contained in the format string, the Integer is formatted using scientific notation. A group of up to four "0" characters can immediately follow the "E+", "E-", "e+", or "e-" to

determine the minimum number of digits in the exponent. The "E+" and "e+" formats cause a plus sign to be output for positive exponents and a minus sign to be output for negative exponents. The "E-" and "e-" formats output a sign character only for negative exponents.

'xx'/"xx" Characters enclosed in single or double quotes are output as-is, and do not affect formatting.

; Separates sections for positive, negative, and zero numbers in the format string.

The locations of the left most "0" before the decimal point in the format string and the right most "0" after the decimal point in the format string determine the range of digits that are always present in the output string.

The Integer being formatted is always rounded to as many decimal places as there are digit placeholders ("0" or "#") to the right of the decimal point.

If the format string contains no decimal point, the value being formatted is rounded to the nearest whole number.

If the Integer being formatted has more digits to the left of the decimal separator than there are digit placeholders to the left of the "." character in the format string, the extra digits are output before the first digit placeholder.

The following table shows the effect of various format strings:

Display Format Value Result Comment

#.## 12.2 12.2 Note extra digit to right of decimal still appears
#.00 2.5 2.50 Note extra zero: field will always show two decimal places
00.## .006 00.01 Note extra 0s to the right of decimal point and rounding to two decimal places.

To allow different formats for positive, negative, and zero values, the format string can contain between one and three sections separated by semicolons.

* One section: The format string applies to all values.

* Two sections: The first section applies to positive values and zeros, and the second section applies to negative values.

* Three sections: The first section applies to positive values, the second applies to negative values, and the third applies to zeros.

If the section for negative values or the section for zero values is empty, that is, if there is nothing between the semicolons that delimit the section, the section for positive values is used instead.

If the section for positive values is empty, or if the entire format string is empty, the value is formatted using general floating-point formatting with 15 significant digits. General floating-point formatting is also used if the value has more than 18 digits to the left of the decimal point and the format string does not specify scientific notation.

Memo Field

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Memo Field allows users to associate memo information about a document and can contain many pages of text information. Auto-Indexing Variables can be used to pre-populate memo fields with data drawn from variables such as, Cabinet, Drawer or Folder Name, Network User Name, Today's Date, Incrementing numbers and more. Memo data can then be used in full-text document searches.

To add information to a memo field:
- Open the Document Window
- Highlight the Memo Field
- Click on the down arrow at the right side of the field to bring up the text box
- Enter text in the text box or copy and paste text into the text box

 or

- From the Document List View press the F2 key to allow editing
- Click on the memo field to bring up the memo field text box
- Enter text or paste text from the clipboard

A Memo Field is displayed as an icon in a field. The icon displayed will change depending on contents of the memo text box:

Memo Field with Text -

Memo Field without Text -

Edit Masks

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Edit Masks can be user-defined in the Field Properties dialog box.

Use Edit Mask to restrict the characters users can enter to validate characters and formats. If users attempt to enter a character that is not valid, the character will not be accepted. Validation using the Edit Mask property is performed on a character-by-character basis.

DocuXplorer provides you with standard mask templates that can be chosen from the drop down list in the Edit Mask Field. To create an Edit Mask use the following information details in creating the Edit Mask Template.

Creating a User-Defined Edit Mask

To create an Edit Mask you must use the programming characters that DocuXplorer will recognize as a data input mask. The following information will give you details on these programming characters:

A mask consists of three sections separated by semicolons. The first section of the mask are the characters that represent the mask.

Read the section "Character Meaning in a Mask" to determine what characters need to be entered to create a user-defined mask.

The second part is the character that determines whether the mask data is store as displayed.

The third part of the mask is the character used to represent automatically generated characters in the mask.

Character Meaning in a Mask

!   If a ! character appears in the mask, optional characters are represented in the text as leading blanks. If a ! character is not present, optional characters are represented in the text as trailing blanks.

> If a > character appears in the mask, all characters that follow are in uppercase until the end of the mask or until a < character is encountered.

< If a < character appears in the mask, all characters that follow are in lowercase until the end of the mask or until a > character is encountered.

<> If these two characters appear together in a mask, no case checking is done and the data is formatted with the case the user uses to enter the data.

\ The character that follows a \ character is a literal character. Use this character to use any of the mask special characters as a literal in the data.

L The L character requires an alphabetic character only in this position. For the US, this is A-Z, a-z.

l The l character permits only an alphabetic character in this position, but doesn't require it.

A The A character requires an alphanumeric character only in this position. For the US, this is A-Z, a-z, 0-9.

a The a character permits an alphanumeric character in this position, but doesn't require it.

C The C character requires an arbitrary character in this position.

c The c character permits an arbitrary character in this position, but doesn't require it.

0 The 0 character requires a numeric character only in this position.

9 The 9 character permits a numeric character in this position, but doesn't require it.

The # character permits a numeric character or a plus or minus sign in this position, but doesn't require it.

: The : character is used to separate hours, minutes, and seconds in times. If the character that separates hours, minutes, and seconds is different in the regional settings of the Control Panel utility on your computer system, that character is used instead.

/ The / character is used to separate months, days, and years in dates. If the character that separates months, days, and years is different in the regional settings of the Control Panel utility on your computer system, that character is used instead.

; The ; character is used to separate the three fields of the mask.

_ The _ (underscore) character automatically inserts spaces into the text. When the user enters characters in the field, the cursor skips the _ character.

Any character that does not appear in the preceding table can appear in the first part of the mask as a literal character. Literal characters must be matched exactly in the edit control. They are inserted automatically, and the cursor skips over them during editing. The special mask characters can also appear as literal characters if preceded by a backslash character (\).

The second field of the mask is a single character that indicates whether literal characters from the mask should be included as part of the text for the edit

control. For example, the mask for a telephone number with area code could be the following string:

(000)_000-0000;0;*

The 0 in the second field indicates that the Text property for the edit control would consist of the 10 digits that were entered, rather than the 14 characters that make up the telephone number as it appears in the edit control.

A 0 in the second field indicates that literals should not be included, any other character indicates that they should be included. The character that indicates whether literals should be included can be changed in the Edit Mask property editor, or programmatically by changing the MaskNoSave typed constant.

The third field of the mask is the character that appears in the edit control for blanks (characters that have not been entered). By default, this is the same as the character that stands for literal spaces. The two characters appear the same in an edit window. However, when a user edits the text in a masked edit control, the cursor selects each blank character in turn, and skips over the space character.

Note:

When working with multibyte character sets, such as Japanese Shift-JIS, each special mask character represents a single byte. To specify multi-byte characters using the L, l, A, a, C, or c specifiers, the mask characters must be duplicated as well. For example, LL would represent two single-byte alphabetic characters or a one double-byte character. Only single-byte literal characters are supported.

Index Set View
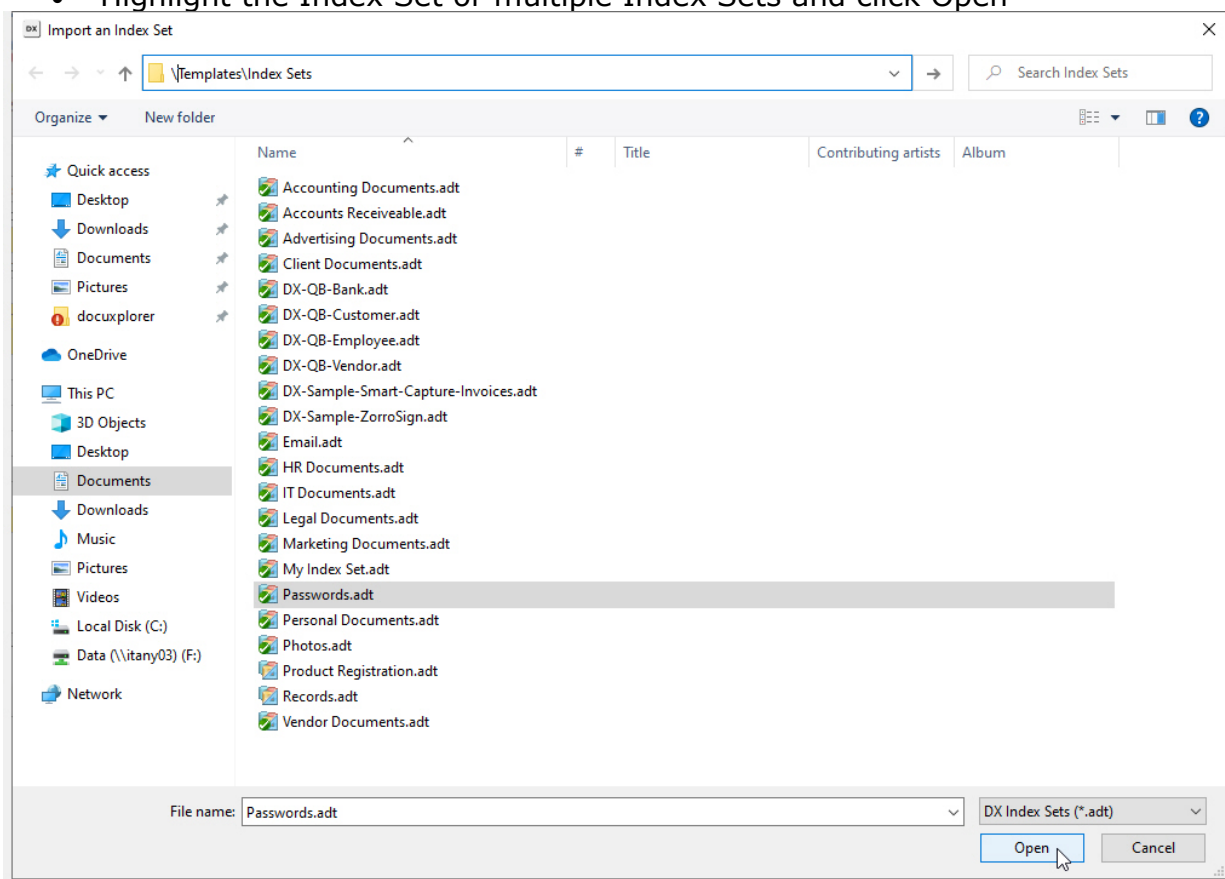
This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Index Set view is a drop-down list that determines which index should be used for the documents in the selected folder. It is found on the Toolbar when a Folder has been selected.

The Document Filter affects the display of the current Document List View.

Choosing an Index Set from the Folder Filter drop-down list will cause the folder to display only documents with that Index Set assigned to them. The Column Header Bar for the folder will display the fields and properties assigned to the selected Index Set.

To see all the documents contained in a folder select All Documents from the Folder Filter List. If All Documents is selected as the filter, only the fields assigned to the All Documents Index Set will display on the Column Header Bar. The index information displayed for a document when using the All Documents Index Set filter will be the data attached to the document's assigned Index Set.

Tip:

It is recommended that Folders be defaulted to an Index Set and all documents stored in a folder be associated with the Folder's default Index Set.

It is also recommended that the Subject Field entry be descriptive of a document's contents so that when in All Document display mode you can distinguish between documents..

The Index Set as a Default Folder Property

Index Sets can be assigned to a folder as a default property. When a folder has an Index Set Default Property assigned, it will automatically filter the display so that only documents with that Index Set assigned to them will display. When adding documents to a folder with the Index Set Property, the Document Window that opens will automatically display the default index set. The default Index Set is determined by the settings of the parent object the Folder is inheriting its

properties from. Users can change the Index Set Property assigned to a folder from the [Folder Properties dialog box](#).

Reassign this column's information to...

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Reassign this column's information to... function is an administrator only function that allows the values of a field within an Index Set to be moved into a different visible field in the same Index Set.

Reassigning the information in a column moves the data from one field column in an Index Set into another field column. The administrator selects the destination field from one of the visible user-defined fields associated with the Index Set. The administrator can choose to overwrite existing data with reassigned data or fill only blank fields with reassigned data. On completion of the reassignment the data is emptied from its original field.

To reassign the information in a column:
- Right click Document List View Column Header Bar directly over the field with the value to be reassigned
- Select Reassign this columns information to

- Select from the list of fields available to accept the reassigned values
- Click Yes on the confirmation screen to proceed with the reassign
- Choose to overwrite the existing data, if you select No only the blank fields will filled with the reassigned data

Tip:

A reassign will move all the index data assigned to each document in that Index Set into the field selected to accept the reassigned data. Reassignment can not be Undone and a backup is recommended before attempting the reassignment.

The Reassign column information function is based on a Cabinet and will only affect documents in that Cabinet. If you wish to reassign all the documents associated with that Index Set in other Cabinets you will need to repeat the process in each Cabinet.

Index Set Manager

About the Index Set Manager

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The Index Set Manager is accessed from the Index Set Tools button on the Icon Toolbar. The Index Set Manager will display listings of Index Sets that are relevant to the object in focus, Library or Cabinet.
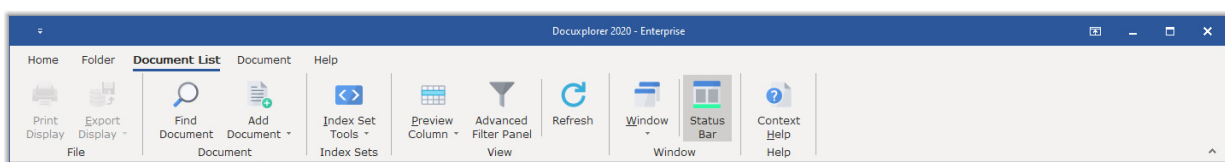
The Index Set Manager displays a list of Index Sets.
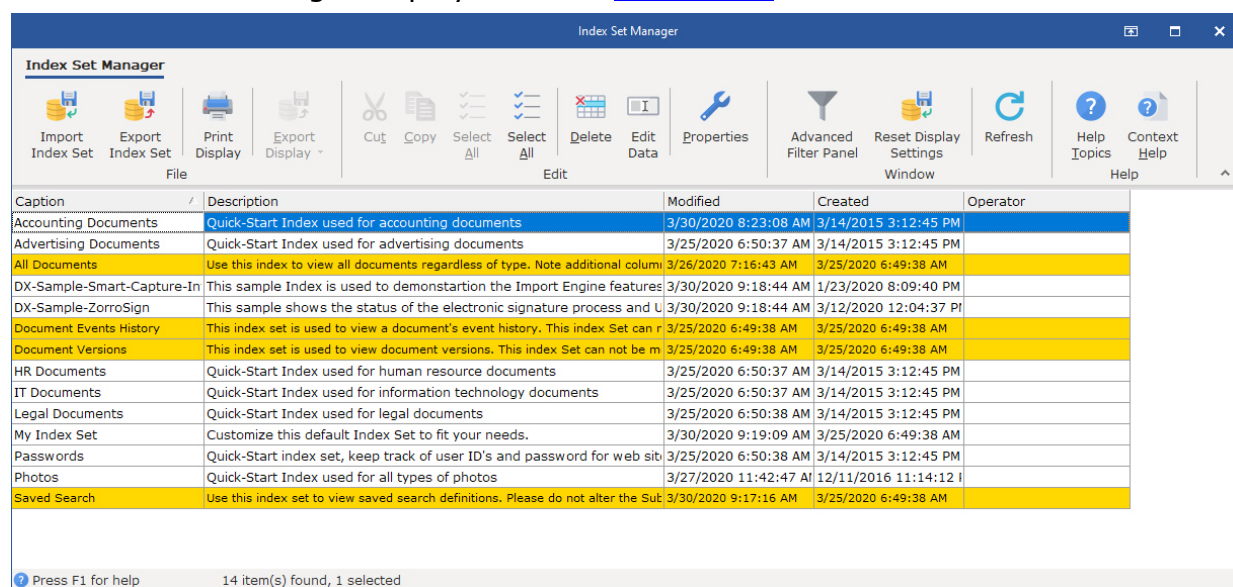
The following functions can be performed on the listed Index Sets;

From the right-click menu:
- Delete **-** provides administrators with a method of removing Index Sets from the selected Cabinet

- Reassign - allows administrators to change the Index Set for a document or group of documents
- Upgrade Field Properties to New Version - will upgrade old versions of exported Index Sets to the newest version
- Properties - allows administrators to set users, groups allowed to view the Index Set and its security properties. Renaming an Index set is also covered as an Index Set property

From the File Menu
- Export Index Set - allows user to export the files associated with an Index Set
- Import Index Set - allows users to import an Index Set to the Library
- Print Display - print the display of the Index Set Manager
- Export Display - export the display to an external file format, XLS (Excel), HTML, XML, or TXT

From the View Menu
- Reset Display Properties - will reset the field's display properties of the grid to the default
- Advanced Filter Panel - set filter on the Index Set Manage display
- Advanced Filer Panel Show/Hide - show or hide Advanced Filter Panel

Tip:

By default an Index Set's properties: users, groups and permissions are set to the Library default. When creating an Index Set administrators can add users and groups and change their permissions to from the [Index Set Properties](#).

Delete an Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Index Sets are deleted using the Index Set Manager. Deleting an Index Set is only possible if there are no documents associated with that Index Set.

Index Sets are associated with a Cabinet. When displaying the Index Set Manager while in a Cabinet the list will display only Index Sets associated with that Cabinet.

Deleting an Index Set from a Cabinet will only delete the association of that Index Set with that Cabinet. Deleting an Index Set from the Library Work Folder will attempt to delete the Index Set from all Cabinets and the Library entirely.

To delete an Index Set from a Cabinet:
- Select a Folder in the Cabinet
- Select Index Set Manager from the Index Set Tools menu on the Icon Toolbar
- Highlight the Index Set, right-click and select Delete

To delete an Index Set from the Library:
- Select the Library Work Folder
- Select Index Set Manager from the Index Set Tools menu on the Icon Toolbar
- Highlight the Index Set, right-click and select Delete

Tip:

If any document in any Cabinet is still using that Index Set DocuXplorer will not let you delete the Index Set. You can Reassign documents with the Index Set to be deleted to another Index Set in that Cabinet, and then delete the Index Set in question. See Reassign an Index Set.

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Reassign an Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Reassigning an Index Set will change the Index Set association of documents in a Cabinet.

Warning:

Reassigning an Index Set must be carefully thought out before you perform the reassign.

All fields are arranged in columns and originally titled Text Field 01, Text Field 02, etc., in order to reassign data from one Index Set to another the data will have to reside in the same column, in other words all data that is in what had been Text Field 01 in Index Set B can only be reassigned to the Text Field 01 column of Index Set A. Make sure you perform a backup before you perform any reassign so you can go back to your original settings if the reassign was improperly implemented.

Tip:

- This function allows a user to combine documents associated with different Index Sets and is most often used when duplicate Index Sets have been created with different names.
- Reassign is specific to a Cabinet and will need to repeated for each Cabinet.
- Reassign will also reassign the default Index Set for all Folders defaulted to that Index Set in a Cabinet to the newly assigned Index Set.

To reassign the field names of an Index Set:

- From the Index Set Tools Menu of the Icon Toolbar, select Index Set Manager
- Highlight the Index Set that you wish to reassign
- Right click the Index Set to reassign
- Click Reassign…
- From the drop down list choose the Index Set you wish to use as the new set of field names
- Click OK

Reset Field Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Reset Field Properties when applied to an Index Set will reset that Index Set's fields and properties to the program's default All Documents. No data will be lost but the Index Set will need to recreated exactly as it had been previously for the data to be displayed in the proper columns with the proper headings.

To Reset Field Properties:
- From the Index Set Tools Menu of the Icon Toolbar, select Index Set Manager
- Highlight the Index Set where properties will be reset
- Right click the Index Set to reassign
- Click Reset Field Properties

Export an Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

In the Index Set Manager a user can export the files associated with an Index Set. This function is valuable in creating backups of your Index Sets so they can easily be recovered if any damage occurs to your computer.

To Export an Index Set
- From the Index Set Tools Menu of the Icon Toolbar, select Index Set Manager
- Highlight the Index Set that you wish to export
- From the File menu select Export Index Set
- From the browse screen that appears select a Windows folder or create a new folder to place the Index Set files
- The path needs to start with the same format as the database connection path e.g. if the data connection path is \\MyServerName the export location needs to start with \\MyServerName\ Any Folder Name. If database connection path starts with C:\ then the export location needs to start with C:\. If you do not follow these directions the program will lockup or raise an connection error.
- Click OK

The .adm and .adt files that make up the Index Set are then placed in the selected folder and can be imported back to Library if needed.

Import an Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

In the Index Set Manager the Import an Index Set menu item allows a user to import the files that make up an Index Set to add the Index Set to the Library

To Import an Index Set
- From the Index Set Tools Menu of the Icon Toolbar, select Index Set Manager
- From the <File> menu item select <Import Index Set>
- Locate the Index Set to import using the Import Index Set browse screen
- DocuXplorer Quick-Start Index Sets are available for import in \Program Files\DocuXplorer\Templates\IndexSets for Personal and Professional and for Enterprise in \\ServerName\DXDocs\DXInstall\Templates\IndexSets available for import
- Highlight the Index Set or multiple Index Sets and click Open

The Index Set will automatically be imported and added to the Library.

DocuXplorer for QuickBooks Note:

When using the DocuXplorer for QuickBooks Integration Utility you will need to use this function to import the QB Index Sets to allow DocuXplorer to automatically index QuickBooks related documents.

Index Set Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Index Set Properties are located by selecting the <u>Index Set Tools Menu</u> from the Icon Toolbar and clicking Manage Index Sets. Highlight the Index Set to be worked with and right-click to bring up a menu, then select Index Set Properties.

 Index Set Properties allows an administrator to rename an Index Set or change <u>security permissions</u> and add or delete Users and Groups for the Index Set. Index Set Properties are synchronized across the Library. A change to an index Set will be replicated to every Cabinet associated with that Index Set.

Index Set Properties/General

The General Index Set Properties item contains information associated with the index Set. They are:

Index Set - a unique identifier for each Index Set

Permission ID - display the unique identifier for the Permission Set either created for inherited by the Index Set

Modified - Date and time the Index Set was last modified

Create - Date and time the Index Set was created

Operator - the user or administrator that last modified the Index Set

Caption - the name assigned to the Index Set - this field is modifiable and can be used to rename an Index Set

Description - an editable field to leave memo notes about the Index Set

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Index Set Properties/Export File Name

Use this dialog box to select sets of field data to be used for the file name when a document is exported to a hard drive or sent as an attachment to an email. This function must be specifically set for each index set.

[To create an Export File Name:](#)
- Put a check in the box associated with the fields that DocuXplorer should use to create a string that will be the export file name
- Select the order for the string by dragging and dropping the field name into the proper place - you can see the order at the top of the check boxes.

Tip:

Date fields used for export file names will be displayed as mm-dd-yyyy.

The default field used when creating an export file name is the Subject field. Only when other fields from an Index Set have been selected to be the export file name can the Subject field be unchecked.

Index Set Properties/Key Fields
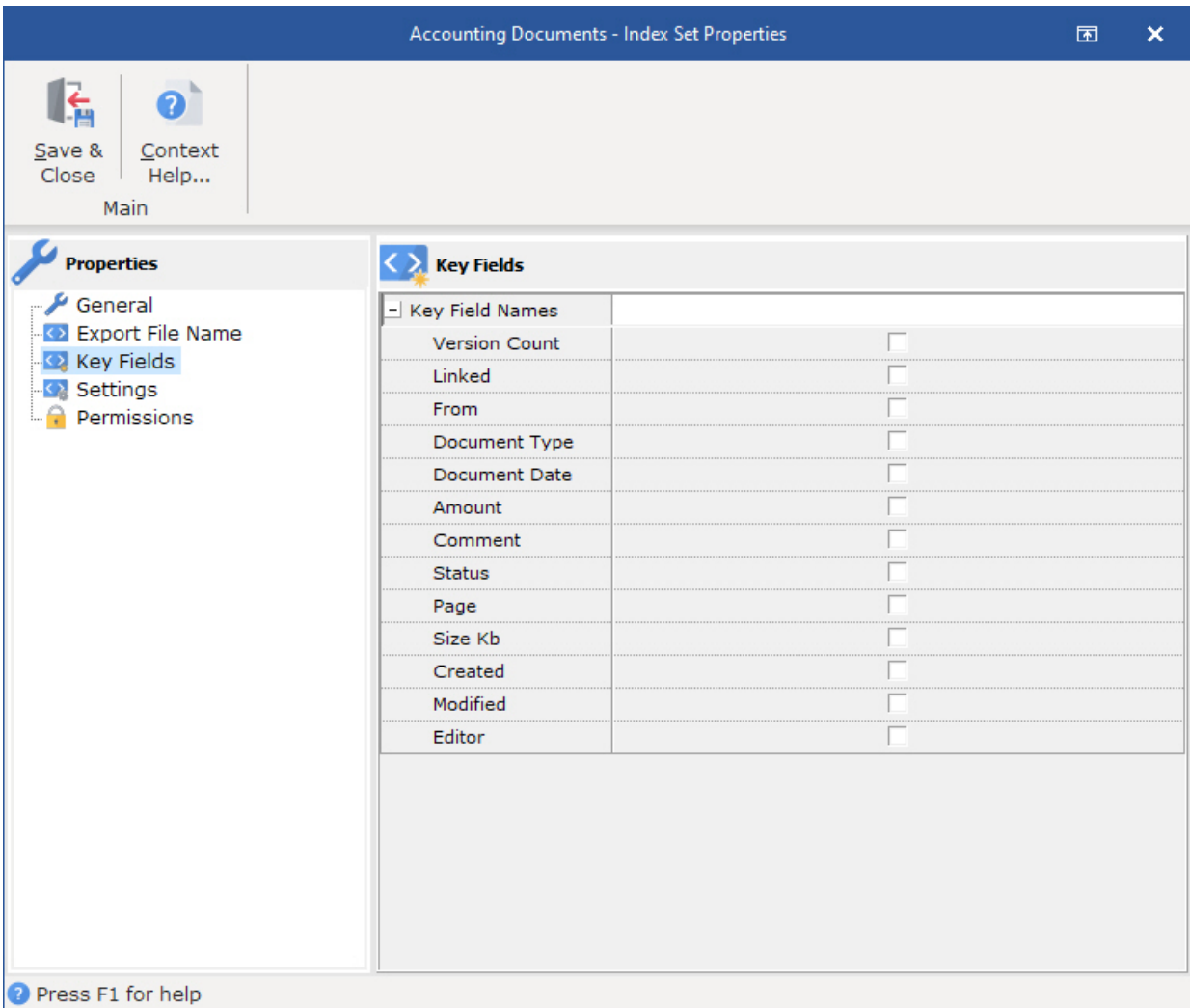
Use the Key Fields feature to prevent duplicate index set values for documents. Since DocuXplorer can handle any type of document, there may be times when an index value or group of index values need to be unique for each document (e.g. Product Number, Product Code, Customer Name and Social Security Number are just some of the typical key field values types).

To enable this feature, check off the column or columns that are to be unique for a given index set.

When are Key Violations applied?

This feature is enabled once a field has been checked off and any time a document is added or modified, either individually or in batch. When you cut or copy a document, DocuXplorer will look for key violations and raise a warning dialog to inform you of the Key Violation. Only when you delete a document will this rule not be applied.

Index Set Properties/Settings
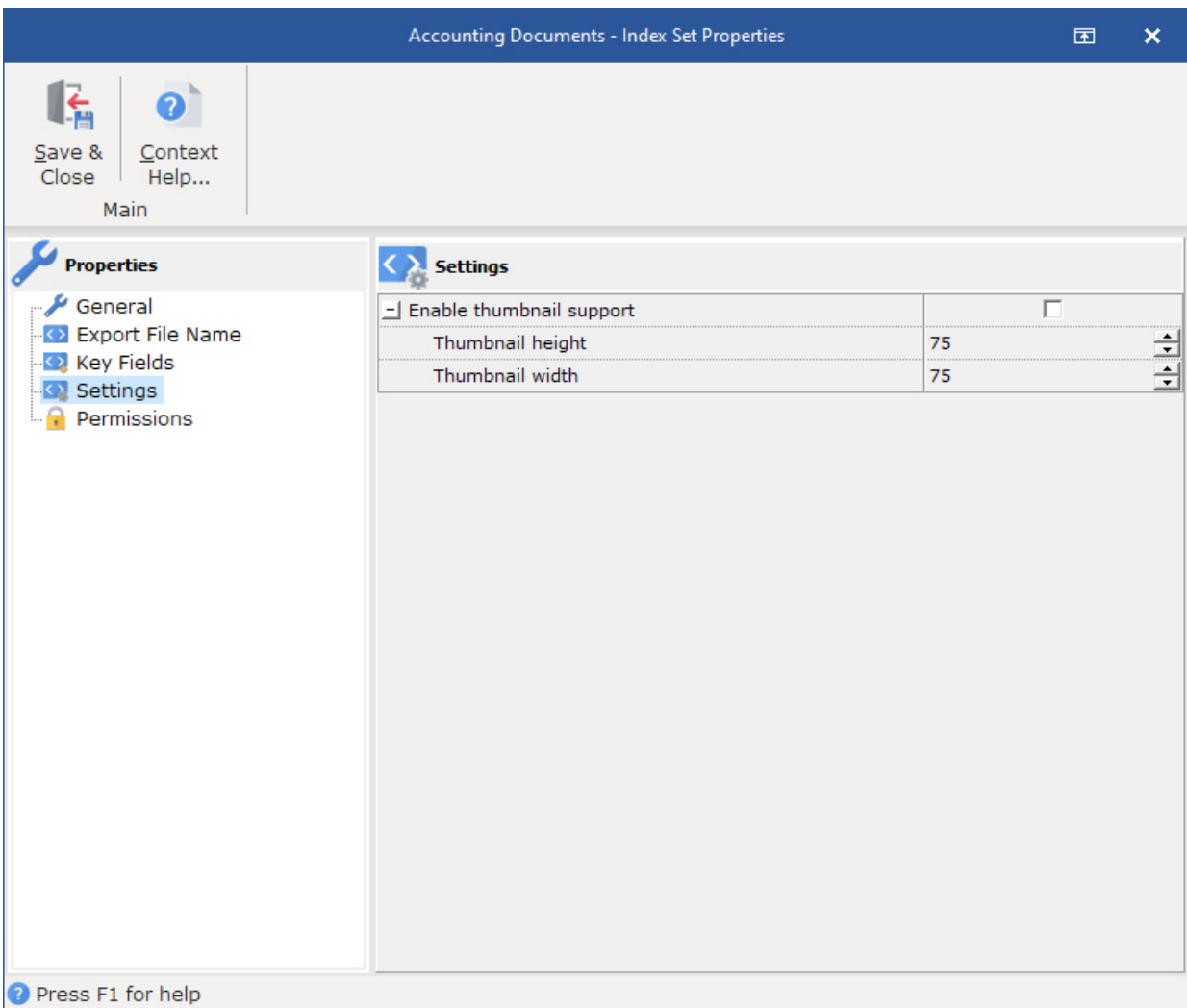
Document thumbnail support enables a user to preview a small image of the document's first page. This enables a user to quickly scan a list of documents and quickly identify the ones of interest. The thumbnail graphic engine will generate images for MS Office documents, PDFs, TIFs and a variety of standalone graphic file formats. If an image cannot be generated, then an icon for the file format is generated. Thumbnails are generated when the document is first added and after

any modification are made. This feature can executed manually for those documents that already exist.

To enable greater control, each Index Set has its own properties to control the thumbnail behavior.

There are three steps to enable this feature:
1. Setting the option to be enabled
2. Setting the default size of the thumbnail
3. Adding the column that displays the thumbnail image.

To enable the thumbnail process and set its size, select Tools | Index Set Tools | Manage Index Set. Right click on the Index Set you have selected, and select Properties | Index Set Settings, then check off "Enable thumbnail support". You may also adjust the size as needed. When done, click Save and Close on the dialogs to save your changes

From the document list view, select the same Index Set name you used in the steps above and right click on any one of the column titles, then select Add Fields. On the list, you will see the title 'r;Thumbnail.' Drag and drop this column next to the column of your choice.

Once you have completed the steps above you can then generate thumbnails for selected documents that already exist. Simply select one or more documents from the Document List View or the Find Document dialog, right click on a document, and select Update Document
Thumbnail.

Index Set Properties/Permissions

To set up Index Set security administrators will use the Index Set Permissions Item located by selecting the Index Tools Menu and clicking Manage. Highlight the Index Set to be worked with and right-click to bring up a menu, then select Index Set Properties to add or delete Users and Groups and set permissions for the Index Set.

Tip:

- Default Index Set permissions are set at the Library.

- A new Index Set will inherit the permissions set for its template. If the new Index Set's permissions are changed it will become a parent object and any Index Sets created from it as a template will inherit the new permission set.

Important:

Each Index Set has its own set of properties and permissions. By default an Index Set's properties: users, groups and permissions are set to the Library's defaults to assure security. When creating an Index Set administrators can modify Index Set permissions.

Permissions allow you to add users and groups and set security properties for users and groups for the Index Set.

- See the Security/Users/Groups help item for more information on how to add users and groups to an Index Set.
- See Security/Index Set and Field Permissions for more information about setting Index Set permissions.

Security

Security Overview

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

DocuXplorer security is based on <u>users and groups of users</u>.

Users/Groups

> Users are individuals for which the administrator has assigned a login name and optionally, a password. Groups consist of users who have the same set of security permissions. The Administrator user displayed in bold cannot be deleted or renamed.

Note: Passwords are required for compliance with SEC and HIPAA regulations.

Tip:

> For clients who do not want to implement DocuXplorer security features but do want to use the document audit trail; add all your users and select the Login Required option in the DocuXplorer desktop menu item Tools/Options/Library. One easy way to accomplish this is to create a single Group called Everyone with Read/Write or Full Control permissions. Drag and drop all your users into the Everyone group thereby giving all your users full permissions while tracking their usage in the Document Event Logs.

<u>Administrators</u> set permissions for the functions of a DocuXplorer object for each user or group of users. Administrators can give permission for a user or group to modify permissions for any DocuXplorer Object.

> DocuXplorer Objects include the: Library, Cabinets, Drawers, Folders, Documents and Index Sets. Administrators can set users/groups and permission for a DocuXplorer Object in its properties dialog box.

Tip:

> Security changes made to a Cabinet open on a user's workstation will not take affect until the Cabinet has been closed and reopened.

Login

> Login provides users with a specific set of permissions assigned by the Administrator. <u>Administrators should require that users login to DocuXplorer</u>

each time they open the program. Administrators can choose to allow users to login using either the login and password as set in the [Tools/Options/Manage Users/Groups Item](#) or use the users existing network login.

Permissions

Permissions can be set for any function on a DocuXplorer Desktop Object menu: such as add, view, modify, create objects, print, email, and more. For ease-of-use, DocuXplorer provides Permission templates to automatically set the most common permissions for groups and users. These template permission levels affect the selected object and all objects below it.

Permissions can be set for the following objects in their properties dialog box click an object for more information:

[Library](#)

[Drawer](#)

[Folder](#)

[Document](#)

[Index Set](#)

[Index Field](#)

Tip:
- Permission sets are synchronized across a Library.
- Close all Cabinets when making changes to permissions.
- Changes in permissions are posted to a Cabinet when it is reopened after a change.

[Security Properties Inheritance](#)

By default DocuXplorer objects inherit security permissions from their parent object. A parent object is the DocuXplorer object directly above it in the hierarchy. As new objects are created they inherit the Users and Groups with their associated permissions from their parent object. You can break an inheritance chain at any object by changing its users, groups or their permissions. That object can then become the parent of a new inheritance chain by choosing to [Replace permissions on all its child objects](#), making it the parent of the objects below it.

For example:

A law firm has setup all of their users and group permissions in the Library object. When they create a new Cabinet it will automatically inherit the same users and group permissions that were set for the

Library object - "Inheritance from a Parent Object". When additional Drawers in the new Cabinet are created, the Drawers will inherit their security settings from the Cabinet object. The concept of "inheritance" flows down to Document object which is the lowest object in the Library hierarchy.

Changes can only be made by users with [Administrator rights](#) or user and groups with permission to modify permissions.

Changes can be made to the security settings for any object level in its properties dialog box.

Important: To make a change in user/group permissions at any object below the Library object you must uncheck the "Inherit permissions from parent" item. If left checked changes will be overridden by permission inheritance from the parent object.
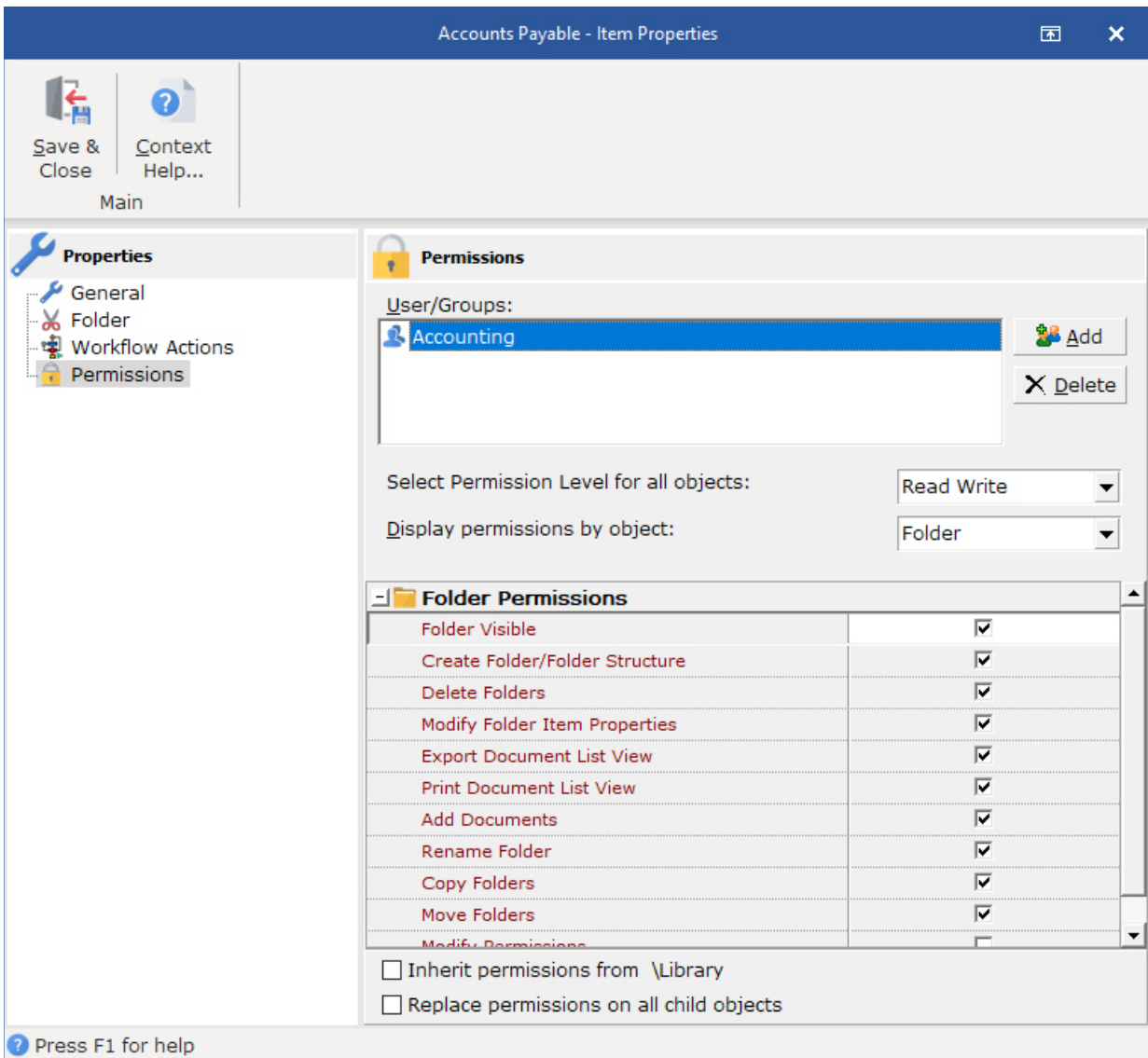
When a change is made in an object's permissions you have the choice of allowing the change to overwrite the settings of all its child objects by selecting "Replace Permissions on all Child Objects" .

When you replace the permissions on a Child Object, any permissions previously set on an object below the object being changed will lose those changes when they are overwritten by the parent object permissions.

Tip:

It is recommended that all users and groups be added at a Parent Object to allow for inheritance down to the object where you will make changes to the inheritance. If a user or group is added to an object below the Parent Object the new users or groups will have to be added to all objects above it, up to the Parent Object.

Visibility

DocuXplorer allows an administrator to set the DocuXplorer Desktop display for each user or group by using the visibility permission for a DocuXplorer object. Using this powerful feature an administrator can deny a user or group the ability to see an object, tailoring the DocuXplorer Desktop to each users or groups specific needs. See each object's permission topic for more information.

For example:

The Human Resources Department needs to secure their confidential documents so that only human resources personnel can view them. To do this the DocuXplorer administrator would create a group called HR, placing all HR personnel in the group. From the Human Resources Cabinet Properties/Permissions dialog box the administrator would add the HR Group and create a custom set of permissions as required by the specific needs of the group and select the option to "Replace permissions on child objects" to insure that a Cabinet search by a non-HR Group user will not reveal any document to unauthorized users.

Index Set and Field Security

DocuXplorer security also includes the ability to secure Index Sets and Index Fields. Administrators can set permissions to allow or disallow modification of Index Sets and Fields. In additional permissions can be assigned to an Index Field to allow only specific users or group to view a field and leave it invisible to other users. See the Index Set and Field Security Topic for more information.

For example:

In the HR Index Set a field has been created with employee salary information. The HR manager does not want all members of the HR department to see this confidential information but does wish to view the data for herself and allow it to be viewed by other specific company executives. The administrator would create a group of users and in the Index Field Properties Permissions dialog box and set the field to be Visible only to the assigned group which would consist of the HR Manager and specific executives.

Administrators

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

An Administrator is a user with full rights to all the functions of DocuXplorer. A DocuXplorer administrator is the person or persons who are responsible for setting up DocuXplorer defaults and permissions in your organization. More than one user can have administrator rights enabled. Administrators should take the time to become familiar with all the information in this help program.

Create administrators and their passwords in the DocuXplorer desktop menu item Tools/Options/Users/Groups.

By default DocuXplorer creates an Administrator user in the User List. The default password for this Administrator user is "admin" all in lower case. All passwords are case-sensitive.

Note:

When setting up security in DocuXplorer you must change the default password for the Administrator account so that users can not use the default password to bypass security.

Add additional user names and passwords and place a check in the Administrator to give that user administrator rights.

Users/Groups

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

Users are individuals for which the administrator has set up a login name and password. Permissions can be set for individual users.

Groups consist of one or more users that will have the a specific set of security permissions for an object.

Manage User/Groups - allows an administrator to add new users and groups and use drag and drop to add users from the user list to a group.
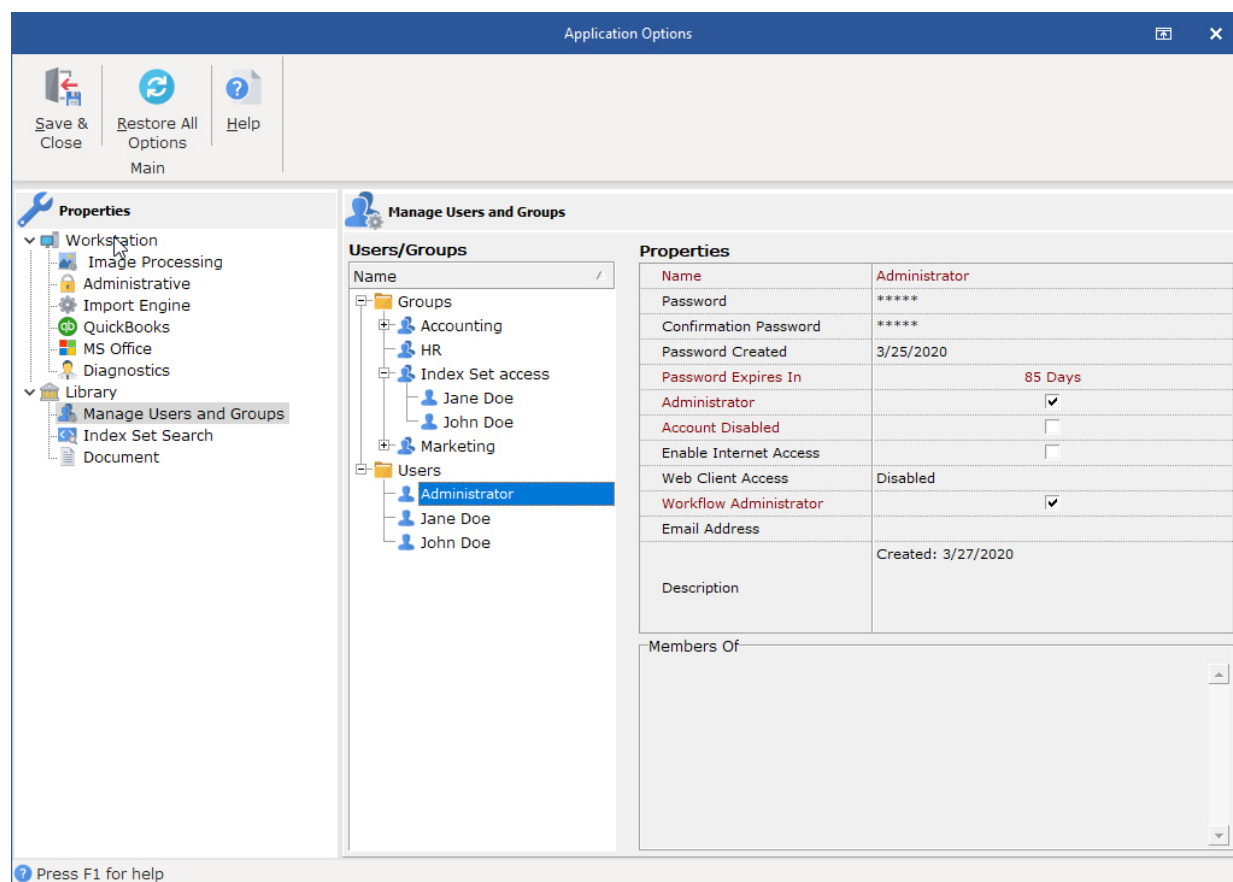
Settings - allows an administrator to set passwords and other user specific items

Name - user name.

Password - enter the user password.

Confirm Password - reenter user password.

Password created - Date the password was last changed.

Password expires in - When the password will expire and must be changed.

Administrator - check if user is an administrator. Administrators have full rights to DocuXplorer and can make changes to properties.

Account Disabled - allows administrator to disable a user without removing them from the user list.

Desktop Internet Access - check this item if a user is at a remote workstation and will access DocuXplorer over the Internet

Web Client Access - enable this item if you would like the user to be able to access the web interface through their browser.

Workflow Administrator - check this item if you would like the user to have full access to the workflow module in DocuXplorer.

Email address - enter the email address of the user so they can have documents sent to them through DX and get workflow notifications.

Description - allows users to enter information about the user. This field will also display the Network Source if the user was added via import.

Member of - provides a list of groups a user is a member of.

To add a User:
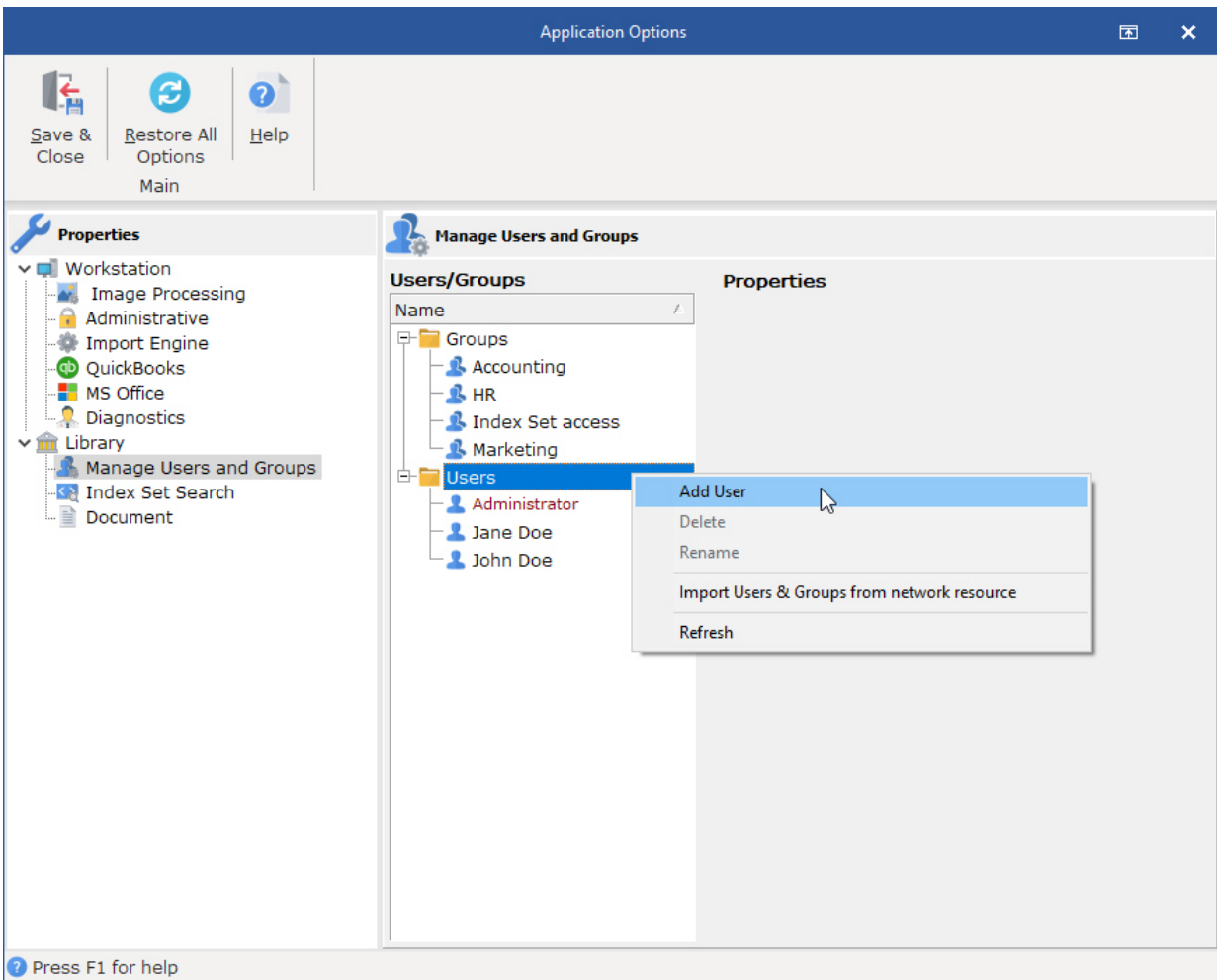
- In the Manage Users/Groups Window right-click Users to bring up a menu
- Select Add from the menu
- Enter the User Name
- Enter the users' password the Password field
- Enter the same password in the Password Confirmation field
- Check Administrator if user is to have full read/write access to all objects in DocuXplorer
- Check Desktop Internet Access if the user is to connect to DocuXplorer from a remote computer via the Internet
- Check Web Client Access if the user should be able to access the web interface.
- Set Workflow Administrator to Enabled if the user should have full access to the workflow module.
- Email Address - enter the email address of the user

Repeat to add additional users

When the complete list has been created click the Menu Bar item Save and Close

Tip:

- Account Disabled is used to prevent access by the disabled user to the DocuXplorer Library
- If a user is deleted all of their permissions will be removed.
- Passwords are case-sensitive. Login names are not case-sensitive.

To add a Group:
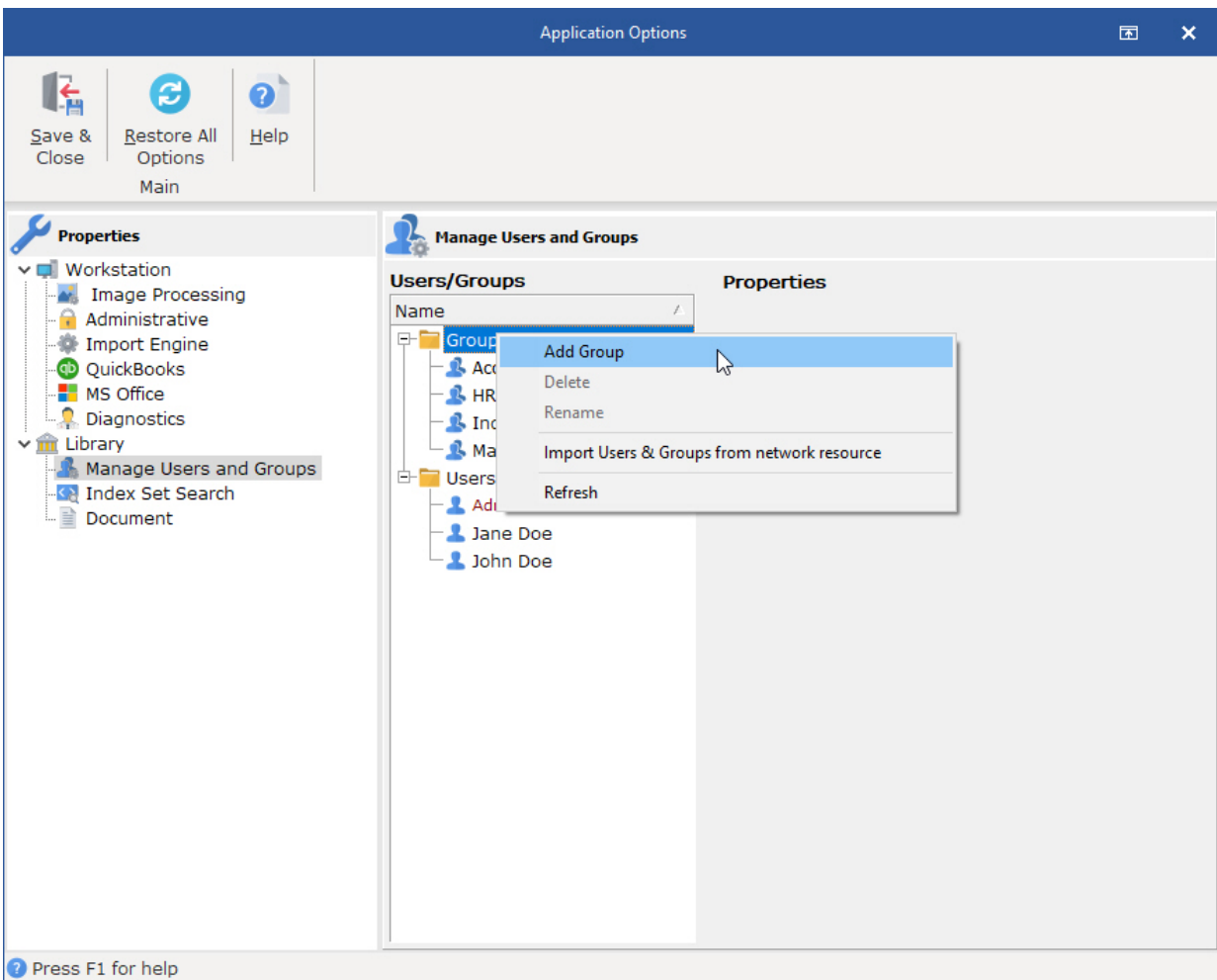
- In the Manage Users/Groups Windows right-click the Group item to bring up a menu
- Click Add
- Enter the Group Name
- Enter Group Description as needed

Tip:

If a group is deleted all of its permissions will be removed.

Import user and groups from network resource

DocuXplorer will automatically populate the Group or User List with selected groups or user names contained in a Microsoft Active Directory. DocuXplorer does not synchronize to the Active Directory so any changes or deletions made in the Active Directory will also have to be made in DocuXplorer.

To retrieve user names:
- Right click the item, either User or Group in the Users/Groups Window to bring up a menu
- Select Import user and groups from a network resource
- Select the name of the server or workstation with the list to retrieve
- Highlight the groups/users to add from the list of Active Directory Selections
- Click OK
- Create passwords for each user name

Tip:
- Change the display of the Active Directly Selection List using the filter item. Display Groups and their associated users in a logical tree or as a list of users.
- To speed the DocuXplorer startup process do not include accounts that will not need access to DocuXplorer.

Refresh - will refresh the screen display

To delete a user or group from the list:
- Right-click on the User or Group and select Delete from the menu

To add a user to a group:
- Drag and drop the user from the user list onto a group

Tip:
A user added to a group automatically inherits the groups permission sets.

To rename a user or group from the list:
- Right-click in the Manage Users/Groups Windows and select Rename from the menu
- Type in the new name
- Click Save and Close

Tip:
- Do not have more than one administrator make changes at the same time.

- Avoid making changes to users or groups while the users are logged into DocuXplorer
- Renaming of a user or group should not be executed while the users in the group have DocuXplorer tables open.
- Security effects of Adding new Users/Groups or changing permissions will not be realized until the affected Library or Cabinet is reopened at a workstation.
- **It is recommended that all users and groups be added at the highest level Parent Object to allow for inheritance down to the object where you will make changes to the inheritance. If you are adding a user or group to an object below a Parent Object the new users or groups will have to be added to all objects above it, up to the Parent Object for permissions to effective on all objects in the hierarchy.**

Select permission level for object

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

DocuXplorer provides defaulted permissions settings to make security setup as easy as possible. Administrators can also use these preset permission defaults and add or delete permissions to create custom permission sets.

The available Permission Level settings are:

Read Write - preset permissions that allow a user or group to add, read and modify documents. Users can also create folders, view document version, event logs, and send document to print or email.

Read Only - preset permissions that only allow a user or group to view documents. Users will not be able to add or modify documents, create folders or send document to print or email.

Full Control - preset permissions that gives the user access to most functions in DocuXplorer. This preset is similar to the permissions allowed to an administrator.

Custom - If any changes are made to a preset or an administrator creates a new set of permissions for a user or group the permission level is automatically set to Custom.

Custom Permission Level

An administrator can create a custom set of permissions for a user or group.

To create a Custom Permission Set:

- In the Display permissions by object field select Show All Objects. This will display all permissions available for each object in DocuXplorer.
- Select the permissions to allow for this custom permission set.
- Click Save and Close

Library Permissions

This Help topic refers to the following editions:
☑ Professional ☑ Enterprise

Administrators will use the Library Permissions Item, located by right clicking the Library and selecting Library Properties, to add or delete Users and Groups and set permissions.

By default all objects in DocuXplorer will inherit the users, groups and permissions of its parent. The Library object is the highest level object in DocuXplorer. Any object created within the Library will, by default, inherit its properties. Administrators can change the properties of the Library's child objects and stop inheritance of its properties. Administrators can give permissions to specific users or groups to modify permissions for an object.

DOCUXPLORER

Save & Close **Context Help...**

Main

Properties

- General
- Library
- Drawer
- Folder
- Index Set Search
- Document Content Search
- Workflow Actions
- Permissions

Permissions

User/Groups:

Accounting

Add

Delete

Select Permission Level for all objects: **Read Write**

Display permissions by object: **Show All Objects**

Library Permissions

Create Cabinets	☐
Connect Cabinets	☐
Library Event Log Visible	☑

Index Sets

Create New Index Sets	☐

Find Document

Print Document List View	☐
Export Document List View	☐
Modify Folder Item Properties	☑
Modify Permissions	☐

Cabinet Permissions

Cabinet Visible	☑
Create Drawers	☐
Delete Cabinet	☐
Rename Cabinet	☐
Connect Drawers	☐
Disconnect Cabinets	☐
Modify Folder Item Properties	☑
Modify Permissions	☐

Drawer Permissions

Drawer Visible	☑
Create Folder/Folder Structure	☑
Delete Drawers	☐
Rename Drawer	☐
Copy Folder Structures	☐
Disconnect Drawers	☐
Modify Folder Item Properties	☐
Modify Permissions	☐

Folder Permissions

Folder Visible	☑
Create Folder/Folder Structure	☑
Delete Folders	☑
Modify Folder Item Properties	☑
Export Document List View	☑
Print Document List View	☑
Add Documents	☑

The Library Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete [users](#) and [groups](#).

[Select Permission Level](#) **for all objects** - this field allows the use of preset permission levels. Preset Permission Levels can also be used as a starting point for creating [Custom Permission Sets](#).

Display permissions by object - allows an administrator to view permissions either by a specific object or for all objects at the same time.

Library Permissions - the permissions that can be set for the Library Object

Create Cabinet - if checked allows a user or group to [create](#) new Cabinets in the Library

Connect Cabinet - if checked allows users or groups to [Connect](#) to disconnected Cabinets

Library Event Log Visible - allows the users or groups to view the [Library Event Log](#)

Index Sets

Create Index Sets - allows users and groups to [create](#) Index Sets

Find Document

Print Document List View - if checked, allows a user to select the [Print the Document List View](#) within the Find Document dialog box. -

Export Document List View- if checked, allows the user to [Export Document List View](#) within the Find Document dialog box.

Modify Folder Properties - allows users and groups to modify Folder properties

Modify Permissions - Allows specified users or groups to modify security permission properties

Tip:

- Users and groups who have been permission to create Index Sets will also need permission to Modify Index Sets. Permission to Modify Index Sets can be set in the [Manage Index Set Properties dialog](#).
- When Users/Groups are added or a change is made to permissions they do not take effect until the Library or specific Cabinet is closed

and reopened at a workstation. When changes are made we recommend that administrators instruct all users to close DocuXplorer on their desktops and reopen.

Cabinet Permissions
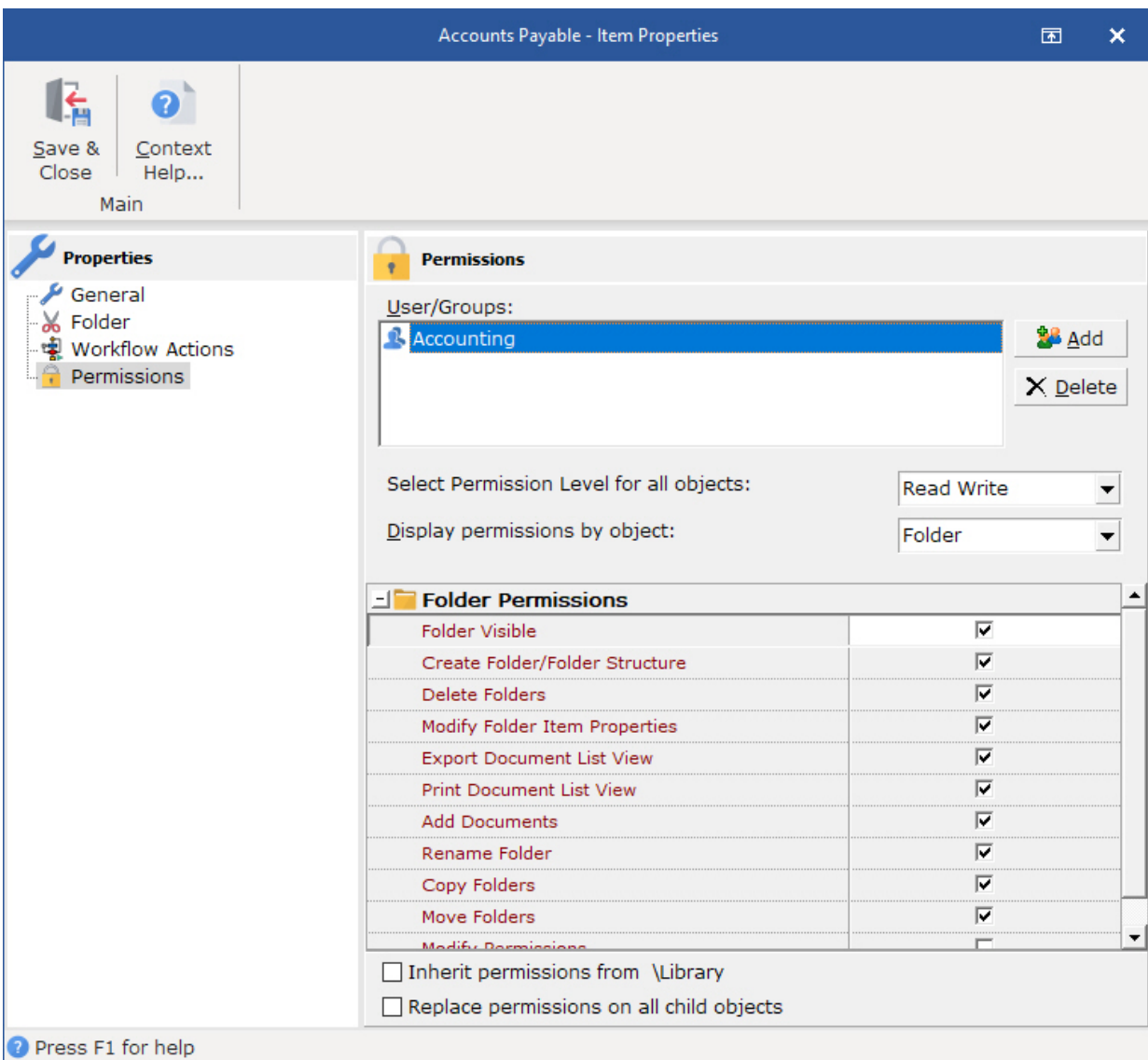
This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

Administrators will use the Cabinet Permissions Item located by right clicking the Cabinet and selecting Cabinet Properties, to add or delete Users and Groups and set permissions.

Each DocuXplorer object has its own set of properties and permissions. By default, an object's properties: users, groups and permissions are inherited from its parent object. Before making any changes to an object's permission properties an administrator must shut off inheritance by removing the check from the" Inherit permissions from parent" box. To propagate the changes to any child objects of the object being changed the administrator must place a check in the "Replace permissions on all child objects" box.

Tip:

- If you have already customized a child object by making changes to an object below the parent object the "Replace permissions on child objects" will overwrite those customized settings.
- Security effects of Adding new Users/Groups or change permissions will not be realized until the affected Library or Cabinet is reopened at a workstation.

Permissions

User/Groups:

- Accounting
- Marketing

Add

Delete

Select Permission Level for all objects: Read Write ▼

Display permissions by object: Show All Objects ▼

Cabinet Permissions	
Cabinet Visible	☑
Create Drawers	☐
Delete Cabinet	☐
Rename Cabinet	☐
Connect Drawers	☐
Disconnect Cabinets	☐
Modify Folder Item Properties	☑
Modify Permissions	☐

Drawer Permissions	
Drawer Visible	☑
Create Folder/Folder Structure	☑
Delete Drawers	☐
Rename Drawer	☐
Copy Folder Structures	☐
Disconnect Drawers	☐
Modify Folder Item Properties	☐
Modify Permissions	☐

Folder Permissions	
Folder Visible	☑
Create Folder/Folder Structure	☑
Delete Folders	☑
Modify Folder Item Properties	☑
Export Document List View	☑
Print Document List View	☑
Add Documents	☑
Rename Folder	☑
Copy Folders	☑
Move Folders	☑
Modify Permissions	☐

Document Permissions	
Document Visible	☑
Modify Document Index Data	☑
Modify Document Image	☑
Delete Documents	☑
Modify Document Item Properties	☑

☐ Inherit permissions from \Library

☐ Replace permissions on all child objects

Save & Close   Context Help...

Main

Properties

- General
- Cabinet
- Folder
- Index Set Search
- Workflow Actions
- Permissions

My Business - Item Properties

? Press F1 for help

The Cabinet Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete <u>users</u> and <u>groups</u> for the Cabinet.

<u>Select Permission Level</u> **for all objects** - this field allows the use of preset permission levels. Preset Permission Levels can also be used as a starting point for creating <u>Custom Permission Sets</u>.

Display permissions by object - allows an administrator to view permissions either by a specific object or for all child objects of the object being set.

Cabinet Permissions - the permissions that can be set for the Cabinet Object

> **Cabinet Visible** - if checked Cabinet will be visible to that user or group. Leaving the box unchecked will make the Cabinet and its contents invisible to those users.
>
> **Create Drawers** - if checked allows a user or group to <u>create</u> new Drawer in the Cabinet.
>
> **Delete Cabinet** - if checked allows a user or group to <u>delete Cabinet</u> from a Library.
>
> **Rename Cabinet** - if checked allows a user or group to <u>rename a Cabinet</u>.
>
> **Connect Drawers** - if checked allows users or groups to <u>Connect</u> to disconnected Drawers.
>
> **Disconnect Cabinets** - if checked allows users or groups to <u>disconnect the Cabinet</u>.
>
> **Modify Folder Properties** - if checked allows users or groups to modify folder properties including Default Index Set.
>
> **Modify Permissions** - Allows specified users or groups to modify security permission properties

Inherit permissions from parent - if checked the object <u>inherits</u> permissions from its parent. To change permissions for a object uncheck this box.

Replace permissions on all child objects - if checked DocuXplorer will overwrite permissions on all objects below the parent object.

Tip:

When Users/Groups are added or a change is made to permissions they do not take effect until the Library or specific Cabinet is closed and reopened at a

workstation. When changes are made we recommend that administrators instruct all users to close DocuXplorer on their desktops and reopen.

Drawer Permissions

This Help topic refers to the following editions:
☑ Professional ☑ Enterprise

Administrators will use the Drawer Permissions Item located by right clicking the Drawer and selecting Drawer Properties, to add or delete Users and Groups and set permissions.

Each DocuXplorer object has its own set of properties and permissions. By default, an object's properties: users, groups and permissions are inherited from its parent object. Before making any changes to an object's permission properties an administrator must shut off inheritance by removing the check from the" Inherit permissions from parent" box. To propagate the changes to any child objects of the object being changed the administrator must place a check in the "Replace permissions on all child objects" box.

Tip:

- If you have already customized a child object by making changes to an object below the parent object the "Replace permissions on child objects" will overwrite those customized settings.
- Security effects of Adding new Users/Groups or change permissions will not be realized until the affected Library or Cabinet is reopened at a workstation.

The Drawer Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete [users](#) and [groups](#) for the Drawer.

[Select Permission Level](#) **for all objects** - this field allows the use of preset permission levels. Preset Permission Levels can also be used as a starting point for creating [Custom Permission Sets](#).

Display permissions by object - allows an administrator to view permissions either by a specific object or for all child objects of the object whose permissions are being set.

Drawer Permissions - the permissions that can be set for the Drawer Object

> Drawer Visible - if checked the Drawer will be visible to that user or group. Leaving the box unchecked will make the Drawer and it contents invisible to those users.

> Create Folder - if checked allows a user or group to [create](#) new Folders in the Drawers.

> Delete Drawers - if checked allows a user or group to delete a Drawer from a Cabinet.

> Rename Drawer - if checked allows a user or group to rename a Drawer.

> Copy Folder Structure - if checked allows a user or group to [copy the Folder Structure](#) and its properties to another Drawer.

> Disconnect Drawers - if checked allows users or groups to disconnect the Drawers.

> Modify Folder Properties - if checked allows users or groups to modify folder properties including Default Index Set.

> Modify Permissions Properties - Allows specified users or groups to modify security permission properties

Inherit permissions from parent - if checked the object [inherits](#) permissions from its parent. To change permissions for the object uncheck this box.

Replace permissions on all child objects - if checked DocuXplorer will overwrite permissions on all objects below the parent object.

Tip:

When Users/Groups are added or a change is made to permissions they do not take effect until the Library or specific Cabinet is closed and reopened at a workstation. When changes are made we recommend that administrators instruct all users to close DocuXplorer on their desktops and reopen.

Folder Permissions

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

Administrators will use the Folder Permissions Item located by right clicking the Folder and selecting Folder Properties, to add or delete Users and Groups and set permissions.

Each DocuXplorer object has its own set of properties and permissions. By default, an object's properties: users, groups and permissions are inherited from its parent object. Before making any changes to an object's permission properties an administrator must shut off inheritance by removing the check from the" Inherit permissions from parent" box. To propagate the changes to any child objects of the object being changed the administrator must place a check in the "Replace permissions on all child objects" box.

Tip:

- If you have already customized a child object by making changes to an object below the parent object the "Replace permissions on child objects" will overwrite those customized settings.
- Security effects of Adding new Users/Groups or change permissions will not be realized until the affected Library or Cabinet is reopened at a workstation.

The Folder Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete <u>users</u> and <u>groups</u> for the Folder.

<u>Select Permission Level</u> **for all objects** - this field allows the use of preset permission levels. Preset Permission Levels can also be used as a starting point for creating <u>Custom Permission Sets.</u>

Display permissions by object - allows an administrator to view permissions either by a specific object or for all objects at the same time.

Folder Permissions - the permissions that can be set for the Folder Object

Folder Visible - if checked Folder will be visible to that user or group. Leaving the box unchecked will make the Folder and its contents invisible to those users.

Create Folder/Folder Structure - if checked allows a user or group to create new Sub-Folders in the Folders.

Delete Folders - if checked allows a user or group to delete a Folder.

Modify Folder Properties - if checked allows a user to modify folder properties including Default Index Set.

Export Document List View - if checked allows the user to Export Display to a xls, html, xml, or csv

Print Document List View - if checked allows the user to select Print Display

Add Document - if checked allows a user or group to add documents to a Folder.

Rename Folder - if checked allows a user or group to rename a Folder.

Copy folder - if checked allows a user or group to copy Folders.

Move Folder - if checked allows a user or group to move Folders.

Modify Permissions - Allows specified users or groups to modify security permission properties

Inherit permissions from parent - if checked the object inherits permissions from its parent. To change permissions for an object uncheck this box.

Replace permissions on all child objects - if checked DocuXplorer will overwrite permissions on all objects below the parent object.

Tip:

When Users/Groups are added or a change is made to permissions they do not take effect until the Library or specific Cabinet is closed and reopened at a workstation. When changes are made we recommend that administrators instruct all users to close DocuXplorer on their desktops and reopen.

Find Document Permissions

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

Administrators will use the Find Document Permissions Item by opening Find Document and selecting File, Permissions, to add or delete Users and Groups and set permissions.

Find Document Permissions - are the permissions that can be set for the Document View List in the Find Document List View.

Since documents can be located across Folders and Documents within a Cabinet, security for Print Document List View and Export Document List View for individual folders cannot be enforced. Therefore, these security options are placed at the Find Document, Document List View level.

Print Document List View - if checked, allows a user to print the Document List View.

Export Document List View - if checked, allows a user to export the Document List View.

Modify Permissions Properties - allows specified users or groups to modify security permissions properties.

Index Set and Index Field Security

This Help topic refers to the following editions:

☑ Professional ☑ Enterprise

Index Set Security

To set up Index Set security administrators will use the Index Set Permissions Item located by selecting the Index Tools Menu and clicking Manage. Highlight the Index Set to be worked with and right-click to bring up a menu, then select Index Set Properties to add or delete Users and Groups and set permissions for the Index Set.

Tip:

- Default Index Set permissions are set at the Library.
- A new Index Set will inherit the permissions set for its template. If the new Index Set's permissions are changed it will become a parent object and any Index Sets created from it as a template will inherit the new permission set.

Important:

Each Index Set has its own set of properties and permissions. By default an Index Set's properties: users, groups and permissions are set to the Library default. When creating an Index Set administrators can add or delete users and groups and modify their permissions.
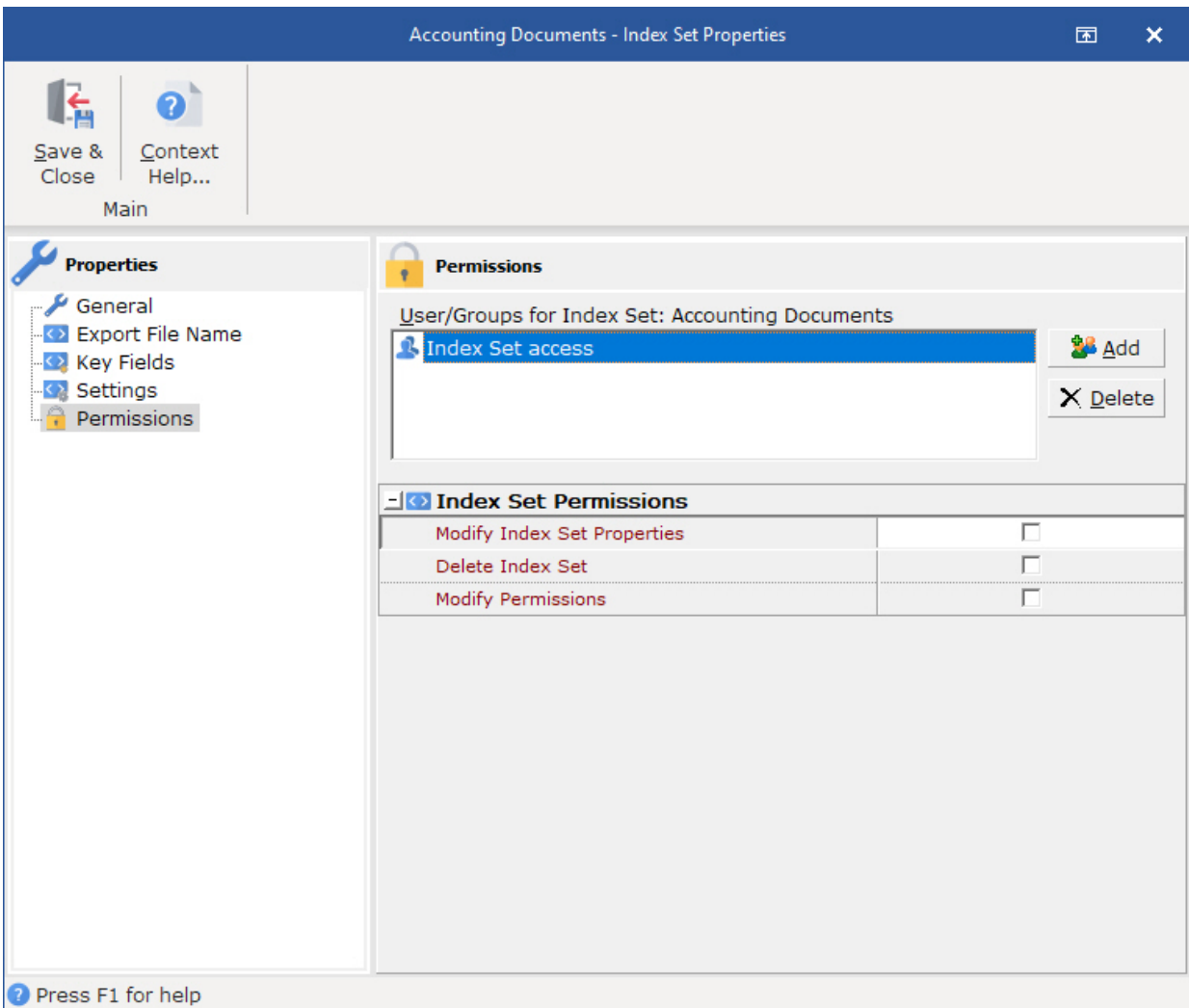
The Index Set Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete <u>users</u> and <u>groups</u> for the Index Set.

Index Set Permissions - permissions that can be set for the Index Set

Modify Index Set - if checked allows the user or group to make <u>modifications to the Index Set</u> and <u>Index Field Properties</u>

Delete Index Set - if checked allows a user or group to delete the Index Set.

Modify Permissions Properties - Allows specified users or groups to modify security permission properties

Tip:

Users and groups who have been given permission to create Index Sets will also need permission to Modify Index Sets. Permission to Modify Index Sets can be set in the Manage Index Set Properties dialog.

Index Field Security

To set up Index Field security right-click the Index Field to work with and select Properties/Permissions.
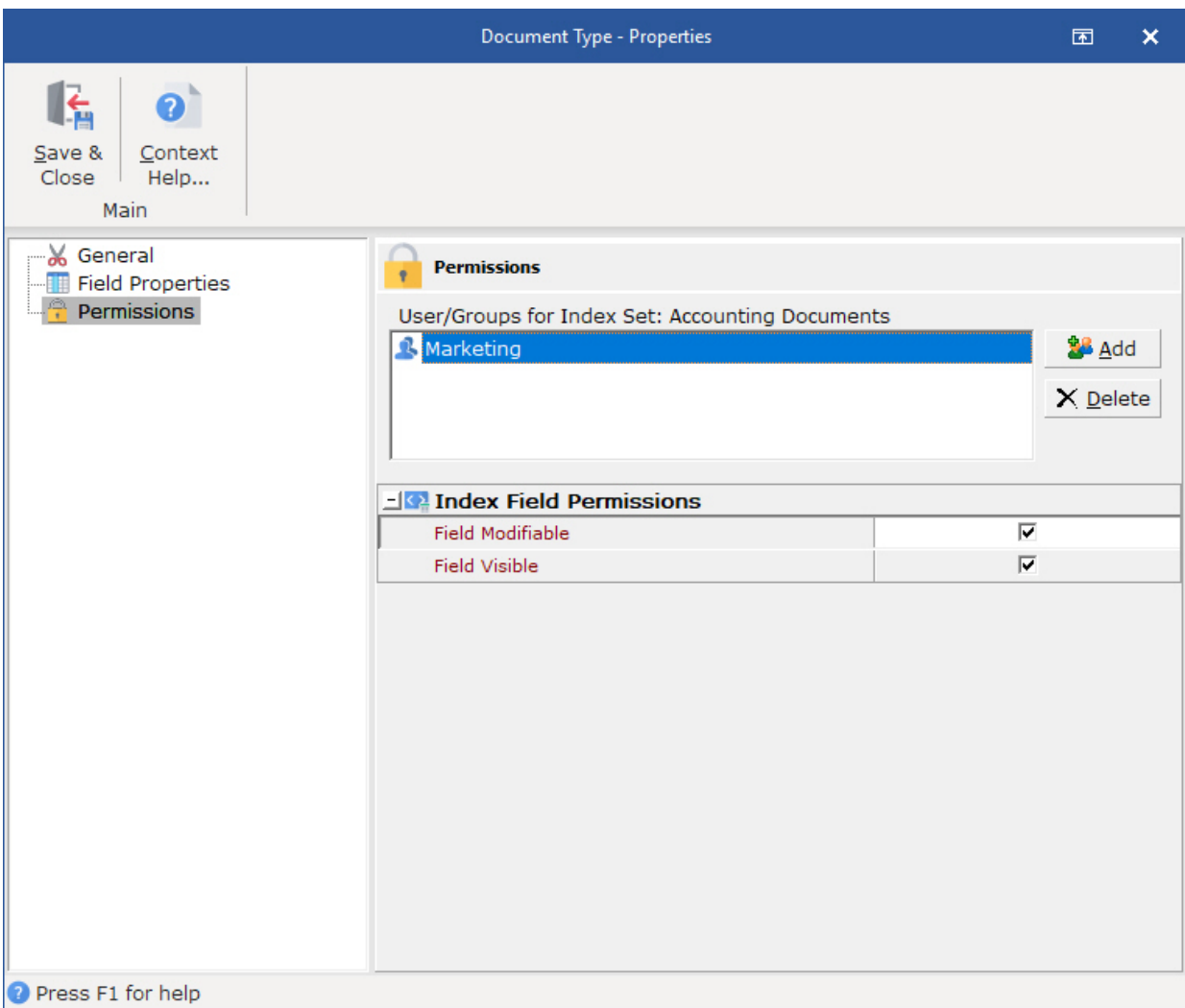
The Index Field Properties/Permissions dialog box consists of:

Users/Groups dialog - in this area an administrator can add and delete users and groups for the Index Set.

By default an Index Field will inherit Users and Groups from it's parent Index Set.

Index Field Permissions - permissions that can be set for the Index Field

    Field Modifiable - if checked allows the field value to be modified by the assigned users and groups.

    Field Visible - if checked allows the assigned users and groups to see the field in the Index Set.

Tip:

The Field Modifiable property allows administrators to deny to users and groups the ability to modify the value of a specific field. With this function DocuXplorer provides administrators with the ability select specific fields that can not be modified as opposed to the Document property that denies the ability to edit any index value associated with a document.

Use the Field Visible property to hide any confidential index data associated with a document. The Field Visible property will allow only those users with this permission to see the hidden index data when viewing a document

Tip:

When Users/Groups are added or a change is made to permissions they do not take effect until the Library or specific Cabinet is closed and reopened at a workstation. When changes are made we recommend that administrators instruct all users to close DocuXplorer on their desktops and reopen.

Finding a Document

About the DocuXplorer Search Engine

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer allows users to create sophisticated Query Results Lists with subsets of documents stored in any folder of a Cabinet. These Query Results Lists use the index data and full content indexed data that have been associated to each document to provide lists of documents that reflect that query.

To find a document or set of documents in DocuXplorer use the DocuXplorer Find dialog. There are three methods of searching for a document or group of documents are:

Full Text Search

Search by Field

SQL Execution

click the links to see complete information on each method of search.

Note:

A search cannot be performed against the entire Library (all documents in the Library) at the same time. The highest level of a search is the Cabinet level. Store all documents you would want to search for together in the same Cabinet. If you want to search through all your documents at the same time you would create a single Cabinet with many Drawers. If you are storing multiple types of documents (HR, AP, Client, etc.) you would create a Cabinet for each document type.

Documents can be cut or copied from the Query Results List and pasted into a DocuXplorer Folder. Documents can also be dragged and dropped to a folder in the same Cabinet.

Document searches can be saved as Saved Search Documents for reuse either inside DocuXplorer or from a user Desktop or as an attachment to an email.

Full Text Search

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Available from the Full Text Search Tab, Full Text Search provides users with the ability to search for a word or phrase in any index field or memo notes, OCR text and, if selected, the full text of a document's content.

Users can save searches as documents to be reused at any time. These saved searches are valuable as workflows and can be saved as documents in DocuXplorer and exported to a users desktop or attached to an email.

Users may also save searches as .dx files directly to a hard drive or import them directly from a hard drive using the File Menu items Export Find Document Criteria and Import Find Document Criteria. Export Find Document Criteria will open a dialog box for you to locate a .dx file on a hard drive. Import Find Document Criteria will open a dialog box allowing you to locate the .dx file with the search criteria you wish to run. These menu items are only available when the search criteria is in focus (highlighted).

Select the default Index Set to be used when displaying a full text query results list.

Tip:

This feature is valuable when you know which Index Set your document is associated with.

For users who have only a single Index Set invoke this default so that all results lists will be displayed in the correct Index Set.

To search the full text of a document's content check the box next to the item "Include document content in search"

Tip:

- Document content indexing must be enabled before a full text search of an electronic document's content can be performed. Document content indexing is enabled as a property of a Drawer.

- Documents from Microsoft Office 2007 products that are saved in .docx or .xlsx format can be saved to DocuXplorer but cannot be full content searched. In Office 2007 change the Save options to default to Word or Excel 97-2003 format which will be indexed when Content Searches are enabled.

The search conditions used for full text searches are character strings composed of words, phrases, logical operators, and parentheses for grouping priority.

Aside from white space characters, which are considered to be delimiters in search strings, special characters include the double quote "" used for delimiting phrases, the asterisk * used for prefix, postfix, and substring matching, and parentheses (). The reserved words include the logical operators OR, AND, NOT, NEAR.

The priority of the logical operators from lowest to highest is OR, AND, NOT, NEAR.

You can use parentheses to change the priority grouping.

For example, the query 'Smith and Invoice or Receipt' finds documents that have both the words "Smith" and "Invoice" or the word "Receipt". Changing the priority with parentheses to 'Smith and (Invoice or Receipt)' causes the query to find documents that have the word "Smith" and either of the words "Invoice" or "Receipt".

The logical OR operator produces a "true" result when either query value is true.

The logical AND operator produces a true result only when both of its query values are true.

The logical NOT operator produces a true result when its query value is not found.

The NEAR operator (proximity operator) is similar to the AND operator in that both of its query values must be found. In addition, it requires that its query values be within a certain physical distance of each other for it to return a true result. The default distance for the NEAR operator is 8 words. To use a proximity value other than the default, specify the distance as a parameter to the NEAR operator.

For example ' medical near(15) doctor' will evaluate to true for records where the word "medical" is within 15 words of "doctor".

Search words that do not have logical operators specified are assumed to have an implied AND operator between them.

For example, the following two search conditions are equivalent: 'mechanical engineer' 'mechanical AND engineer' And the following two are equivalent: 'computer programmer or software developer' '(computer AND programmer) OR (software AND developer)'

Wild Card Searches

Individual search words that are not enclosed in double quotes can be searched for as exact matches, prefix matches, postfix matches, or substring matches. This behavior is controlled through the use of the asterisk (*) character.

* Exact match.

Simply specify the word in the search condition. The word will be matched if it is found exactly as given in the text.

For example, the search word "special" will match only "special" in the text (or upper case versions if it is not a case sensitive index).

* Prefix match.

Place an asterisk at the end of the word to match all words that begin with the given characters.

For example, the search word " special*" will match "special", "specialty", "specialization", etc.

* Postfix match.

Place an asterisk at the beginning of the word to match all words that end with the given characters.

For example, the search word "* ation" will match words "station", "specialization", "citation", etc.

* Substring match.

Place an asterisk at both the beginning and end of the word to match all words that contain the given characters.

For example, the search word "* lock*" will match the words "locker", " antilock", "blocking", etc.

Tip:

Exact matches and prefix matches provide the best performance. Both postfix and substring matches require that the entire Full Text Search (FTS) index be scanned in order to satisfy the search.

Quotes and Spaces

Double quotes are used as phrase delimiters. In addition, special characters can be enclosed inside double quotes to ensure that they are unchanged by the Search Engine.

For example, to search for a parenthesis, it is necessary to enclose it in double quotes in order to keep it from being treated as a precedence operator in the search condition itself. To search for a physical double quote, use two of them in a row.

Single quotes are not treated as a special case by the Search Engine.

Spaces are considered to be delimiters in search conditions. If you have a special situation in which spaces are not delimiters in the text and are part of search words, then it may be necessary to enclose the search words in double quotes in order to preserve the spaces.

Multi-word phrases

Multi-word phrases in queries match identical phrases in the text being searched.

For example, the search condition ' "alpine skiing"' will match only records that have the exact words "alpine" and "skiing" in that order in the text with no other non-noise words between them.

If you use the NEAR operator with sub-expressions, you may need to use the optional form of the operator with the parentheses after it to avoid ambiguity in the expression.

For example, the condition "a near (b and c)" is not valid because the left parenthesis is interpreted as the opening of the NEAR proximity parameter. The query would need to be written as "a near() (b and c)". The empty parentheses after the NEAR operator removes the ambiguity; because they are empty, the default proximity value is used. You can also specify a proximity value: "a near(25) (b and c)".

Tip:

- The highest level of the hierarchy that can be searched in DocuXplorer is the Cabinet. If you know which Drawer or Folder the document is located in you can further refine the search. Refining the search will result in fewer false document hits.

- When creating a DocuXplorer Library place documents that are similar and relate to the same subject (i.e. Client Documents) in the same Cabinet as index information is held at the Cabinet level. The Cabinet would then contain all documents that you would need to search through in a single search.

- [To full text search a PDF document it must have first gone through the Extract Text process](#)

- If the document is in a binary format such as a media file or graphic file, the file information is ignored by the indexing engine unless the document has been OCR'd in DocuXplorer.

Search by Field

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal

Located in the Search Engine Find dialog reached by clicking on the Find Document button on the Icon Toolbar, Search by Field allows you to create sophisticated queries using either individual or grouped and/or statements for a precise result across all documents in a Cabinet.

Users may also save searches as .dx files directly to a hard drive or import them directly from a hard drive using the File Menu items Export Find Document Criteria and Import Find Document Criteria. Export Find Document Criteria will open a dialog box for you to locate a .dx file on a hard drive. Import Find Document Criteria will open a dialog box allowing you to locate the .dx file with the search criteria you wish to run. These menu items are only available when the search criteria is in focus (highlighted).

When adding search criteria to a Search by Field query you can either insert a new row above the present criteria row or append a new row at the bottom of the grid by selecting the appropriate icon. Rollover the icons to see a pop-up description of the icon's purpose.

Note:

These icons will only appear when your cursor is being used in the grid to create your query.

To search for a document or set of documents by fields or groups of fields:

Entering criteria and values manually:
- From the toolbar click Find Document
- Change the Cabinet to search, if needed
- Select the Search by Fields tab
- Enter a value to determine search order, if needed
- If creating multiple groups as part of a complex search enter the "Open Parentheses" when you have an "or" statement consisting of two or more values where the result will be combined with and followed by an "And" statement. Make sure to close a parentheses in creating a group.
- Select a Index Set from the drop down list
- Select a Field from the drop down list
- Select criteria from the drop down list
- Type in a value, word or phrase to search for
- To add additional information to the query select And/Or
- Select the icon on the Toolbar to either insert a row above the present row or append a row at the bottom of the grid
- Repeat the same steps for line two of the query, etc.
- Click Find Now

Auto Indexing Variables

Auto Indexing Variables can be used in place of static text when search for documents. The tool bar button {Var} allows you enter Auto Indexing Variable values for dates and other field types. For example if you want to have a save search that would always look for documents less than today's date you would set the Field Name to Created, set the Criteria to "Less then" press the {Var} button then type in the Auto Indexing variable {Today} in the "To Locate this Value" column. Se example above. Click on this link for more information on Auto Index Variables.

And/Or Drop Down Criteria Field

Use the "And" or "Or" selection to have the search select the document using the criteria in the current row and/or the criteria in the row immediately below it to locate the document or documents in a query result list.

The "And" selection will affect the criteria just before it and just after it and takes precedence over the "Or" selection

To create multiple groups as part of a complex search using "And/Or" statements; create your statements as described previously with the following differences:

- Use the "Open Parentheses" when you have an "or" statement consisting of two or more values where the result will be combined with and followed by an "And" statement. Make sure to close a parentheses in creating a group. See the example below.

Example: Let's say you have fields in an Index Set named "Client Name" and "Document Type". You want to find all records that have a Client Name of "Max Able" or contains the Client Name "John Adams" and also contains a Document Type of "Trade Confirmation". Your query would look as follows;

Notice the use of parentheses to enclose the "or" statement. If the parentheses were left out, the result would be "all documents" for "Max Able" and only "Trade documents" for "John Adams". The "And" criteria would only be relevant to the item above it. By using the parentheses you are able to create a statement that creates a result. The "And" criteria is then relevant to the result of the "Or" statement.

Enter criteria and values from a Saved Search (not available in DocuXplorer Personal)

- In the Library Tree select the .Saved Searches Folder and double click the Saved Search Document containing the desired search criteria.
- Saved search criteria will be automatically populated.
- Saved search criteria can be changed and re-saved as a new Saved Search Document.

To Save a Search as a document see Saving A Search.

Tip:

- There is no limit to the number of lines of criteria that can be created.

- When creating a query on a check box it is important to remember that a check box exists in 3 states. See the item <u>Working with Index Sets | Index Set Fields | Check Box Field</u> for more information.

SQL Search

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

Allows administrative users familiar with SQL language to write an SQL string to search the database.

This feature is only available to administrators.
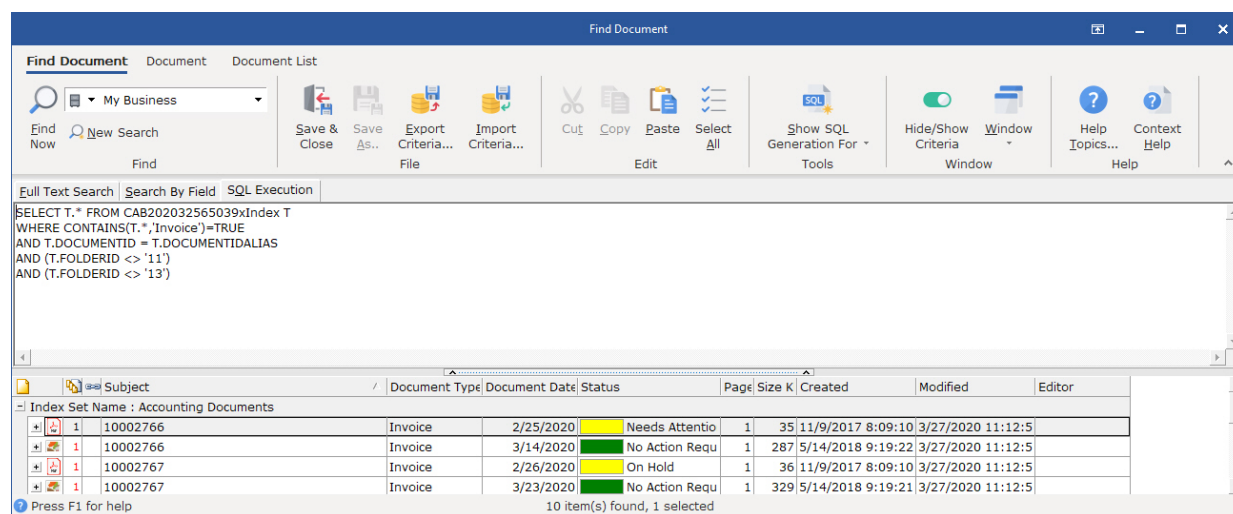
To populate SQL Execution dialog:
- Create either a Full Text or Search by Field Query
- Click on the SQL Execution Tab of the Find Document dialog
- Select View from Menu Bar
- Select the type of search to generate the SQL statement

Index Search

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Search for documents using the values in any index fields or any combination of index fields. Index searching can be accessed through the Find dialog in the Full Text Search or Search by Field tab.

Query Results List

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

- A query results list is produced by a document query using the [Find dialog of the DocuXplorer Search Engine](#).
- Documents in a query results list have all the functionality of a [Document List View](#) with the ability to convert, merge, copy, move, send to, or delete documents .
- Documents from a Query Results List can be dragged and dropped to a folder in the same Cabinet.
- If your query requires access to multiple Index Sets the results will be displayed with the All Documents Index Set.
- Users can change the query list display using the [Folder Index Set Filter](#).
- User can [export](#) a Query Results List in CSV, XML Excel or HTML format.
- Using the Print Report command a user can create printable reports from the Query Results List

Tip:

- In a Query List View a user cannot modify index data when the Content Search box has been checked using the [F2 key edit function](#).
- Print or Export Display in the Query List View is an administrator only function.

Internet Connect

Connecting via the Internet

This Help topic refers to the following editions:
☑ Enterprise

It is recommended that connecting to DocuXplorer from remote locations be accomplished using Terminal Services or Citrix. These methods provide the fastest display of documents to remote users.

DocuXplorer Enterprise can be connected to a Library located at a different location via the Internet. Users must be sure that all system requirements are met and that the server is configured properly. The setup should be handled by an experienced IT professional familiar with Internet technology such as networks, routers, ports and IP Addresses. If you do not have any experience with this technology it is advised that you contact your local reseller or DocuXplorer Tech Support to set up an appointment for a support technician to walk you through this process. Fees for assistance in setting up Internet Connections are charged at Level 2 Tech Support rates. [Please see our web site Online Store for details about Level 2 Tech Support rates](#).

System Requirements:
- Network Server running Windows Server 2000 or higher
- DocuXplorer Enterprise Installation with the Library and Advantage Database Server located on the Network Server
- DocuXplorer Enterprise Client installed on the laptop or remote desktop computer to connect via the Internet

To set up DocuXplorer to access via the Internet first set up your DocuXplorer Library. The following Library defaults and Security set ups are required to access via the Internet :

- [Set up Users and Groups](#) in <Tools><Options><Users and Group>. For Users who will access via the Internet check the Allow Internet Access check box
- [Apply Security](#) by right clicking on the Library icon and selecting <Properties><Permissions>
- [Set Login Required](#) in <Tools><Options><Library>
- [Enable Internet Access](#) in <Tools><Options><Library>

The Advantage Database Server must next be configured to allow for Internet connectivity.
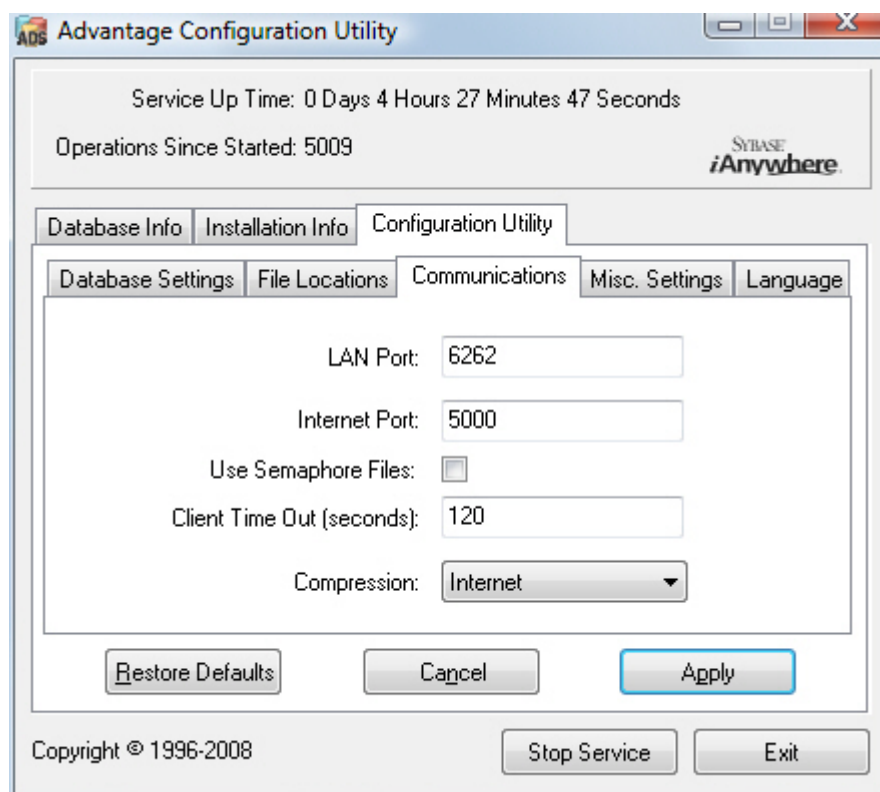
To set up the server for Internet connectivity for Windows 2003 or better:

Configuring the Router to allow access to the Internet:
- The router's port (recommended 5000) should be open and redirected to the DX Library Server (see your router instructions for network configuration). If you need to assign a different port to the Advantage Database Server move to the next step. If the Internet port is set to zero, Internet access to the Advantage Database Server is disabled.

Configuring the Advantage Database Configuration Utility to allow access from the Internet:
- The port used by DocuXplorer to connect to the Internet can be changed on the Advantage Database Server
- Open the item <Start><Programs><Advantage Database Server><ADS Configuration Utility>
- Select the <Configuration Utility><Communications>: Tab
- Set the Internet Port to the same port set at the router (recommended is 5000)
- To be initialized you need to stop and restart the "Advantage Database Service" - click Stop Service

- When the Start Service button appears click to Start Service
- Click Apply and Exit to save your changes

After configuring the server to access an open port you will need to set up the DocuXplorer Library to allow access via the Internet.

For NetWare 5.x Users:
- Open the ADS.CFG file in a text editor.
- Look for the INTERNET_PORT option. The port number is the decimal value of the port you want to listen to.
- Save the file.
- Re-load the Advantage Database Server NLM.

For Linux:
- Open the ads.conf file in a text editor.
- Look for the INTERNET_PORT option. The port number is the decimal value of the port you want to listen to.
- Save the file.
- Kill and restart the ADS daemon.

To complete the Library set up to connect with workstations at remote locations via the Internet:

On your Remote Workstation:
- Open DocuXplorer as the Administrator
- Click <File><Connect/Create Library>
- Click the <Properties> tab.
- Check the Internet box and expand the Internet item by clicking on the [+] sign.

- Type in the Server Name and DocuXplorer populate the Server IP Address or type in the Server IP Address
- Make sure the port setting is set as at the router
- Validate Connection Path should be unchecked.
- Make sure the Connection Path is pointing to \\servername\DXDocs\DXLibrary just as it is for all other workstations that access the Library in your office
- Click <Test Connection>

Tip:

If the connection test fails there is possibly an issue with your firewall.

MS Office Integration

Microsoft Office Integration Overview

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

DocuXplorer allows users to add Microsoft Office documents directly to the DocuXplorer Library from a toolbar in most Microsoft Office programs. Users can save Outlook emails with their attachments, or Word, Excel, Project, and PowerPoint files directly to a DocuXplorer folder. Documents are stored in their original file format and can be exported or attached to an email as Microsoft Office files. Users can also use the same toolbar to find documents stored in DocuXplorer directly from Microsoft Office programs.

Tip:

- Office Integration will work with any Office version, 2000 or later.
- Office products that integrate with DocuXplorer include: Word, Excel, PowerPoint and Outlook.

Installing the MS Office Integration

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

To install the DocuXplorer integration with Microsoft Office from within DocuXplorer:

- Make sure you have the following two files in the same folder as the DocuXplorer executable file

- DXMSOffice.dll

- secman.dll

- Close all Microsoft Office applications.

- In DocuXplorer, go to <Tools><Options><MS Office Defaults> and check Register and click Save and Close
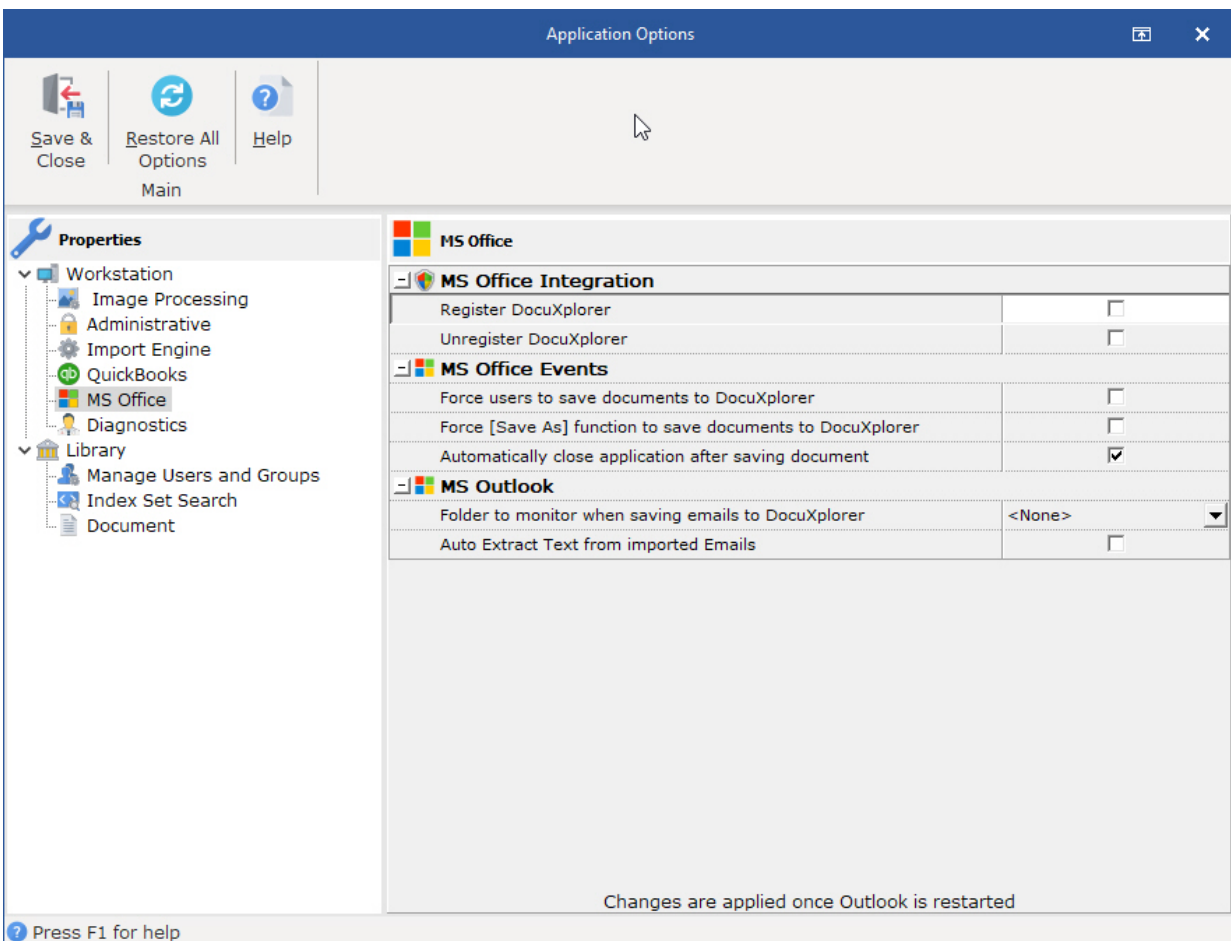
- Click OK on the next two dialogs that appear they inform that the registration of the DXMSOffice.dll and secman.dll have succeeded.
- Click OK on the dialog that informs you that MS Office applications can be restarted.

To uninstall the MS Office integration from DocuXplorer:
- From <Tools><Options><MS Office Defaults> click Unregister.

The DocuXplorer Integration and Toolbar are COM Add-ins in MS Office applications. COM add-ins are executable (.EXE) files or Dynamic Link Library (.DLL) files that add extra functionality to Microsoft Office applications.

To install the DocuXplorer MS Office Toolbar from a Microsoft Office application:
- On the Tools menu, click Options, and then click the Other tab.
- Click Advanced Options, and then click COM Add-Ins.
- Do any of the following:
- To enable an add-in, select the check box next to the add-in.
- If the COM add-in you want is not listed, you need to add it to the Add-ins available list. Click Add, click the add-in (.EXE or .DLL file) you want, and then click OK.

To disable or uninstall a COM Add-in from a Microsoft Office application:
- To disable an add-in, clear the check box next to the add-in.
- To remove an add-in, clear the check box next to the add-in you want to remove, and then click Remove.

DocuXplorer - MS Office Toolbar

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

After installing the Office integration, DocuXplorer places a toolbar in Office applications that when clicked will automatically open DocuXplorer and allow users to save documents directly to a DocuXplorer folder or find documents stored in DocuXplorer using the DX search engine.
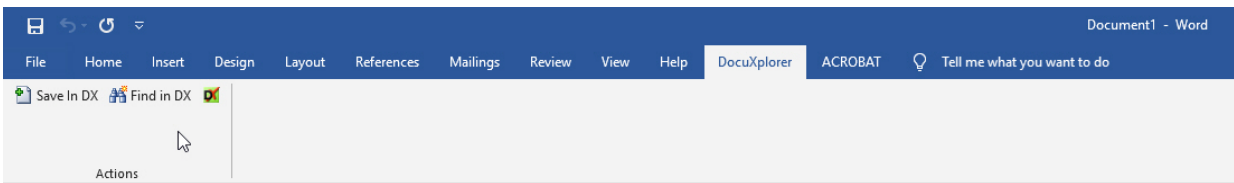
The toolbar has 3 buttons, they are:

- Save in DX - allows users to save Word, Excel or PowerPoint files or Outlook e-mail messages with their attachments directly to a DocuXplorer folder as indexed documents.

- Find in DX - automatically opens DocuXplorer and displays the Find dialog used to search for documents stored in DocuXplorer.

- DX Icon - display the DocuXplorer About Screen

Adding documents from an MS Office application

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Users can add MS Office documents directly from an Office application to a DocuXplorer folder using the DocuXplorer Office Toolbar.
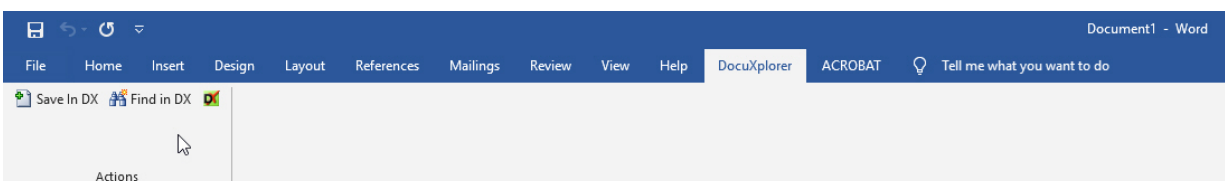
To add a document from Word, Excel, PowerPoint or Outlook:

- Click on the DocuXplorer Toolbar button "Save in DX".
- A DocuXplorer Folder Browse Screen will then allow a user to choose a DocuXplorer folder location to save the document
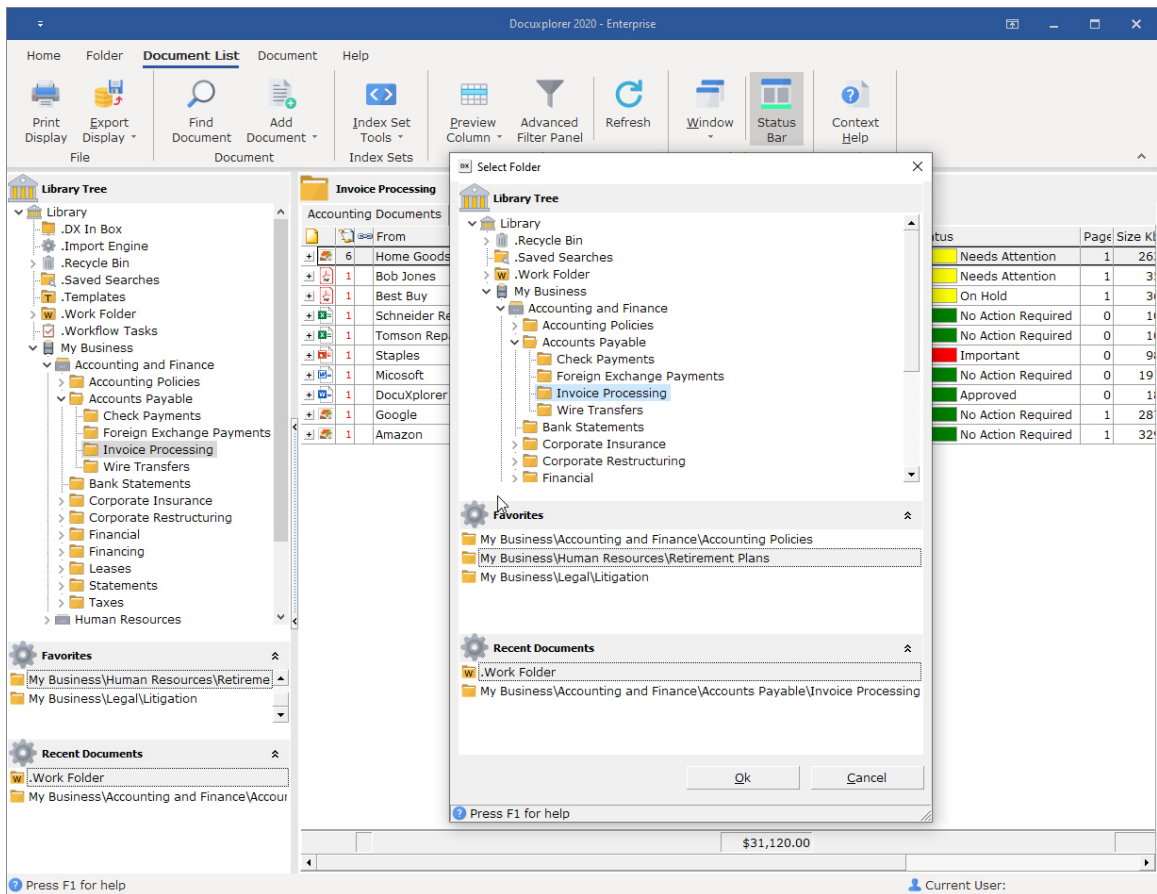
- The DocuXplorer Document Viewer will open allowing the user to index the document
- Save and Close the document to save to the selected folder.

Tip:

- Saving an email with an attachment from Outlook to DocuXplorer will save both the email and attachment as an .MSG file. When the email document is opened in DocuXplorer it will open in its native program, Outlook, the attachment will also open in its native program.

- When emails are added from Outlook an Enterprise or Professional user can automatically index the email document using the Outlook Auto-Indexing Variables of To, From and Subject by creating a field for each entry and using the proper auto-indexing variable.

- Documents saved from Word, Excel or PowerPoint directly to DocuXplorer remain temp files until they are added to DocuXplorer by clicking Save and Close. If you close the document without saving it to DocuXplorer the document created will be lost just as if you closed a document in Word, Excel or PowerPoint without saving it to your hard drive.

You can also set the DocuXplorer - MS Office integration to force users to save Office documents from Word, Excel or PowerPoint to DocuXplorer to better manage all your documents by having them centrally located and indexed for quick and easy retrieval.

When the "Force users to save in DocuXplorer" function is applied the <File><Save> menu item in Word, Excel, or PowerPoint applications will automatically open DocuXplorer and display a folder browse screen to select a location and open a New Document Window to create a new document in DocuXplorer. The same is true when the "Force Save As to save documents to DocuXplorer" is enabled the "Save As" function will force users to save documents in DocuXplorer.

Find a document from an MS Office application

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The DX Toolbar in either Word, Excel, PowerPoint or Outlook provide a <Find in DX> button that will automatically open DocuXplorer and display the DocuXplorer Find dialog allowing users to search for documents in the DocuXplorer Library.
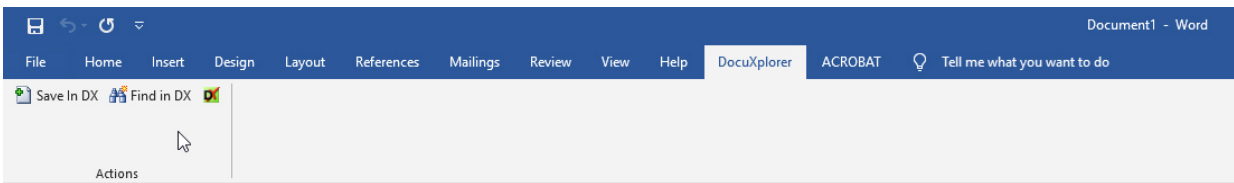
To find a document stored in the DocuXplorer Library:
- Click on the <Find in DX> button on the DX Toolbar.
- Enter a query in either the Full Text Search Window or Search by Field Window

QuickBooks Integration - Optional Add-in

DocuXplorer for QuickBooks Integration Utility Overview

This Help topic refers to all DocuXplorer versions only when the optional DocuXplorer for QuickBooks Integration package has been purchased and installed

DocuXplorer for QuickBooks Integration provides users the ability to automatically add, auto-index, and find documents while in QuickBooks from a QuickBooks menu item.

Many QuickBooks transactions have hard copy or electronic documents related, these documents need to be stored and retrieved from time to time at significant cost. Until now you have stored these paper documents in a folder, in a file cabinet and had to physically retrieve the documents to send to client or vendor. DocuXplorer can now provide you with the ability to store these documents electronically along with a QuickBooks transaction for instant access and the ability to communicate the documents to the concerned party. DocuXplorer's QuickBooks Integration makes it extremely easy to associate documents such as signed packing slips or customer purchase orders to a specific Invoice or other transaction and recall the packing slip, purchase order or other associated documents instantly when needed. The result is a significant reduction in time wasted searching for the associated paper document.

Users can also run DocuXplorer as a standalone product to manage all their business or personal documents.

DocuXplorer for QuickBooks Integration is accessed from the QuickBooks <File><DocuXplorer> menu item.
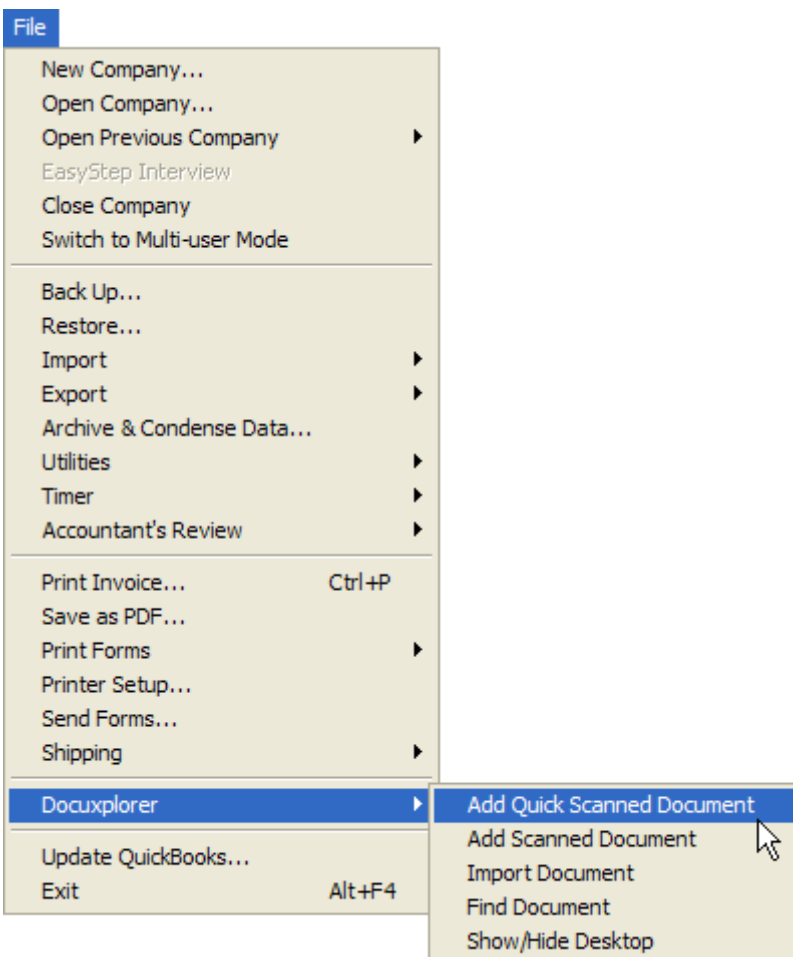
After creating a transaction entry in QuickBooks and saving it you can Add a scanned in document or Import an electronic document to a DocuXplorer folder with all the index information relating to that document automatically associated with the document.

The DocuXplorer for QuickBooks Integration uses the information you have entered in QuickBooks to create a company Cabinet with Drawers for each section of QuickBooks: Customer, Vendor, Employee, or Bank. Drawers are created automatically as the first document for that section is added. As you add a document, DocuXplorer will use the QuickBooks data to determine the Vendor, Employee, Bank or Client name and automatically create a folder in the proper Drawer for each when the first document is added for them. DocuXplorer then uses the QuickBooks transaction data to index the document. QuickBooks data used as index data might include Client or Vendor Name, Reference number, date of transaction and more. Retrieving the document then becomes as simple as selecting the transaction in QuickBooks and selecting

<File><DocuXplorer><Find> to bring up the DocuXplorer Query Results List displaying all the documents associated with the transaction.

Tip:

Do not change the names of any DocuXplorer for QuickBooks objects (Cabinet, Drawer, or Folder). If a label is changed DocuXplorer will create a new object with the original name and start adding documents to it.

Installing the DocuXplorer for QuickBooks Integration Utility

This Help topic refers to all DocuXplorer versions only when the optional QuickBooks Integration package has been purchased.

The DocuXplorer for QuickBooks Integration Utility is installed as part of the Complete or Personalize option during your install.

After the install completes, open DocuXplorer and create your Library.

To integrate DocuXplorer with QuickBooks you will need to:

1. Install the QuickBooks Add-in program
2. Register DocuXplorer with QuickBooks
3. [Import the DX-QB Index Sets](#) into your DocuXplorer Library
4. Integrate DocuXplorer into the QuickBooks menus

To install the QuickBooks Add-in program after DocuXplorer's initial installation:

- Open Control Panel
- Select "Add or Remove Programs"
- Select "DocuXplorer"
- Click the "Change" button to modify the DocuXplorer installation
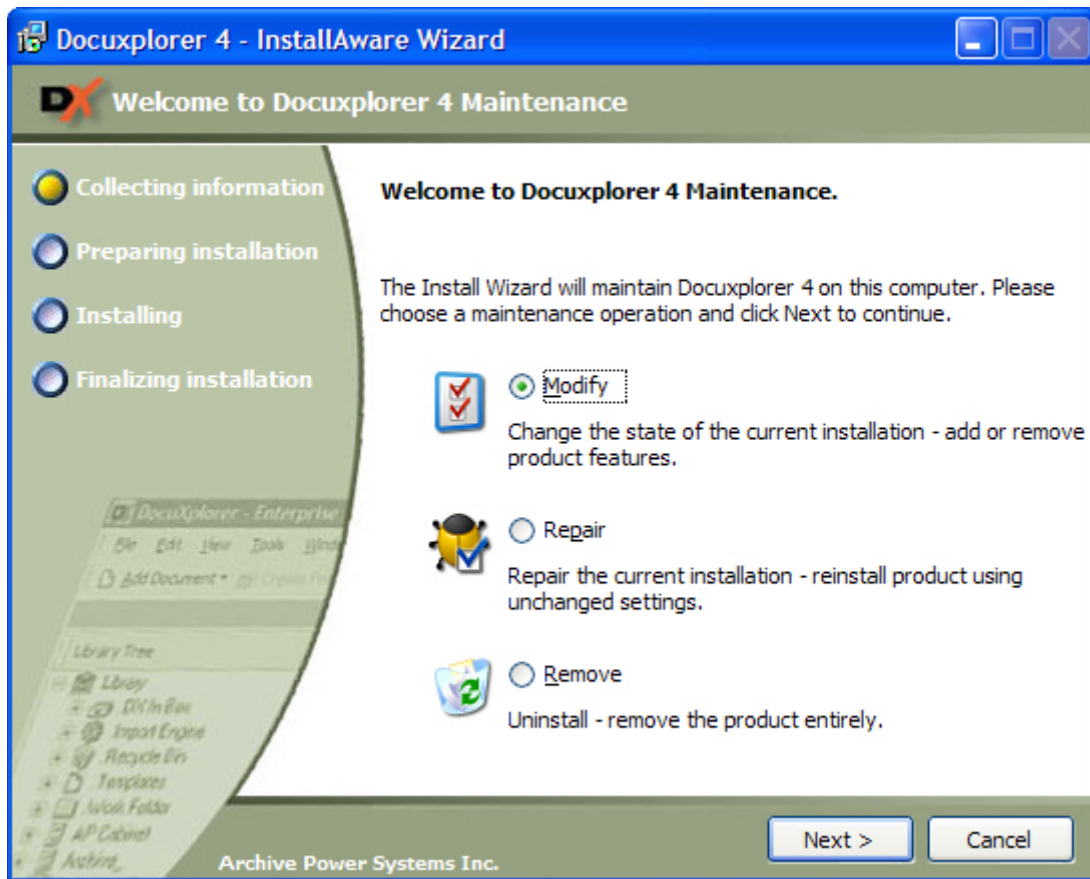
- Select "Modify"
- Select QuickBooks, the item might have an X over it meaning it is not installed
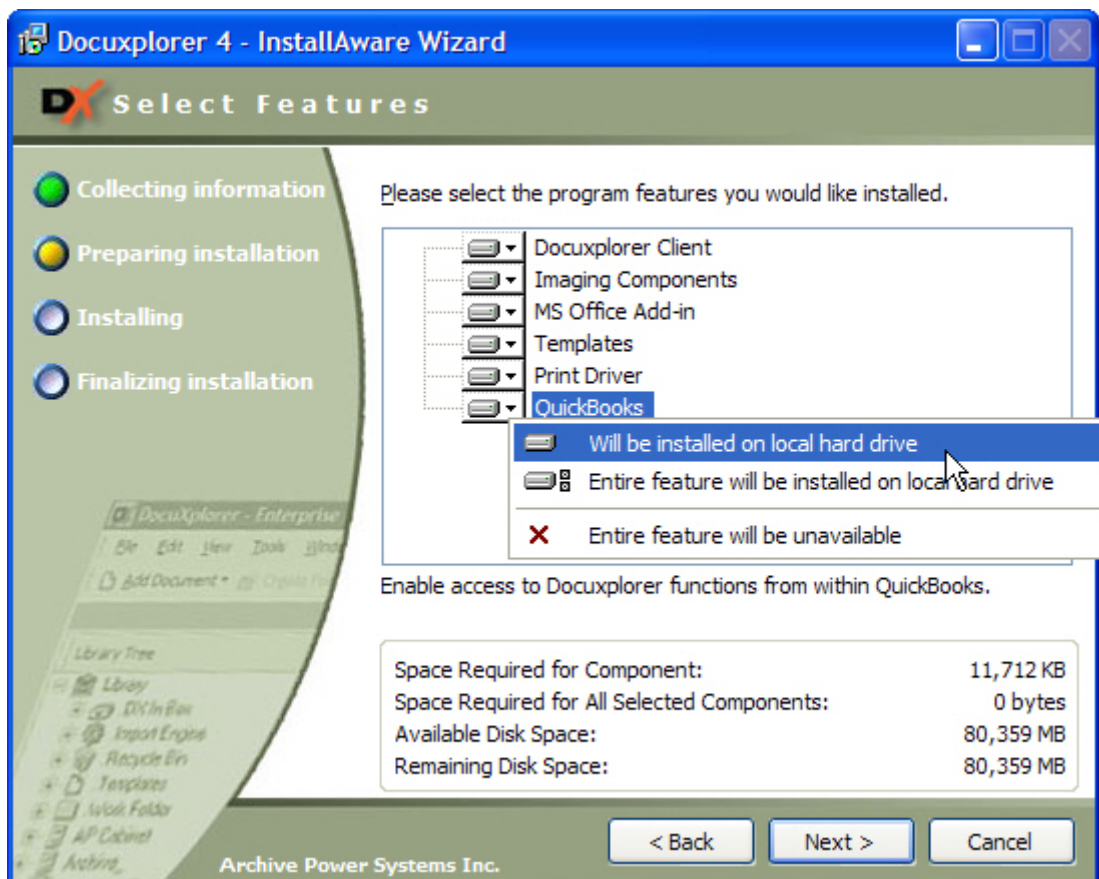
- Select the first item in the pop-up menu "Will be installed on local hard drive"
- Click "Next" until installed

To Register DocuXplorer with QuickBooks:

- **For versions of QuickBooks 2008 or greater you will to end the QB32.exe process from the task manager.**
- **Open DocuXplorer (For Vista and Windows 7 Users right click on the DX icon and select run as Administrator)**
- Select on the menu bar Tools | Options | QuickBooks Defaults
- Check the box Register DocuXplorer
- Click Save and Close

To Import an Index Set
- Open the DocuXplorer Library
- Select the Library Work Folder
- Click the Index Set Tools drop-down menu from the Toolbar
- Select Index Set Manager
- From the "Index Set" menu item select "Import Index Set"

- Locate the Index Set to import using the Import Index Set browse screen. The default location for a local workstation installation is C:\Program Files\DocuXplorer\Templates\IndexSets or if Enterprise has been installed on your server, the files are under the ..\DXDOCS\DXInstall\Templates\IndexSets folder.
- Highlight the QB Index Sets and click Open
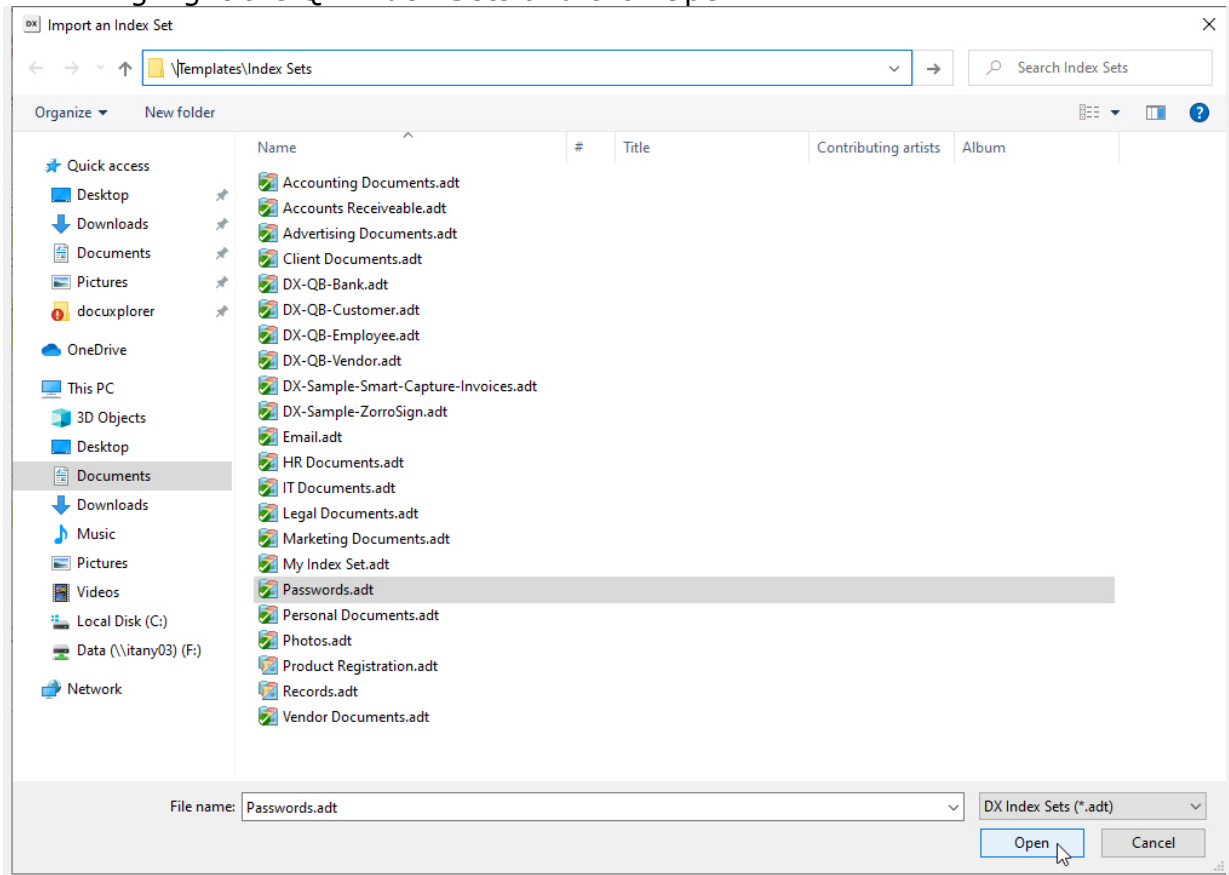
The Index Set will automatically be imported and added to the Library.

The next step in the installation process is to integrate the DocuXplorer software in QuickBooks.

In QuickBooks:

- **For versions of QuickBooks 2008 or greater you will to end the QB32.exe process from the task manager.**
- **Open QuickBooks (For Vista and Windows 7 Users right click on the QuickBooks icon and select run as Administrator)**
- On opening a company in QuickBooks you will be presented with a screen that asks you to allow DocuXplorer access to read QuickBooks data and

enhance the QuickBooks interface. The DocuXplorer integration does not modify any QuickBooks data, it merely extracts data from saved transactions to populate DocuXplorer index fields - no change is ever made to any QuickBooks data.

- Certificate Information - certification is pending and the use of DocuXplorer will in no way affect the operation of QuickBooks other than to enhance its functionality.
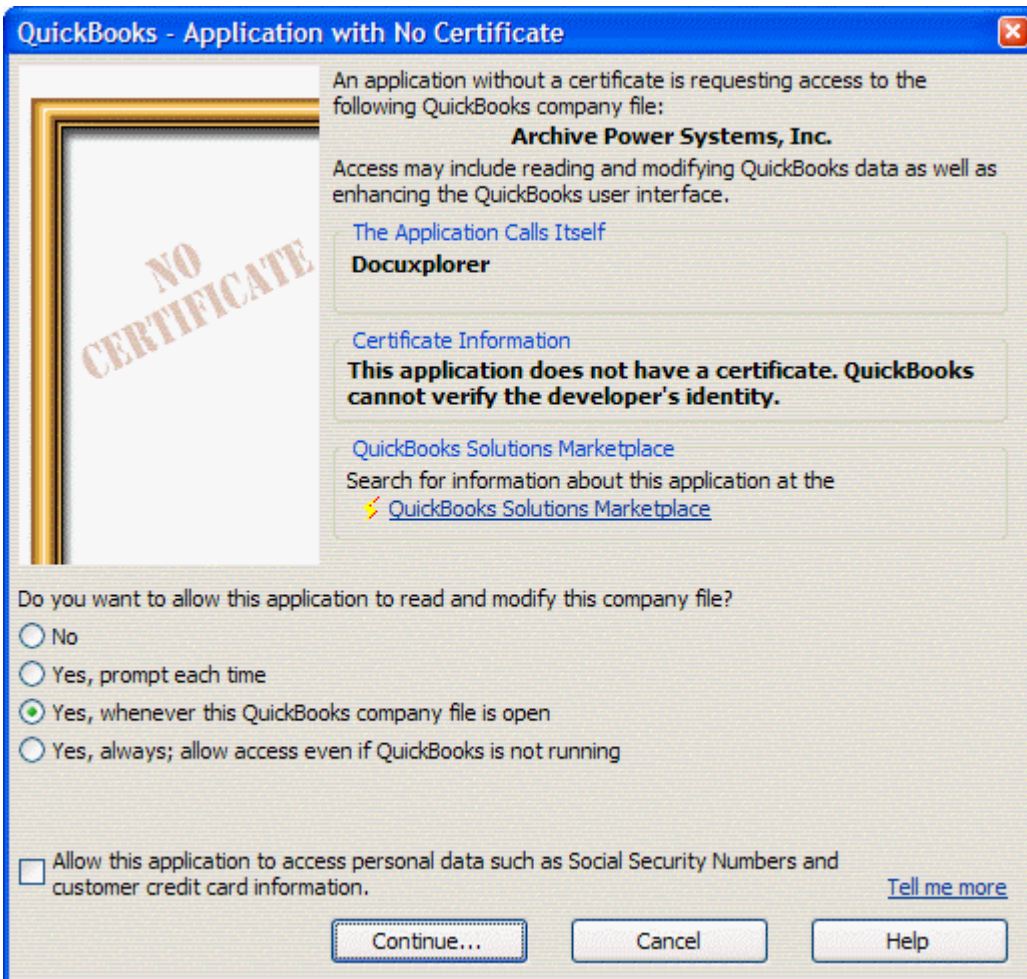
- Select an option to allow DocuXplorer access to QuickBooks
    - No - this refuses access to QuickBooks and does not allow DocuXplorer to integrate.
    - Yes, prompt each time - this allows DocuXplorer to integrate but offers a prompt to allow access each time you add or find a document
    - **Recommended - Yes, whenever this QuickBooks company file is open -** DocuXplorer is able to function along with QuickBooks as an integrated document library.

- Yes, always: allow access even if QuickBooks is not running - selecting this option allows DocuXplorer is work along with QuickBooks as an integrated product but since DocuXplorer does not modify or need QuickBooks to run as a standalone product, this level of integration is not required.

- Allow this application to access personal data such as Social Security Number and customer credit card information - this option should be selected if you wish to pass index data such as credit card number or Social Security numbers on to DocuXplorer to index documents that are identified by this data such as: Employee documents.

- After selecting an option click Continue

- A confirmation screen will then be displayed informing you of the access rights that you have provided DocuXplorer. Click Done to complete the integration.
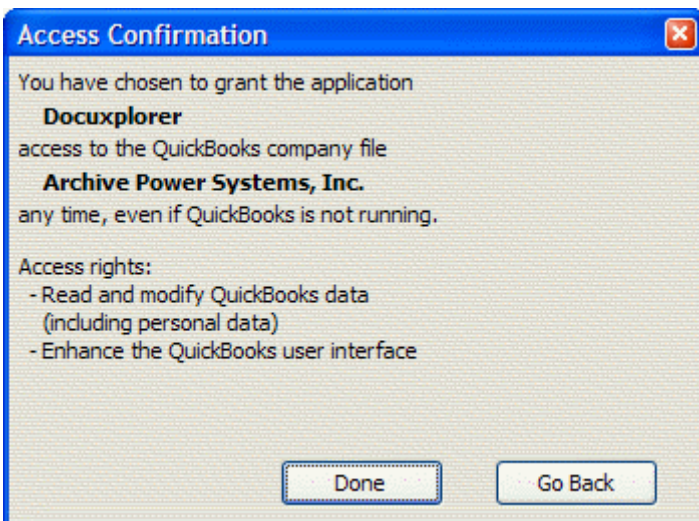
At this point DocuXplorer has been integrated with QuickBooks, you can use all the integration features directly from the QuickBooks <File><DocuXplorer> menu item.

Tip:

If you are installing the QuickBooks add-in to be used with a multi-user installation of QuickBooks, enter QuickBooks with the user name "Administrator" along with the Administrator password the first time you use QuickBooks with DocuXplorer. This will provide you with access to allow DocuXplorer to be integrated into the desired QuickBooks accounting database. All other steps are the same as documented.

QB Transaction integration with DocuXplorer

This Help topic refers to all DocuXplorer versions only when the optional QuickBooks Integration package has been purchased and installed

QuickBooks transaction data is used to index documents in DocuXplorer. The most relevant transaction data fields are automatically passed to DocuXplorer to identify the document. This is often all the information needed to find your transaction documents . You can add index information to other fields as desired if it serves your business process. Users can also add index fields to a QB Index Set but should not change the any pre-defined field name. Pre-defined field names are coded into the Integration Utility, any changes will prevent DocuXplorer from automatically pulling the data from a QuickBooks transaction and populating it in the pre-defined field.

DocuXplorer Storage Location and Associated	QB Integrated Transactions Navigation Screens	Data Automatically Captured

Index Set		
Customer All customer transaction documents are stored in the Customer Drawer Associates: QB-Customer Index Set	Estimate	Customer Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Sales Orders	Customer Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Invoice	Customer Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Sales Receipt	Customer Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Refunds and Credit	Customer Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Receive	Customer Name

	Payment	Date
		Document Type
		Reference Number - only if a Reference Number has been included in the transaction data
		Payment Method
	Deposit * *Documents added from a deposit transaction is placed in the Banking Drawer	Deposit to Date
Vendor All customer transaction documents are stored in the Vendor Drawer Associates: QB-Vendor Index Set	Enter Bills	Vendor Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Purchase Orders	Vendor Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Receive Items	Vendor Name Date Document Type Reference Number - only if a Reference Number has been included in the transaction data
	Receive Items with	Vendor Name Date

	Bill	Document Type
		Reference Number - only if a Reference Number has been included in the transaction data
Employee All customer transaction documents are stored in the Employee Drawer Associates: QB-Employee Index Set	Edit Employee	Employee Name Social Security Number - only if you have allow DocuXplorer to access Social Security Numbers on installation.
Banking All customer transaction documents are stored in the Bank Drawer Associates: QB-Bank Index Set	Write Checks	(Pay to Order of) Name (Check) Reference Number (Check) Date
	Deposit	Deposit to Date
	Credit Card Charges	Name Date Reference Number - only if a Reference Number has been included in the transaction data

Adding Documents from QuickBooks

This Help topic refers to all DocuXplorer versions only when the optional QuickBooks Integration package has been purchased and installed

DocuXplorer will automatically index and store documents added through QuickBooks. The first step in adding documents from QuickBooks is to create a QuickBooks transaction. The transaction is created by entering the transaction data in QuickBooks and saving it by clicking on Save and New. Re-display the saved transaction by clicking on the Previous button on the QuickBooks Toolbar. Documents added to DocuXplorer through QuickBooks are then associated with that specific transaction. A user can choose to add a scanned in document using either the Quick Scan or Scanned Document methods. Electronic documents such as Word, Excel or other computer files can also be added by importing them from a folder on any local or network drive. Multiple documents can be associated with a single transaction. A search from QuickBooks using the <Find Document> menu item in <File><DocuXplorer> will display all documents associated with the displayed transaction.

To add a document to DocuXplorer from the QuickBooks menu;
- Add a transaction in QuickBooks
- Click Save and New
- Click Previous on the QuickBooks Toolbar

or
- Select any previously saved transaction
- From QuickBooks select <File><DocuXplorer>
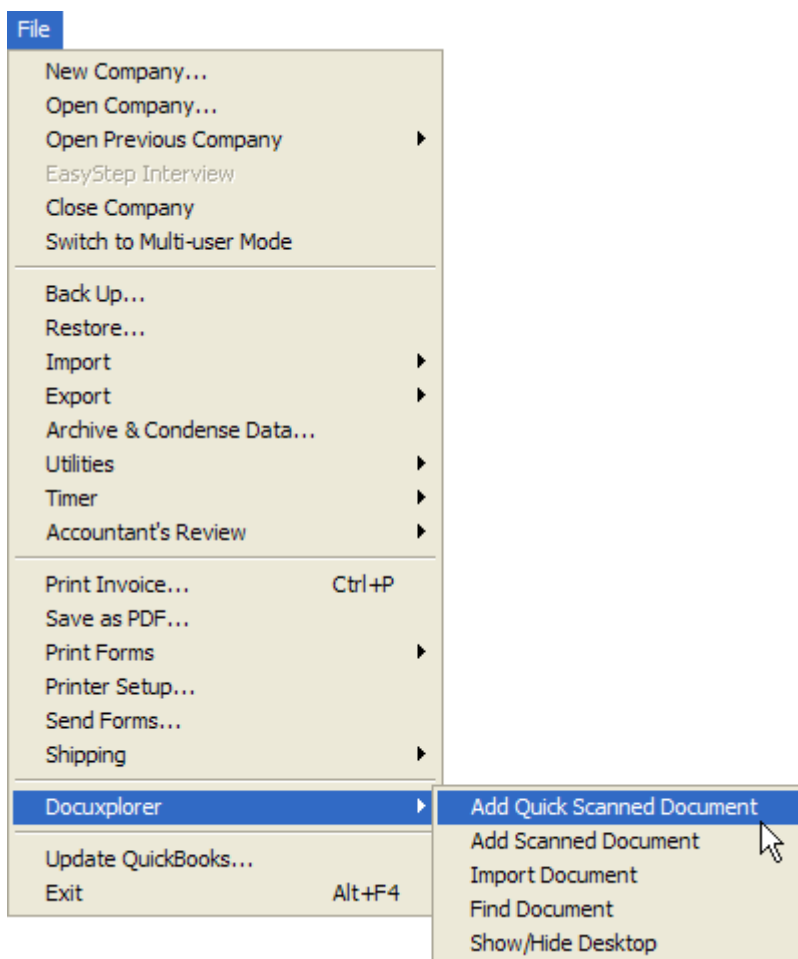
- Select to add either a Quick Scanned Document, a Scanned Document using the scanner interface or to Import a document

- A DocuXplorer document window will open showing the scanned or imported document on the right side of the screen and the auto-indexed data entries on the left

- To complete adding the document, enter any additional index information if desired and click Save and Close

Tip:

If you change focus off the Add New Document Window before it is saved it will remain open but will placed behind other Windows open on your Windows Desktop. To view the unsaved Document Window use Alt+Tab to cycle through your open Windows to bring the Document Window to the front. you can Save and Close the document.

Document added to DocuXplorer from any QuickBooks screen not supported by DocuXplorer will be added to a Drawer and Folder titled Unknown

Finding Documents from QuickBooks

This Help topic refers to all DocuXplorer versions only when the optional QuickBooks Integration package has been purchased and installed

Finding a document from QuickBooks is as simple as selecting a transaction and from a QuickBooks menu item File | DocuXplorer | Find Document to display all the documents associated with the transaction listed in a DocuXplorer Query Results List ready to be opened, faxed, printed or e-mailed.

Users can also use the Query Results List to create new Queries that will search the DocuXplorer Library for other QuickBooks transaction documents.

To find a document from QuickBooks
- Select the transaction in QuickBooks
- Select the menu item File | DocuXplorer | Find Document>
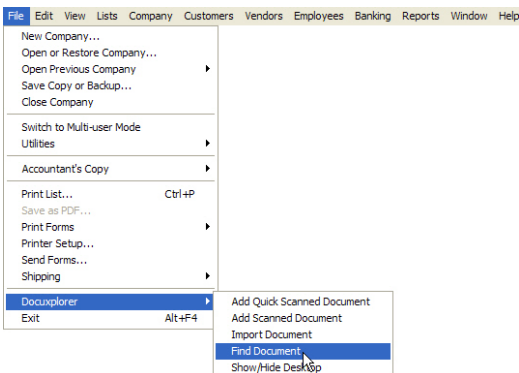
- If a single document is associated with the transaction it will automatically open.
- If more than one document is associated with a transaction the Find Document Query Results List will display with all documents associated to the transaction.
- Select the document view from the DocuXplorer Query Results List and double click to open or right-click to bring up a menu
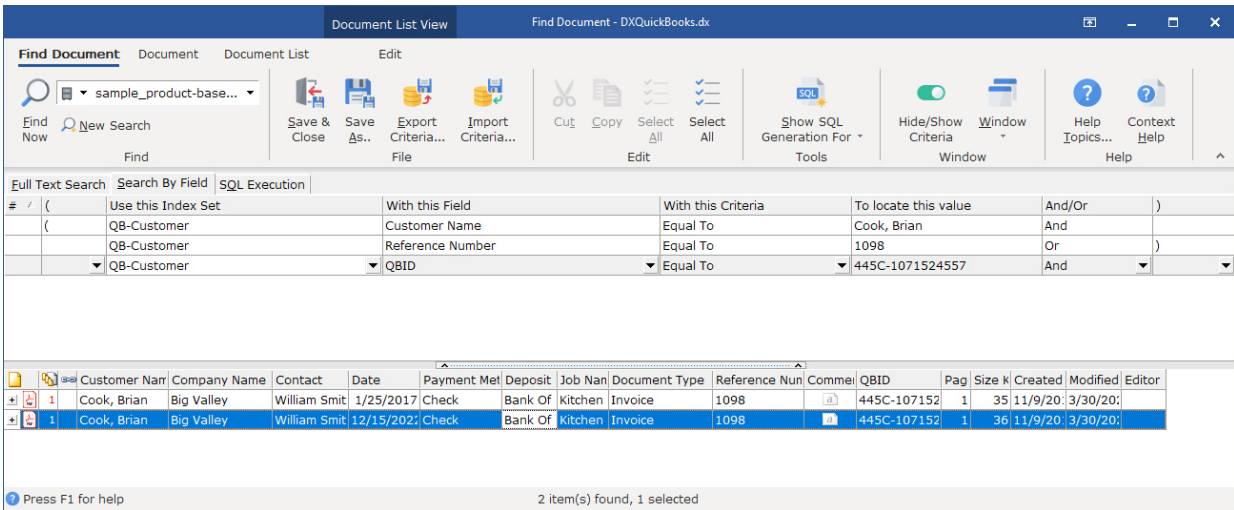
Users can use the Find Document dialog box as shown above to change search criteria and expand or limit their search as need. You can see more information about DocuXplorer search by clicking on the link to the DocuXplorer Search Engine Overview

Note - DocuXplorer can also locate documents by QuickBooks Transaction ID select Tools | Options | QuickBooks | Included QuickBooks Transaction ID to find documents to turn on this feature. see help "QuickBooks Defaults" for more details

Show/Hide Desktop From QuickBooks

This Help topic refers to all DocuXplorer versions only when the optional QuickBooks Integration package has been purchased and installed

The Show/Hide menu item is available from the QuickBooks <File><DocuXplorer> menu.

When selecting any function from the QuickBooks <File><DocuXplorer> menu QuickBooks sends a command to DocuXplorer to automatically open and integrate with QuickBooks. When DocuXplorer opens in this manner it remains hidden until you choose to display the DocuXplorer Desktop Window. The Show/Hide command will toggle between displaying and hiding the DocuXplorer Desktop Window. Closing QuickBooks will automatically close DocuXplorer.

If DocuXplorer had already been open, QuickBooks will automatically connect to DocuXplorer and the DocuXplorer Desktop will remain visible. Once you take any action from QuickBooks it will control the closing of DocuXplorer.

If you close DocuXplorer before you close QuickBooks you will receive the error message shown below. Select No, this will close your Library but leave DocuXplorer open. In the DocuXplorer Desktop select <File><Open Library> to reopen your Library and close QuickBooks first to properly shut down DocuXplorer
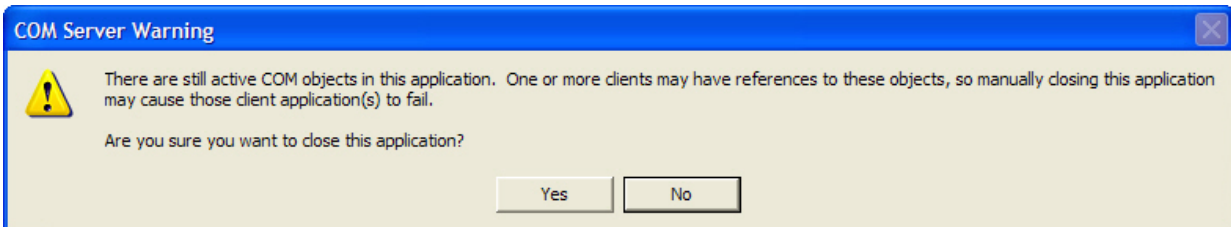
The Knowledge Base

How to Contact Technical Support

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

DocuXplorer Software provides new users with email support for one year from the date of purchase.

 If you purchased your DocuXplorer Software from a reseller please contact that reseller for support.

After the first year email support is included in the DocuXplorer Update Subscription. Subscription rates listed on the DocuXplorer web site Online Store will apply.

Telephone Support levels;

>   Level 1 - incidents are limited to telephone responses to product usage issues.
>   Level 2 - incidents are limited to program, networking, and hardware issues where a support technician is required to diagnose the issue or remotely access your computer .
>   Level 3 - incidents include corrupted database rebuilds due to unstable client computing environment and other issues not covered by Level 1 or Level 2.

Determination as to what constitutes an incident will solely be governed by the decision of Archive Power Systems, Inc. and DocuXplorer Software.

Contact tech support via e-mail. Please use the tech support email form available from the Help menu in DocuXplorer.

Free e-mail support does not cover programming assistance for either the API or Import Engine configuration. Support for these items requires purchase of Level 2 Technical Support.

The answers to many frequently asked questions can be found on the DocuXplorer website, at http://docuxplorer.com/Support/KnowledgeBase/tabid/81/Default.aspx. Also of

interest in the support section of the web site are the video tutorials, white papers, and progam help online

Tip:

The computer that will e-mail tech support must have an Internet connection and a MAPI compliant email system such as Outlook or Outlook Express setup. Lotus Notes users must have the MAPI driver installed.

To e-mail tech support:
- Select the Help menu item Product Support to automatically create a pre-addressed email for tech support
- Follow the instructions on the email giving details on when and how you first noticed the issue
- A DocuXplorer technical support representative will email or call you back within 24 hours.

To contact tech support;

Email: support@DocuXplorer.com

Product Comparison by DocuXplorer edition

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Features	Enterprise	Small Business	Professional	Personal
Multi-user client/server system	∎	∎		
Access via the Internet for remote users	∎			
Maximum size of library	Limited by Hardware	100 gigs	50 gigs	10 gigs
Number of Cabinets that can be created in a Library	Unlimited	Unlimited	Unlimited	Unlimited
Security - user/group security on every function associated with a DocuXplorer object	∎		∎	
Security for Index Set and Field Management	∎		∎	
Import users from Active Directory Sources	∎		∎	
Network Login access	∎			
Multiple Batch Scanning Methods	∎		∎	
Image Batch Processing	∎		∎	
Searches for documents off-line on other media (i.e. CD-R)	∎	∎	∎	
Document Check in/Check out	∎		∎	
Versioning - create and track unlimited versions of a document	∎		∎	
Library Event Log	∎		∎	
Document Event Log - audit trail	∎		∎	

Send documents from Windows Explorer to DocuXplorer	▫	▫	▫	
Auto-Indexing using variables to populate fields	▫	▫	▫	
Saved Search Documents	▫	▫	▫	
Create Workflows using Saved Search Documents	▫	▫	▫	
Scan as PDF or TIFF image	▫	▫	▫	▫
Integration with Microsoft Office applications	▫	▫	▫	▫
Print Driver, automatically opens DocuXplorer and creates PDF document	▫	▫	▫	▫
Convert any printable document to PDF for storage or for export or as an email attachment	▫	▫	▫	▫
Merge multiple files of different document types into a single PDF document	▫	▫	▫	▫
Option to open DocuXplorer to last folder viewed	▫	▫	▫	▫
Auto-Update	▫	▫	▫	▫
Unlimited number of Drawers can be created in a Cabinet	▫	▫	▫	▫
Unlimited number of Folders can be created in a Drawer	▫	▫	▫	▫
Multiple user-defined Index Sets to profiles by document type	Unlimited	Unlimited	Unlimited	Unlimited
35 user-defined fields in an Index Set	▫	▫	▫	▫
Auto-complete Static Data Lookup List Fields	▫	▫	▫	▫
Auto-complete Dynamic Data Lookup Fields	▫	▫	▫	▫
Auto-complete Static Data Check Box Fields	▫	▫	▫	▫
Auto-complete Static Data	▫	▫	▫	▫

Color Coded Lookup List Field				
DX Inbox to import documents from any folder on a local or network drive	▪	▪	▪	▪
Heads-up Indexing for Image and PDF Documents	▪	▪	▪	▪
Auto-Collate	▪	▪	▪	▪
Built in Optical Character Recognition (OCR)	▪	▪	▪	▪
Thumbnail view of pages in a multi-page document	▪	▪	▪	▪
Manipulate multiple page document pages using drag and drop	▪	▪	▪	▪
Complete set of image document annotation tools	▪	▪	▪	▪
Documents can be printed with or without annotations	▪	▪	▪	▪
Add, print or delete pages in a multi-page document	▪	▪	▪	▪
Import any type of computer-generated file	▪	▪	▪	▪
View and edit computer-generated documents using their original source program	▪	▪	▪	▪
Full Text Search on index fields data and OCR text	▪	▪	▪	▪
Full Text Search on the content of electronic documents	▪	▪	▪	▪
Boolean Full Text Search	▪	▪	▪	▪
Proximity Searches through the full text of any electronic document or document OCR text	▪	▪	▪	▪
Boolean index search by field	▪	▪	▪	▪
Group documents by field in a Document List View	▪	▪	▪	▪
Create summary fields by group in Document List View	▪	▪	▪	▪

Export the index data in a Document List View to create formatted reports in Excel or HTML	▫	▫	▫	▫
Email document directly from DocuXplorer	▫	▫	▫	▫
Fax documents directly from DocuXplorer	▫	▫	▫	▫
Print document directly from DocuXplorer	▫	▫	▫	▫
Basic and Advanced Interface modes	▫	▫	▫	▫
Recycle Bin	▫	▫	▫	▫
Single-user - local computer version		▫	▫	▫

SEC and FINRA Compliance

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

DocuXplorer provides Financial Services firms with a document management system that complies with SEC and FINRA regulations requiring client document/record privacy and retention.

The SEC Final Ruling states;

(2) General requirements. The investment company, or person that maintains and preserves records on its behalf, must:

(i) Arrange and index the records in a way that permits easy location, access, and retrieval of any particular record;

(ii) Provide promptly any of the following that the Commission (by its examiners or other representatives) or the directors of the company may request:

(A) A legible, true, and complete copy of the record in the medium and format in which it is stored;

(B) A legible, true, and complete printout of the record; and

(C) Means to access, view, and print the records; and

(iii) Separately store, for the time required for preservation of the original record, a duplicate copy of the record on any medium allowed by this section.

(3) Special requirements for electronic storage media. In the case of records on electronic storage media, the investment company, or person that maintains and preserves records on its behalf, must establish and maintain procedures:

(i) To maintain and preserve the records, so as to reasonably safeguard them from loss, alteration, or destruction;

(ii) To limit access to the records to properly authorized personnel, the directors of the investment company, and the Commission (including its examiners and other representatives); and

(iii) To reasonably ensure that any reproduction of a non-electronic original record on electronic storage media is complete, true, and legible when retrieved.

SEC compliance features in DocuXplorer include:

- The ability to store documents/records electronically in a secure database
- Index documents for quick location and access of stored documents and records
- DocuXplorer can store documents/records as true and legible copies safeguarded from alteration in either TIFF or PDF format
- Access to view and print documents
- User Login with password - users must login and use password to access documents
- Inactivity time out - this feature will cause DocuXplorer to automatically log out a user when the mouse and key board is inactive for the specified amount of time. Inactivity time out is user-definable.
- Security - password protection can be set for each object, Cabinet, Drawer, Folder or Documents. Security rights can be set for objects allowing for Read/Write, Read only, Full Control, or None (object can not be accessed).
- Document Event Log - log automatically keeps a record of actions (called events) taken with a document. Events stored with documents are Add, Modified, Viewed, Version Created, Printed, E-mailed and more. Stored events also contain the event data and time operator (user) who performed the event.
- Administrative ability to deny print screen functionality
- Libraries can be burned to CD or DVD as a duplicate Read Only copy of all records and documents stored.

DISCLAIMER:

While DocuXplorer has made every effort to properly interpret SEC regulations, a compliance officer should be appointed to determine that all regulations are followed. SEC regulations cover more than the management of client document/records and in no way should it be construed that DocuXplorer can provide total compliance .

HIPAA Compliance in DocuXplorer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

DocuXplorer provides health care facilities with a document management system that complies with HIPAA regulations requiring medical record privacy.

HIPAA compliant features in DocuXplorer include:
- User Login with password - users must login and use a password to access patient documents
- Inactivity time out - this feature will cause DocuXplorer to automatically log out a user. Inactivity time out is user-definable.
- Security - password protection can be set for each object, Cabinet, Drawer, Folder or Documents. Security rights can be set for objects allowing for Read/Write, Read only or None (object can not be accessed).
- Document Event Log - log automatically keeps a record of actions (called events) taken with a document. Events stored with documents are Add, Modified, Viewed, Version Created, Printed, E-mailed, and more. Stored events also contain the event data and time operator (user) who performed the event.
- Administrative ability to deny Print Screen functionality.

DISCLAIMER:

While DocuXplorer has made every effort to properly interpret HIPAA regulations, a HIPAA compliance officer should be appointed to determine that all HIPAA regulations are followed. HIPAA regulations cover more than the management of patient documents and in no way should it be construed that DocuXplorer can provide total HIPAA compliance for a medical facility.

Data Backup and Restore

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Backing up your computer data is essential to assuring you the ability to easily recover from any data corruption.

Backing up the data in a DocuXplorer Library is accomplished by simply adding the \DXDOCS and its sub-folders on your local or network drive to your daily backup routine.

Standard practice for a backup routine is to create a new full copy of the DocuXplorer data for each day of the week - overwriting the previous week's day-to-day backup. Full copy of the data is required as you can not rely on an incremental or differential backups for relational databases.

Tip:
When backing up DocuXplorer data make sure that all users have closed out of the DocuXplorer program or have backup software with agents that allows backups while files are open.

Full Restore
Use your backup software to restore the entire /DXDOCS folder from the last backup saved before the problem occurred. A complete restore would roll back the entire Library. With this process, you will lose any data added since the backup used to restore.

Partial Restore
To restore a single Cabinet;
- right-click the Cabinet to restore and select <Properties>
- On the "General" tab locate and write down the "Database ID" and "Connection Path".
- Exit DocuXplorer
- Using your normal backup software, restore all files that start with the Cabinet's "Database ID" ex. (CAB########*.*) back to its original location ("Connection Path").

To restore a single Drawer;
- right-click the Drawer to restore and select <Properties>

- On the general tab locate and write down the "Database ID" and "Connection Path".
- Exit DocuXplorer
- Using your normal backup software, restore all files that start with the Drawer's "Database ID" ex. (CAB#######DRW########*.*) back to its original location ("Connection Path").

Tip:

If you are not able to access a Drawer's property information, right-click the Drawer and select <Disconnect>; a message will be displayed. Restore all files that start with the file name presented in the Disconnect Drawer dialog box.

Organizing a DocuXplorer Library

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The goal of a good document management system is to accurately find the documents or set of documents you need instantly. Any search that gives you a long list of documents to look through is not going to increase your productivity. Using the DocuXplorer Index Fields you will want to make sure to identify each document so that a search will bring up the specific document you are looking for.

Before implementing any hierarchy in DocuXplorer it is best to look at your business process:

1. What is the organizational structure of your business - is your business set up by department such as accounting, human resources, etc.?
2. What needs to be accomplished using those documents (i.e. are you simply archiving documents or will you use those documents daily)?
3. How do workers handle those documents now (i.e. are documents shared by a number of workers, do they need to be faxed, printed or e-mailed, do documents have to be shared with users at a remote location)?
4. What information are you normally given to search for a document (i.e. client or vendor name, invoice, social security or other number, date, type of document)?
5. Would you like to simply archive documents or use documents in a workflow?

Taking all this into account and as with any organization the particular needs of each individual company we can set some basic rules as to how to set up a document management system using DocuXplorer.

The main elements of DocuXplorer are:

Library - This is the highest level of the DocuXplorer hierarchy.

The Library contains the DocuXplorer objects that make the program intuitive to any user as they represent the same objects in a physical office environment. Those objects are Cabinets, Drawers, Folders and Documents. Each object in a DocuXplorer Library contains properties that control its functionality. Object properties are specific to each object and can be set or changed by the object's owner or an administrator from its properties dialog box. Properties include security, ownership, and association.

The Library also contains special objects such as the Recycle Bin and Work Folder. The Recycle Bin is used to aggregate all deleted documents as it does in the Windows operating system and allows users to restore documents that have been accidentally deleted. The Work Folder is valuable as an object in workflow creation. Create subfolders to the Work Folder either by individual or task to create a work flow or mailbox system and move documents to the proper folder for review or action. The Work Folder is also used as a default folder when adding documents using the Send To command from Windows Explorer with the program closed.

Access to a Library can be set for a local area where all users are within the physical boundaries of a company location or a wide area where users at a remote location connect to a company server using an Internet connection. Security can be applied to these objects to allow access to a particular workgroup or individual.

Within the Library a logical hierarchy is created that is intuitive for users to easily find documents - even if they are unfamiliar with the use of other DocuXplorer search features.

Cabinets - This is the second level of the hierarchy. **The Cabinet object is the unit of the database that holds the index information for all documents contained in that Cabinet**. The Cabinet should be used to define the main subject of the documents contained therein.

The best way to think of this object is to think about searches. Since the index information is stored at the cabinet level, the highest level that can be searched is a cabinet. Therefore you want all the documents that you want to search through in the same cabinet.

When creating a cabinet you can create an unlimited number of drawers so you need not think in physical terms like a four-drawer file cabinet. To illustrate let's take a large Accounting department with hundreds of thousands of documents as an example. When a user is searching for an account payable document they do not need to search through accounts receivable. If this system contains a large number of documents and AP and AR were in the same cabinet, the search would be slowed down by the sheer volume of the documents stored. By separating the two departmental subjects you can store large numbers of documents and still have quick retrieval without filling up search results with totally unrelated documents.

Drawers - **DocuXplorer Drawers hold the document image database.** The Drawer object provides users with a logical method of creating subgroups within a larger grouping. For example the Accounts Payable Department might have a Cabinet of its own to store documents. Within that Cabinet they would want to store payable

invoices in groupings by year. They would then create a Drawer for each year in the Accounts Payable Cabinet (i.e. a drawer for the year 2003). Within the AP 2003 Drawer they would create Folders for each month to store that months documents. In this way even a user unfamiliar with the use of DocuXplorer's search engine could easily find a document based on the logical hierarchy created by the Cabinet, Drawer, Folder display in the Library Tree.

Folders – A Folder consists of a [List View](#) of all the documents placed in it for storage. In the Folder object you can, sort, group and subgroup its documents as well as add calculated summary fields for an index field in a group or subgroup. You can [modify Index Sets](#) either adding or deleting fields as well changing their properties. Folders also allow users to export the contents list view to either an Excel spreadsheet, XML, CSV text file, or HTML page to create reports.

Index Sets - *Proper indexing of documents is the key to a successful document management system. I cannot emphasize enough the need for proper document indexes to provide fast and accurate document retrieval.* The ability to create [Index Sets](#) allows the user to speed index entry. Index Sets can be setup for an unlimited number of document types. Use the different auto-complete field types, Static Data Lookup Lists and Dynamic Data Lookup Lists available in an Index Set to make index data entry faster and more accurate. Many documents being entered for archiving often need a similar set of default indexes. Some documents may need index fields to default to the same index information each time that a similar document is entered. That index information might be an account number or client name. DocuXplorer can automatically auto-complete the entry based on a static lookup list or from previous entries to that data field. Index Fields can also be auto-populated with the use of [variables](#) such as Folder Name, today's date, incrementing numbers (to use for serial or Bates numbering) and more. Yet another advantage of Index Sets and fields is the ability to group or sub-group by fields. Use the Group function rather than a set of subfolders. View all the documents in a folder displayed by group based on an index field entry.

OCR Text Field - **This field holds the electronic text created when a document is put Optical Character Recognition.** When OCR is performed on a document the text of that document will be placed in the FTS (Full Text search) Field. It is recommend that you use Zone OCR to increase the accuracy of document searches

Memo Fields - Users can write memos or commentary, review notes, contact information or any other information needed to let other users access additional knowledge about that particular document. Access to Memo fields can be found either in the Document Viewer or Document List View for viewing and editing. All information added in a memo field is included in either a Full Text or Boolean Search.

Workflows - Use DocuXplorer Index Set fields with Saved Search Documents to create workflows that can be placed on your computer's desktop or attached to an email. Start by creating two additional fields in your Index Set. One field is Assigned To and the other Status. The Assigned To field should be a Static Data Text Field with a list of all users or groups who might have a document assigned to them. The Status Field should be a Integer Field with its edit control set to Static Color Lookup Field with color codes and text identifying the status of the document. The document status field might contain items like clRed=Needs Action, clYellow=To be Reviewed, clGreen=Completed. Now DocuXplorer provides a Color Coded Static Data Field as part of the All Documents default Index Set to facilitate creating workflows. It's then easy to create searches for documents that fit the Assigned to and Status data, see the following link on Saved Search Documents to see examples.

DX Inbox – **The DX Inbox is used to import documents directly from any folder on a network or local hard drive.** Locate a folder on a local or network drive to select files that are then imported to a DocuXplorer folder using simple drag and drop. The DX Inbox also provides users with many of the functions of Windows Explorer.

The DX Inbox is a very valuable tool for those users who have Network scanners. Network scanners will create a TIFF image file or PDF and save it to a network or local drive. Open DocuXplorer and use the DX Inbox to access those images to store in DocuXplorer. You can also use the DX Inbox to import any computer-generated Word, Excel or other file directly into a DocuXplorer Folder.

DocuXplorer PDF Print Driver - **The PDF Print Driver is a print capture program that creates an image of any document that can be printed from a Windows program and sends it to the DocuXplorer Library.** This gives DX users the ability to send document images from any Windows program, even custom built and proprietary programs directly to DocuXplorer. While a user can still import computer-generated documents that they can edit and version, the image of a document created by the Print to DocuXplorer Driver is not editable. Users often find this to be a valuable way of saving final edits of documents, email, faxes or web pages they wish to archive for any reason.

Move documents to read only media

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

DocuXplorer documents can be stored off-line on other storage media such as DVD or external hard drive. Documents are stored off-line by moving a Cabinet and its Drawers files to the storage device. Users can then access the Cabinet and its contents from the off-line storage media as long as the drive that runs the media is connected locally to the computer or server that holds the DocuXplorer Library. For this case we'll use DVD, the same method would be used for any other type of storage device.

All connections to DocuXplorer - Library and Cabinets, must be made with UNC Paths.

From the DocuXplorer Desktop, select Connect/Create Library from the File menu item and make sure the Library Connection Path is entered as a UNC Path.

> A UNC Path consists of the Server or Computer Name, Drive Letter, Folder and Subfolder (i.e. \\MYCOMPUTER\C$\DXDOCS\DXLIBRARY).

Share the DXLibrary Folder

Next go to Windows Explorer, select the folder \DXLIBRARY and share it with the name DXCABINET, making sure to allow users Full Permissions. In the image below you will see that the item "Allow network users to change my files" is checked - this allows users the required permissions.

 IT IS VERY IMPORTANT THAT THE SPELLING AND CASE OF THE SHARE NAME BE EXACTLY AS SHOWN EACH TIME YOU CREATE THE SHARE - IF YOU MISSPELL THE SHARE NAME YOU MAY NOT BE ABLE TO RECONNECT TO THE CABINET.

Or if you are using a server based edition;
- Click the <Permissions> button
- Select Everyone from Share Permissions
- From Permission for Everyone check Allow on Full Control.
- click the <Security> tab
- Make sure Administrator, System and User groups are present. If not, add them

▪ Make sure for each group that "Full Control" is set to "Allow"

To move a Cabinet to read only media:
- ▪ Highlight the Cabinet you intend to archive off-line
- ▪ From the right-click menu select Properties
- ▪ In the General Tab, note the Database ID of the Cabinet to be moved. The Cabinet ID is a long string of numbers and letters - we suggest you write them on piece of paper before you attempt to move any files.
- ▪ Also in the General Tab, note the Connection Path for the Cabinet files. You will need this location for the next step.
- ▪ [Disconnect the Cabinet from the Library](#)
- ▪ [Reconnect the off-line Cabinet](#) by using the Connect Cabinet dialog available by right clicking on the Library icon and browse to Network Neighborhood or My Network Places and select the DXCABINET share you created above
- ▪ Close DocuXplorer
- ▪ Using Windows Explorer, locate all files whose prefix corresponds to the Database ID of the Cabinet to be moved. (i.e. CAB20033715036.*)
- ▪ Use your DVD writer software to then copy the files that make up the Cabinet and its Drawers to the root of the DVD.
- ▪ In Windows Explorer remove the share called DXCABINET from the DXLibrary folder and create a new share called DXCABINET on the root of the read only drive to which you have moved the Cabinet. Follow the instructions above for sharing a folder and make sure that the share has full permissions. If you have moved the Cabinet to a folder on the DVD you will need to put the share DXCABINET on the folder containing the Cabinet files
- ▪ Open DocuXplorer

The data stored on the DVD or other read only storage device are the document images and their associated index information. This data can now be accessed from the off-line media as long as the drive that reads the media is attached to a computer or network server with DocuXplorer installed and a Library configured.

Tip:

You can not run an off-line Cabinet from magnetic tape, it must first be restored to a local drive on the server or computer that contains the DocuXplorer Library.

Data moved to DVD, CD-R, or other read-only media that is then copied back to a hard drive will be copied with the folder and file attributes changed to read-

only. DocuXplorer does not change any file attributes, the attribute change is the result of the operating system reading the files from read-only media. To make these files Read/Write you will need to change their attribute using Windows Explorer. See Windows Help for information on changing file attributes.

Portability Tip:

While data can be stored to CD or DVD, with the low cost of external hard drives we recommend that data be stored to an external drive for easy portability.

Moving the Library

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

Follow these instructions when you need to move a Library and all it contains to a new location on a network or local hard drive.

Note:

Only DocuXplorer Enterprise and Small Business, the multi-user editions, allows DocuXplorer data to exist on a drive not physically attached to a workstation running DocuXplorer

To move the Library and default data directory to a new server with Enterprise or Small Business:

- Close down DocuXplorer on all users workstations
- Uninstall the Sybase Advantage Database
- Remove the Share from the existing DXDOCS folder
- Select the drive you want as the new Library location and copy the DXDOCS folder and all its subfolders including the DXLIBRARY
- Create a new Share and set security. Make sure you have full access to the \DXDOCS folder through a Network Share with full permissions for all users. When creating the network Share, click the Permissions button and give Everyone Full Control then click Apply. Next, click the Security button and make sure the Administrator and System accounts have full control rights.
- On the new server run the install in the DXDOCS/DXInstall Folder and install the database
- At each workstation reset the Mapped Drive setting to point to the new Share
- Open DocuXplorer
- From the Library Connection dialog box select Connect to Library
- Click on Properties and change the Connection Path setting to the correct location for the DocuXplorer Data Files

Enterprise and Small Business users note:

When a Library is moved to a new server the Server Software must be installed to the new server.

The Server Software can not be installed to two servers at the same time - you will need to uninstall the Server Software from its original location and use the DocuXplorer Install to reinstall the Server Software to the new location.

Professional and Personal users note:

The Library must be relocated on a drive attached to the computer running DocuXplorer.

Note:

DocuXplorer supports only one Library per installation. Do not create additional Libraries as this may cause the program to malfunction. Any technical support or data repair required when DocuXplorer is misused in this way will require paid Level 3 Technical Support.

Restore specific documents from a backup

This Help topic refers to the following editions:
☑ Enterprise ☑Professional

With this process you can restore specific documents from a backup to a live production Cabinet without losing any of the work done since the backup was completed. Follow these instructions to restore specific documents from a backup to a Library.

Glossary of Terms used:
Production Library or Cabinet: the Cabinet that represents your current information in the DXLibrary folder of DXDOCS or the location you assigned to the DX Library.
Backup Library or Cabinet: A Library or Cabinet that has been restored from a backup to an alternate location.

Create a separate DocuXplorer environment to Restore from a backup or Browse a library from a previous version of DocuXplorer
1. To Restore a Document or set of Documents from a Backup library, you will first have to create a Restore location for the DXLibrary (separate from your production library), and an instance of the DocuXplorer Application (also separate from your production Application environment)
2. Create a folder named Restore in the same Folder as your DXDocs folder.
3. Within the Restore folder, create a folder called DXLibrary
4. Within the Restore Folder, copy the entire DocuXplorer Folder located in your \\SERVERNAME\DXDocs\DXinstall Folder
5. Restore the files needed from your Backup to the DXLibrary Folder that was created.
6. Open the DocuXplorer folder that was copied and double click DocuXplorer.exe.
7. Within DocuXplorer, click File < Connect/Create Library
8. Click "Properties"
9. Change the "Library Connection Path" to the new DXLibrary location, which would be \\SERVERSHARE\Restore\DXLibrary
10. Click Save & Close
11. Log into DX as Administrator
12. [Following steps are to create a new cabinet, copy the required documents into the new cabinet, detach the cabinet, reattach the cabinet to your production Library, and moe the Documents into the proper locations]
13. Right click on the Library in the left pane at the top of the DocuXplorer Library Hierarchy.
14. Choose "Create Cabinet"
15. Rename the Cabinet to "Restore" by right clicking the Cabinet and choosing to Rename.

16. Navigate to the documents in the Library that you would like to restore.
17. Right click the Document(s) and click copy
18. Navigate to the Restore Cabinet and choose to Paste the Documents into a Folder.
19. Once you have copied all Documents to be Restored, right click on the "Restore" Cabinet and choose Properties
20. Note the Database ID in the "General" tab which will have the format of CAB######## such as CAB2015923144057, for example.
21. Close the window.
22. Right click on the "Restore" cabinet and choose "disconnect cabinet"
23. Close DocuXplorer
24. Navigate to the \\SERVERSHARE\Restore\DXLibrary folder
25. Search for all files in the folder that begin with the Database ID you have recorded.
26. Move those files into your production DXLibrary location's temp folder, which will be \\SERVERSHARE\DXDocs\DXLibrary\temp
27. Open your production DocuXplorer application, located in \\SERVERSHARE\DXDocs\DXInstall\Docuxplorer
28. Log in as Administrator
29. Right click on the Library at the top of the DocuXplorer Library Hierarchy in the left pane
30. Choose "Connect Cabinet"
31. Navigate to \\SERVERSHARE\DXDocs\DXLibrary\temp (be sure to open the folder under your server's network share, not the local drive letter)
32. Choose the "Restore" Cabinet
33. Once the Cabinet is connected, move your documents into the proper locations in your production library.
34. Once the Restore Cabinet is empty, delete the Cabinet by right clicking and choosing "Delete"

Sybase Advantage Database, user expansion instructions

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

Adding concurrent user licenses to your DocuXplorer system will occasionally require you to expand the server software to allow additional concurrent users.

To expand the server software:
- On the server stop the Sybase Advantage Server Software from running as a service
    - Click on the Start button of the operating system
    - Select Programs/Administrative Tools/Services
    - Right click the Sybase Advantage service and select "stop"
- From the server run the file C:\Program Files\Advantage x.x\Server\adsstamp.exe
- Follow the on-screen instructions for Licenses and enter the newly provided validation code
- After the Advantage service is restarted you must reconfigure server resources. Click the link to see instructions on **Configuration of Server Resources**
- Follow these directions If you have changed your user count for the Desktop Client
- From any desktop client select Help | Product Registration | Activate
- Follow on screen instructions, You only need to perform this at one workstation

Tip:

If the Sybase Advantage Server does not automatically start after entering the expansion code, follow the same steps you took to stop the service and choose "start"

The following are instructions from the Sybase Advantage Database program help on expanding users for an Advantage Database.

A utility is provided, adsstamp.exe, that allows upgrades and expansions of the Advantage Database. The upgrade functionality is useful for upgrading to a new maintenance release (i.e., a new .x release) of the Advantage Database without having to re-run the Advantage Database installation program. The expansion functionality is useful to expand the Advantage Database to a greater number of users (given a new validation code) without having to re-run the Advantage Database installation program. This utility also allows the ANSI/OEM collation

language and other product information that is currently being used by the Advantage Database to be modified.

For best results, while using a computer running a Windows operating system, run the adsstamp.exe utility from the directory in which the Advantage Database is installed. For example, if the Advantage Database Server is installed in the e:\Program Files\Extended Systems\Advantage 8.x\Server directory, change your current directory to e:\Program Files\Extended Systems\Advantage 8.x\Server and run adsstamp.exe.

Important Note: Stop or unload the Advantage Database before running the adsstamp.exe utility.

Moving Your Library to a Different edition of DocuXplorer

This Help topic refers to the following editions:
☑ Personal ☑ Small Business ☑ Professional ☑ Enterprise

Before you can register for a different edition of DocuXplorer you must first move your library data. This is mandatory because your library needs to be licensed for the DocuXplorer edition you intend to choose.
The following procedures explain how to move your library depending on the product edition you wish to use:

To Move Your Library from the Enterprise or Small Business edition to the Personal or Professional edition
1. While connected to your Library, select Help | Product Registration | Copy your Activate ID and select Deactivate
2. Exit DocuXplorer.
3. Install DocuXplorer on your laptop (See Personal or Professional Installation)
4. Move the DXLibrary folder from your server to: **C:\DXDocs\DXLibrary**
5. Start DocuXplorer. When prompted select "I am a registered user" and enter your Activate ID and select Activate then Close.
6. Click **OK** if an error message indicates DocuXplorer could not locate your DXLibrary.
7. When you are prompted by the DX Library Connection dialog box, select **Connect to Library** and then click, **Save and Close**.

Note: If you decided to place your library data in another location other than the default location, then select **Properties**, change the **Connection Path**, and click **Save and Close**.

To Move Your Library from the Personal or Professional edition to the Enterprise or Small Business edition
1. While connected to your Library, select Help | Product Registration | Copy your Activate ID and select Deactivate
2. Exit DocuXplorer.
3. Install DocuXplorer on your server and workstation (See Enterprise Installation - Network Install)
4. Move the DXLibrary folder from your laptop to: **?:\DXDocs\DXLibrary**
5. Start DocuXplorer. When prompted select "I am a registered user" and enter your Activate ID and select Activate then Close.
6. Click **OK** if an error message indicates DocuXplorer could not locate your DXLibrary.
7. When you are prompted by the DX Library Connection dialog box, select **Connect to Library, Properties**, and change the *Server Name* and *Servers IP Address* to a blank value.

8. To test your access to the server: change the *Connection Path* to the location of your data and select **Test Connection**. <u>Note:</u> DocuXplorer will automatically fill in the *Server Name* and *IP Address* for you.
9. Click, **Save and Close**.

Uninstall DocuXplorer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To completely uninstall DocuXplorer and delete all data stored in the program requires 3 steps:

Step 1 – Uninstall Application files
- Use the Windows Uninstaller from the Program Add/Remove Item in the Control Panel
- Select DocuXplorer and click Add/Remove

Step 2 – Delete Document Data
- Open Windows Explorer
- Select and delete the DXDOCS Folder from either the local or network drive

DocuXplorer is now completely uninstalled from you computer.

Troubleshooting

PDF does not display in Document Viewer

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

If PDF documents do not display in the document viewer it is possible that Adobe Acrobat is not set to allow display of PDF in a browser.

To set Acrobat to display PDF in a browser in Acrobat 7:
- Go to Edit/Preferences
- Select Internet from the Categories
- Check the box for "Display PDF in browser".

Configuration of Database Resources

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

To properly run DocuXplorer you will need to set a default number of connections to the server database based on the number of users and Cabinets in your Library.

You can find the Configuration Utility in the DXEInstall folder created on your network server -?:\..\DXInstall\ADS\DXADSConfiguration.exe.

Note: This utility should only be run from the server and all DocuXplorer users must have the DocuXplorer client software on their workstations closed.

DocuXplorer uses the award-winning Sybase Advantage Database as its DX Server software. As always, our focus at DocuXplorer is taking complicated technical functions and making them accessible to the average computer user. Setting up a database server is often a highly technical operation requiring trained database administrators or IT Consultants. We have simplified the task of installing the database software to your network server by providing you with our exclusive DX Server Configuration Utility. The DX Server Configuration Utility is designed to automatically configure the Sybase Advantage Database for use with DocuXplorer. It will provide you with all the information and access required to fine tune the database for optimal performance.

To set the Server Configuration enter the appropriate data into the User Settings fields.

User Settings:

Number of licensed users

Maximum of number of open Cabinets for a user - the maximum number of open Cabinets refers to the number of DocuXplorer Cabinets that you expect a user to have open on their desktop at the same time.

Server Configuration - these items are view only. Entries are determined by the User Settings entered:

*Number of Connections - This is the maximum number of connections that can be active on the Advantage Database Server at one time. Connections are defined as follows:

- For Advantage DOS-based applications, a "connection" is defined as a single application connected to the Advantage Database Server.
- For Advantage 16-bit Windows applications, a "connection" is defined as a single application connected to the Advantage Database Server.

Additional "connections" to the Advantage Database Server via calls to the Advantage "connect" API can be obtained.

- For Advantage 32-bit Windows applications, a "connection" is defined as a single application connected to the Advantage Database Server. Additional "connections" to the Advantage Database Server can be obtained via calls to the Advantage "connect" API, using an Advantage connection component, or using an Advantage connection object

For example, to minimize memory usage, if you are licensed for 100 users, but have only 75 connections, you can save a small amount of memory by configuring the number of connections to 75. Or, if you are licensed for 20 users but have 3 Advantage applications running on each workstation, the number of connections should be set to at least 60.

*Number of Work Areas - the maximum number of work areas that can be in use at one time. This number is the total sum of all work areas being used by all clients. Each client connection is limited to a maximum of 250 work areas. A work area is a logical "container" that consists of a single open table, an optional memo file, and up to 15 index files. The Number of Work Areas configuration setting on the Advantage Database Server is a per-client setting. That is, one work area must be available for each table opened by every client. For example, if five Advantage clients have opened 10 tables, there must be at least 50 work areas configured on the Advantage Database Server. It does not matter if those 10 tables are the same tables, or if they are completely different tables.

*Number of Tables - This is the maximum number of distinct tables that can be open at one time. This number cannot be larger than the number of configured work areas. However, due to the sharing of file handles, this number can be less than the number of work areas.

The "Number of Tables" configuration setting on the Advantage Database Server is a per-server setting. That is, one table setting must be available per table opened, no matter how many clients have that table open. For example, if 5 Advantage clients have opened the same 10 tables, there must be at least 10 tables configured on the Advantage Database Server. Thus, the "Number of Tables" configuration setting differs from the "Number of Work Areas" setting: in that, the "tables" setting is the number of tables opened "per server" and the "work areas" setting is the number of tables opened "per client".

If an Advantage application attempts to open a table on the Advantage Database Server that has not yet been opened by any Advantage application, and the configured number of tables has already been opened, the Advantage application that is attempting to open that table will receive a 7005 error, Maximum number of tables exceeded, until a table "element" becomes available. For example, if the Advantage Database Server is configured for a maximum of 50 concurrently open tables, 50 distinct tables are already

currently open with the Advantage Database Server, and a new or existing Advantage application attempts to open a table that has not yet been opened by the Advantage Database Server, that table open request will fail with a 7005 error.

*Number of Indexes - This parameter directly relates to the maximum number of distinct index files that can be open at any one time. As with Number of Tables, you can save memory by setting this default to match the actual number of open index files.

The "Number of Index Files" configuration setting on the Advantage Database Server is a per-server setting. That is, one index file must be available per index file opened, no matter how many clients have that index file open. For example, if 128 Advantage clients have opened the same 14 index files, there must be at least 14 index files configured on the Advantage Database Server. Thus, the "Number of Index Files" configuration setting is similar to the "Number of Tables" setting: in that, both settings are the number of files opened "per server" and not the number of files opened "per client".

If an Advantage application attempts to open an index file on the Advantage Database Server that has not yet been opened by any Advantage application, and the configured number of index files have already been opened, the Advantage application that is attempting to open that index file will receive a 7006 error, Maximum number of index files exceeded, until an index file "element" becomes available. For example, if the Advantage Database Server is configured for a maximum of 50 concurrently open index files, 50 distinct index files are already currently open with the Advantage Database Server, and a new or existing Advantage application attempts to open an index file that has not yet been opened by the Advantage Database Server, that index file open request will fail with a 7006 error.

*Number of Data Locks - this is the maximum number of record locks, table locks, implicit header locks, and implicit index locks that can be in effect at one time. It may not be necessary to change this parameter. For a frame of reference, check the Advantage Management Utility for the Max Used number. Increase this parameter only if Data Locks have been rejected.

The "Number of Data Locks" configuration setting on the Advantage Database Server is a "per-client" setting. That is, one data lock must be available per record, table, header, or index lock requested per Advantage client. For example, if 10 Advantage clients each have 15 records or files locked at one time, there must be at least 150 data locks configured on the Advantage Database Server.

If an Advantage application attempts to obtain a record, table, or index lock, and the configured number of data locks have already been used, the Advantage application which is attempting to get the lock will receive a 7007 error, Maximum number of locks exceeded, until a lock "element" becomes

available. For example, if the Advantage Database Server is configured for a maximum of 5000 concurrent data locks, 5000 data locks are already in use by the Advantage Database Server, and a new or existing Advantage application attempts to lock a record, table, or index, that lock request will fail with a 7007 error. Data locks take very little memory. Setting this value to a very high number should not require much server RAM to be used.

*References: Sybase Advantage Program Help

Server

Server Name - the name of the server running the DX Server software

Service Name - the name of the service running in the operating system

Tip:

If you already have programs running the Sybase Advantage Database make sure that the configuration suggested by the Configuration Utility does not lower the numbers allowed below your original settings.

You can see more information about server configuration in the Sybase Advantage Database help program.

Data Locks

This Help topic refers to the following editions:
☑ Enterprise ☑ Small Business

Data locks determine how many documents within a folder and its sub-folders can be moved at the same time. The default number of data locks in DocuXplorer is 254.

To increase the number of data locks allowed the administrator will need to use the Advantage Configuration Utility which can be found on the server hard drive in the ?:\Program Files\Extended Systems\Advantage\Server.

Run the file ADS_CFG.exe and go to the Configuration Utility Tab

Increase the number entered into the Number of Data Locks file.

Tip:

Increasing the number of data locks increase the amount of system memory used by DocuXplorer. To keep your system running efficiently do not increase the number of data locks beyond your actual need.

Restore a damaged Index Set

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

If an Index Set gets damaged the result could be an inability to view documents associated with that Index Set or if you are unable to get to a property of a field. To restore the Index Set and regain access to those documents or the field properties use one of the two following methods.

Restore an Index Set from a backup
1. Close DocuXplorer on all workstations
2. Use Windows Explorer to view your DXLibrary folder
3. Make a backup copy of the following files
    1. LIB00000000000000xFieldDef.ad
    2. LIB00000000000000xFieldDef.ad
    3. LIB00000000000000xFieldDef.adt
1. Restore these same files from a backup prior to the damage having occurred, overwriting the existing files
2. Open DocuXplorer on a single workstation, do not open any Cabinets or you will need to restart the restore process
3. In the Library Work Folder, Document List View, one at time, select the Index Sets to be repaired from the Index Set drop down list
4. From the Column Header Bar, in each Index Set to be repaired, change the size of any column in the Index Set. This will update the Index set's "Create Date" allowing DocuXplorer to synchronize the existing Cabinets with the restored Index Set
5. Once all the Index Sets have been updates, open your Cabinets to verify the repair

Manually Rebuilding an Index Set
1. Open DocuXplorer on a single workstation, make sure all other workstations have DocuXplorer closed
2. Copy a documents associated to the affected Index Set to the Library Work Folder
3. Close all documents and Cabinets
4. Highlight the Library Work Folder and select <Index Set Tools> from the Toolbar
5. In <Index Set Tools> select <Manage>
6. Right click the Index Set to be rebuilt and select <Reset Filed Properties> from the menu
7. Click the <Yes> button in the warning dialog
8. Right click the Index Set to be rebuilt again and select <Reset Display Properties> from the menu

9. Click the <Yes> button in the warning dialog
10. Close the Index Set Manager dialog and press F5 to refresh the Document List View Window
11. From the Index Set drop down list select the affected Index Set. You will notice that the original defined columns are not displayed, do not worry the data entered into those columns is intact and will be available upon completion of the rebuilding process.
12. Right click the document you copied to the Library Work Folder at the being of this process and select <Open Document Viewer>
13. Right click in the area below the Subject Field, from the pop-up menu <Show><Show All Fields>
14. Make a list of all the fields that contain data
15. Close the Document Viewer
16. In the Document List View, right-click the Column Header Bar to bring up a menu and select <Add Fields>
17. Add the fields with data that you had listed be dragging them up to the Column Header Bar
18. On the Column Head Bar right-click each newly added field and select <Field Properties>
19. Modify each field's properties to reflect the display names and settings prior to rebuilding the Index Set

Inoperable Data Input Editors

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

If a data input control editor does not work, make certain you have the **riched20.dll** file in the Windows\System or WINNT\System32 folder. If it is missing copy the file to the appropriate folder.

Print Driver installation error

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

 You must be an Administrator for the workstation to install the DocuXplorer Print Driver.

To install as an administrator:
- Right click the print driver file to be installed and select <Run As>
- Then select "Administrator" and the enter the administrator password
- Click < Ok> to continue.

Document Attachment does not open

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

If a document attachment does not open with a double click try exporting the document attachment to a Windows Folder using the <u>Send To</u> command and opening it from Windows Explorer.

 If the document still will not open you will need to use the document's native program to locate the exported document and open it. If the document does not open using Windows Explorer the issue is with the document's native program not DocuXplorer.

Login Disabled

This Help topic refers to the following editions:
☑ Enterprise

The Login Disabled error appears after a user has attempted to Login via the Internet and exceeded the number of failed access retries allowed.

The maximum number of Login attempts allowed is set in the Tools/Option/Library item under Library Access/Enable Internet Access

Anti-Virus Software Auto-Protect

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Exclude all DocuXplorer database files from your Anti-Virus Software auto-protect process. If the DocuXplorer database files are not excluded, database errors may occur.

Exclusions specify the files that should not be scanned by file name extension or by specific file name.

 File extensions to exclude are .ADT, .ADM, .ADD, .AI, .AM .ADI and .TMP.

Automatic Update Process Fails

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

Automatic Update process fails using Windows XP, 2000, or 2003 operating systems.

When the automatic update process fails make sure you have excluded DocuXplorer from local fire wall settings via <Control Panel><Windows File Wall><Exceptions> "Add Programs" select DocuXplorer.exe

Developer's Only Help Area

DocuXplorer API Overview

This topic refers only to program developers

Application Programming Interface

DocuXplorer's application programming interface (API) provides system integrators a quick and simple way to automate the process of adding and finding documents with DocuXplorer. As a prerequisite to understanding the terms used in this document you must have a full understanding of DocuXplorer's menu commands, storage hierarchy and Index Sets as described in the product documentation.

Free e-mail support does not cover programming assistance for the API. Support for the API requires purchase of Level 2 Technical Support.

How DocuXplorer accepts instructions

DocuXplorer accepts commands via an INI formatted file with the extension of .dx. Once the file is created it can be executed directly via Windows Explorer or using any programming language via the operating systems shell command. DocuXplorer automatically associates the .dx file extension once the DocuXplorer client has been installed on a workstation or server. DocuXplorer also supports the execution of the .dx file via a COM interface allowing for greater control.

DocuXplorer COM interface

DocuXplorer's COM interface provides the same functionality as the .dx file format but enables you to execute your .dx files and wait for a process to complete. This limits the need for you to monitor the .dx file directly to execute a series of additional commands. The COM interface is as simple as the .dx file execution and can be called by any programming language that supports COM programming. To start the process you'll need to create the COM Object via the DocuXplorer Class name of "r;DocuXplorer.DXApplication" once established you then call the method ProcessCommandFile. ProcessCommandFile takes a single string argument representing a .dx file name. Sample .dx files and Delphi programming examples are provided in the API templates folder located in your DocuXplorer install folder.

DocuXplorer Web interface

DocuXplorer's Web interface supports the same functionality as the .dx file format but enables you to execute these commands via the browsers query string aka URL. All command should enter in lower case. At this time only the [FindDocument] commands are supported.

Here is an example of a full text search request:

http://localhost/docuxplorer/finddocument?userid=administrator&password=admin&langid=1033

&dxsearchdocument=0&hidecriteriaonexecute=0&hidemenuonexecute=0&opendocumentonexecute=0

&querytype=FullTextSearch&dxcabinet=Library&dxindexset=All Documents

&command0=jelly*

DocuXplorer .dx command file

The DocuXplorer .dx file uses the section names as describe in the item "r;The INI File format". This instructs DocuXplorer as to what actions are to be performed. You will notice that these commands match DocuXplorer's menu interface and performs these functions in a similar manner. Under each section name contained in the .dx file are key name value pairs. These key name value pairs are used to control aspects of the section name commands. For example the section name command that controls DocuXplorer's ability to show or hide the DocuXplorer desktop.

[ShowHideDesktop] // Section Name Command
ShowDesktop=1 // Key Name and value pair

If a section name command needs to be executed more than once within a .dx file, the section name command should be adjusted to include a two digit value at the end of its default name in order to make each section name unique.

For Example:

[AddDocument00]

Key Names

..

[AddDocument01]

Key Names

..

It's important to remember that all section name commands are executed with the same restrictions as imposed by the administrator within the DocuXplorer interface. If a user is restricted from a command such as Export a document, the command will fail and the error will be logged in the .dx file. More details on this topic are covered in the "r;Special Key Names" portion of this help topic.

Listed below are 9 section names commands and their descriptions.

AddDocument: This command provides control over user interaction with DocuXplorer when adding documents.

FindDocumentDialog: This command allows you to display the Find Documents Dialog Window.

FindDocument: This command allows you to pre-populate the Find Document Dialog with the result of a query.

SendToDocument: This command allows you to query for a group of documents and execute any of the Documents SendTo options.

ExportDisplay: This command allows you to query for a group of documents and then execute the Export Display option.

DeleteDocument: This command allows you to query for a group of documents and then execute the Delete Document.

ShowDocument: This command allows you to show a specific document stored in DocuXplorer. DocuXplorer creates these files for a user to create DocuXplorer [LinkFiles](#) to email other users or to be placed on a hard drive. You can create these files via the SendToDocument command.

ShowHideDesktop: This command allows you to show or hide the DocuXplorer desktop.

CloseDocuXplorer: This command allows you to close DocuXplorer. To determine if DocuXplorer is running we suggest that you use Microsoft API command FindWindow('DocuXplorer', nil);

Key Name Value Pairs

Key name value pairs are comprised of a defined key name, an equal sign, and a value. The value can be numeric or text. For each key name defined below we'll use the following standard format to define the expected value parameters.

Basic Key Names

Key name pairs are used within each section name command. Key name value pairs, enables you to control the DocuXplorer interface and user interaction. There are 2 basic keys names that can be used for all section

name commands. All other Key names are described in their respective sections in this document.

ShowInterface = # [1, 0]

When the value is set to 1, the user is shown the typical user interfaces for the selected section name command. When the value is 0, the typical interface is hidden from the user. The only exception to this rule is when a key name value pair is expected but not assigned. When this occurs, the interface for the selected section name command is displayed so the operation can be completed by the user. If there is no interface support for the unassigned key name value pair an error is raised.

ShowError = # [1, 0]

When the value is 1, it enables the user to see any error message, such as security restriction warnings, When the value is 0, a error message is logged in your .dx file and not seen by the end user. Read the section "r;Special Key Names" below for more details on this topic.

Special Key Names

Once DocuXplorer has completed the execution of the .dx file two special key names are added to each section name command group.

ErrorCode = # [1, 0]

When the value is 0, the section name command was executed without any errors. If there was a failure the value 1 would be set. When the value is 1 the key name "r;ErrorMsg" displays the text in which the user would had seen if the key name ShowError was set to 1. In the event a user cancels an operation like not saving a document during a Add Document command the ErrorCode would be 1 and the ErrorMsg would contain the message "r;Operation aborted'

DocuXplorer API instructions

This topic refers only to program developers

Creating Section Name Commands

There are 9 section name commands. Each will be discussed below along with the key name value pairs to control the command.

[AddDocument]

Add Document is a section command name that enables you to execute the Add Document interface and control the process.

DocumentSource = # [1, 2, 3, 4, 5]

1 = Scanner or Camera: start the process of scanning a document with the twain interface

2 = QuickScan: same as above but without the twain interface

3 = Index Only Document: starts the default DocuXplorer viewer without the requirement of a file

4 = Import Document: prompts the user for a file if the key Name DXFileName is not assigned a value

5 = Import Document: Does not prompt the user for a file and assumes the key Name DXFileName is a assigned a value, If a file is not assigned or found a document record will not be entered but any supporting Cabinet, Drawer, Folder will be created to support the entry

DXCabinet = s ex. My Cabinet

This represents the name of the Cabinet the document is to placed in. If the Cabinet does not already exist one is created automatically

DXDrawer = s ex. My Drawer

This represents the name of the Drawer the document is to placed in. If the Drawer does not already exist one is created automatically

DXFolder = s ex. \.Work Folder\My Sub Folder

This represents the name of the Folder the document is to placed in. If the Folder does not already exist one is created automatically. You can define sub folders by using a back slash \ as a delimiter ex. (folder\sub folder\sub folder).

DXFileName = s ex. C:\My Documents\My Docment.tiff

This represents the name of the file to import. File names must include the location to the file. The location can be formatted as a Drive and

Path or UNC paths. Ex. C:\My Documents\My File.txt or \\My Computer\My Documents\My Document.txt

DXIndexSet = s ex. All Documents

The represents the name of an Index Set. This value must exist or an error will be raised.

ShowInterface = # [1,0]

This determines if the Document Viewer dialog is shown for data when only a single document is being added. The default value is 1

1 = Show Document Viewer

0 = Hide the Document View

To allows for multi-line of text convert CRLF (Carriage line feeds) to '/n'. They will be convert back to CRLF automatically when posted to a field.

To populate Index Set fields with values, create Key Names that match the Display Name property of the defined DXIndexSet Key Name ex. (Subject=My document subject).

You can also create your own Auto Index values by creating Key Names that are surrounded by open and closed braces ex. {MyAutoIndexValue}=My Value. This can be helpful when you need to assign Index Set values but don't know the display name column that requires it. See the help item "Auto-Indexing Variables" for more details on how to control this powerful programming feature.

To support adding multi-line text to memo fields, use the "UserVar"# Key Name. For example, UserVar1="my very long memo" UserVar2="my other very long memo"

[FindDocumentDialog]

This section name command shows the Find Document dialog, no key names are needed and no return values are set

[FindDocument]

This section name command allows you to pre-populate the Find Document Dialog with the result of a query.

QueryType = s [FullTextSearch, SearchByField]

This represents the type of query to be defined just as you would within the DocuXplorer interface by selecting the tabs on the top of the screen.

DXCabinet = s ex. My Cabinet

This represents the name of an existing Cabinet in which to locate documents

DXIndexSet = s ex. My Documents

This Key Name is required when the QueryType is set to "FullTextSearch". It represents a value for the interface item "Default Index Set Used to preview results"

DXSearchDocument = # [0, 1]

This key name is required when the QueryType is set to "FullTextSearch". When the value is 1, it represents a checked value for the interface item "Included document content is search". When the value is 0 the item is unchecked.

HideCriteriaOnExecute = # [0, 1]

When this value equals 0 the criteria defined for the find process is shown to the user. When the value is 1 it is hidden.

OpenDocumentOnExecute = # [0, 1]

When this value equals 1 and only a single document matches the query, the document will open in the Document viewer. When this value is 0 just the result of the query is displayed in the Query List View.

Command0 = s ex. Invoices and Contracts

When the key name QueryType is set to "FullTextSearch" This value represents the user criteria as they would enter it in the Find Document interface.
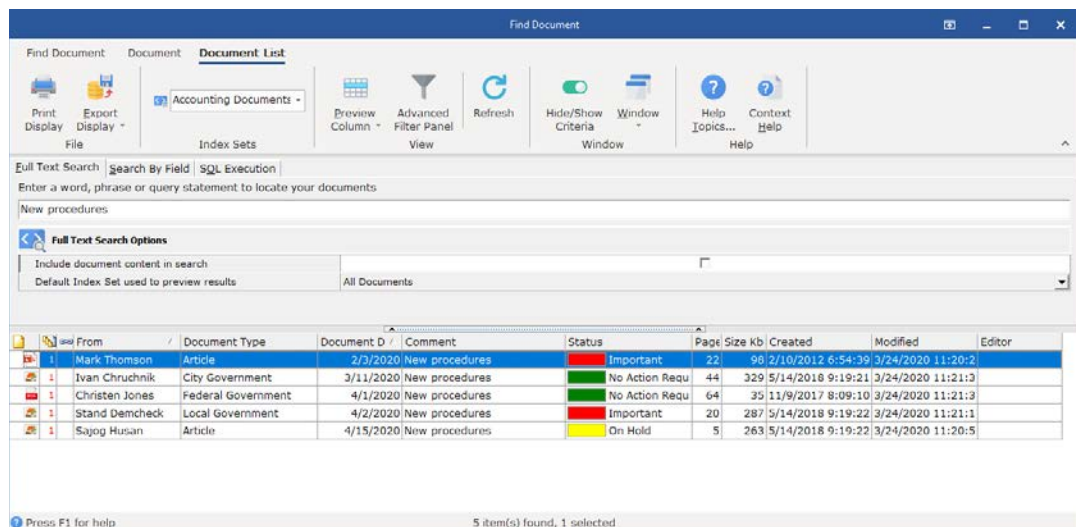
When the Key Name QueryType is set to "SearchByField" This value represents the user criteria as they would enter it in the Find Document interface but in a comma delimited list ex.

Command0="1","(","All Documents","Document
Type","Contains","Invoice","And",")"

Command1="2","(","All Documents","File
Type","Contains",".tif","And",")"

Etc...
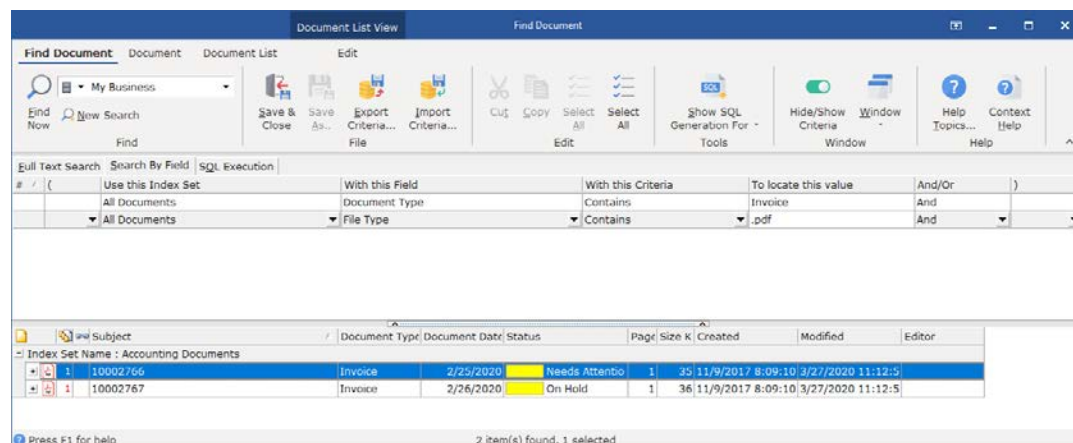
[SendToDocument]

This section name command allows you to query for a group of documents
and execute any of the Documents SendTo options. The SendToDocument
command uses all the same key names value pairs as the [FindDocument]
command but adds the following keys names to control the SendTo
interface.

SendToOption = # [0, 1, 2, 3, 4, 5]

The key name SendToOption takes a single numeric value between 0
and 5. This represents the 6 SendTo options for a document within the
DocuXplorer interface. The document file names are predetermined by
the Index Set settings. See help item Index Set Properties for details
on this topic.

0 = Exports the documents in their native format to a Windows folder

1 = Converts the documents via the default print driver type (PDF or
TIFF) and exports them to a Windows folder

2 = Converts the documents to DX Link file and exports them to a
Windows folder

3 = Emails the documents in their native format

4 = Converts the documents via the default print driver type (PDF or
TIFF) and e-mails them

5 = Converts the documents to DX Link files and e-mails them

MergeDocumentName = any valid file name with no file extension

This key represents the file name used when one or more documents are merge together. If the file name is blank or the key is not included in the .dx file this feature is not executed.

PageCount = <Leave Blank>

This key will be populated by Docuxplorer indicating the total pages for all documents found. If this key is not included in the .dx this feature is not executed.

TargetDir = s ex. C:\My Documents or \My Computer\My Documents

This key name represents the location where the exported files are to be placed. The TargetDir can be formatted by a Drive and Path or UNC path. An error will be raised if the TargetDir does not already exist. This key name is required when the SendToOption equals 0, 1 or 2.

The following key names are required when the SendToOption equals 3, 4 or 5. An error is raised if the EmailToRecipients, EmailSubject or EmailMessage is not assigned.

EmailToRecipients = s ex. sale@domain.com; accounting@domain.com etc...

This key name represents the recipient's email address. The EmailToRecipients contains address list separated by semicolon.

EmailCcRecipients = s ex. same format as EmailToRecipients

This key name represents recipients to receive a carbon copy of the email. The EmailCcRecipients contains address list separated by semicolon.

EmailBccRecipients = s ex. same format as EmailToRecipients

This key name represents recipient's to receive a copy of the email with their names hidden from the other recipients. The EmailBccRecipients contains address list separated by semicolon.

EmailSubject= s ex. My Email Subject

This key name represents a short description to populate the Subject of the email

EmailMessage= s ex. My Email text body

This key name represents the long description to populate the Body of the email. To create line breaks add the text /n

[ExportDisplay]

This section name command enables you to perform the export operation available to user when they select File Export Display from the Find Document interface. The ExportDisplay command uses all the same key names as the [FindDocument] command but adds the following keys names to control the ExportDisplay interface.

FileName = s ex. C:\My Documents\My Document List.html

The key name should include the full drive and path. The file extension determines the format to which the display is saved. The supported extensions are html, xml, htm,cvs and xls.

ExpandRows = false, e.g. (True, False)

This key value determines if version and event history, if available, should be included with each document.

[DeleteDocument]

This section name command enables you to perform the Delete operation available to a user when they right-click a document and select Delete. The DeleteDocument command uses all the same Key Names as [FindDocument] and has no additional Keys names to control the DeleteDocument interface.

[ShowFolder]

This section name command enables you to control the select a folder in the library tree view

FolderIDPath = root,0,19

The key value represents the folder ID's in comma delimited format of the path of the folder location

[ShowHideDesktop]

This section name command enables you control the ability to show or hide the DocuXplorer Desktop.

ShowDesktop = # [0, 1, 2]

This key name has three settings, when set to 0, the Desktop is Hidden, When set to 1, the Desktop is Visible and when set to 2, the Desktop visibility is toggled between 0 and 1 based on the current state.

[ShowPopupMessage]

This section name enable you to send a popup message to the screen

Message = <Any Text>

This key should contain the message you whish to display. To allows for multi-line of text convert CRLF (Carriage line feeds) to '/n'. They will be convert back to CRLF automatically when displayed.

[CloseDocuXplorer]

This section name command enables you to close DocuXplorer. If your programming with the COM interface, just free the DocuXplorer Object, do not execute this command.

[ImportEngine]

This section name command allows a developer to start an Import Job from outside DocuXplorer. For example starting an import via the Microsoft Task

Scheduler. See the Microsoft Support web site at
http://support.microsoft.com for information on "Task Scheduler".

RunContinuously = # [0, 1]

> When this value equals 1 the selected Import Job will run
> continuously. When this value is 0 the selected Import Job will run
> once.

JobName = My Job Name

JobName2 = My Job Name 2

> This key name represents the name of the import job defined in the
> Import Job interface, multiple JobName items can be add but each
> must end with an unique value.

Glossary

Attachment

This Help topic refers to the following editions:

☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Documents in DocuXplorer are comprised of index information and an attachment. The attachment can be either an image or an electronic computer file. Each attachment type uses its own document viewer. A document viewer can be either the DX Image Viewer or the Associated Application Viewer. All attached images are viewed in the DocuXplorer Document Window using the DX Image Viewer. An electronic computer file can be viewed in preview in the DocuXplorer Document Window and uses the Associated Application Viewer. Double click an Associated Application Document and it will open using its native source program as registered in the operating system.

Cut Text

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To cut text from a field:
- Highlight the text to be cut with the mouse
- Click the right mouse button to bring up a menu
- Click Cut

Delete

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To delete a Folder or Document to the Recycle Bin:
- Select the object to delete.
- Choose the Delete key or hold down Ctrl+D or Shift+Del or the icon on the [Icon Toolbar](#) or drag and drop the item to the Recycle Bin.
- Ctrl+D deletes the item and places it in the recycle bin (does not apply to Cabinets and Drawers)
- Shift+Del deletes the selected item and does not place it in the recycle bin

Tips:
- To retrieve deleted files from the Recycle Bin. The deleted file will remain in the Recycle Bin until emptied.
- To delete the item from your computer bypassing the Recycle Bin - hold down the SHIFT key while dragging and dropping the item to the Recycle Bin.
- To empty the Recycle Bin highlight the Recycle Bin in the Library Window and click the right mouse button. click the Empty Recycle Bin command or select the delete button from the menu bar.

Drag and Drop

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑   Small Business

User can Drag and Drop Documents, Folders or text. Select the object, hold the left mouse button and drag the object to its new location.

Tip:

- When dragging a Document or Folder to a new location hovering over an object (Cabinet, Drawer or Folder) will automatically open the object allowing you to navigate to the proper destination.
- DocuXplorer defaults to a limit when copying Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of data locks allowed.
- A user with permission can copy more then 254 documents at a time by highlighting the documents to be moved.

Moving Objects

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

To move an object (Folder, Document, text or annotation):
- Highlight the object to move.
- Click the right mouse button.
- Click Cut
- Highlight the new location.
- Click the right mouse button.
- Click Paste

Or Drag and Drop the object:
- Highlight the object to move.
- Hold down the left mouse button and drag the selected item to the new location.
- When the Drawer or Folder of the new location is highlighted release the left mouse button.

Tip:
- Moving a Folder will move all the documents contained in it.
- DocuXplorer defaults to a limit when moving Folders with Documents. A Folder containing more than 254 documents cannot be moved unless the administrator increases the number of data locks allowed.
- A user with permission can move more then 254 documents by highlighting the documents to be moved.
- To select more than one document to copy, hold down the CTRL key and highlight the items to copy or Shift key for contiguous documents.
- When moving documents between cabinets, DocuXplorer recognizes any changes to the document or its index. You are then given the choice of updating the original document or creating a new document from the edited document.
- You can add a Document to DocuXplorer by moving the document from Windows Explorer. Simply select the document or documents to add and drag and drop them to an open folder on the DocuXplorer Library Tree.

Properties

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Each DocuXplorer object is controlled by a set of properties specific to it.

Object properties can be changed using the Item Properties dialog Box available from the right-click menu of the item.

Refresh

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

This command refreshes the screen display.

Tip:
- Use F5 to initiate this command.
- If you remain in the same folder for extended periods of time you may need to refresh your screen display from time to time to include any documents added by another user on the network during the present session.

Right mouse button

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

The right mouse button is used to bring up a menu that applies to anyplace a user can select an item on the screen. The commands that appear on these "right mouse button menus" are specific to the object you are working with.

Send To

This Help topic refers to the following editions:
☑ Enterprise ☑ Professional ☑ Personal ☑ Small Business

Use SendTo to output a document to a printer or file, or as an email attachment.

On the DocuXplorer Desktop, the right-click menu of a document provides access to the Send To menu.
To send a document use the mouse to select the document. To send multiple documents, use Shift or Ctrl to select multiple documents.

In the Document Viewer, the Send To menu is a submenu of the File menu.

The seven available options are:

Printer Device

This will send the document a printer device for printing. Users will be shown a list of printer devices available. Most often this is the method used for faxing documents as well, the fax driver is one of the listed print drivers.

To Batch Print documents from either a Folder or Query List simply highlight the documents to be printed and use the Send To/Printer Device command.

When printing from the Folder or Query List View annotations are automatically printed on the document. If you wish to print without annotations open the Document Window and use the print function to print without annotations.

Workflow

This assigns the select document(s) to an existing workflow definition

Windows Folder...

This will bring up a Windows Folder Tree to select a folder as a location for the exported documents. The destination folder can be anywhere on a network. The document or documents will be exported in their stored file

type. The export file name as user defined in the Index Set properties will identify the exported file.

Windows Folder As: PDF

This is the same as above but the document will be exported in PDF format. The export file name as user defined in the Index Set properties will identify the exported file.

Windows Folder As: DX Link File

This is the same as above but the document will be exported as a LinkFile. A LinkFile is a pointer to a document in the DocuXplorer desktop client. Clicking on a LinkFile will automatically open DocuXplorer and display the linked document. The exported file name is user defined via in the Index Set property called exported file name.

Windows Folder As: Hyper Link File

This is the same as above but the document will be exported as a hyper Link File. A Hyper Link File is a pointer to a document in DocuXplorer access over the internet. Clicking on a Hyper Link File will automatically open your web browser and display the linked document. The exported file name is user defined via in the Index Set property called exported file name.

Mail Recipient

The selected document or documents will be attached to the email with selected export file name identifying the attachment.

Mail Recipient As: PDF

This is the same as the Mail Recipient but DocuXplorer will convert the document attachment in the email to PDF. The export file name as user defined in the Index Set properties will identify the exported file.

Mail Recipient As: LinkFile

This is the same as the Mail Recipient but DocuXplorer will convert the document attachment in the email to be a LinkFile. A LinkFile is a pointer to a document in DocuXplorer. Clicking on a LinkFile will automatically open DocuXplorer and display the linked document. The export file name, as user defined in the Index Set properties, will identify the exported file.

Tip:

When using the Send To option with PDF and TIF files, the user will be prompted to provide the specific pages to include.

When using LinkFiles the user must have DocuXplorer installed on their local workstation and be able to access the DocuXplorer Library.

Lotus Notes users will need to install the Microsoft MAPI e-mail interface for Lotus Notes.

When Event Logging has been set to enabled a dialog box will appear requesting the name of the recipient(s). These entries provide an audit trail of persons e-mailed the document which can be viewed in the Document Event Log/Field Values text box. Enter the names and click OK to use your default e-mail program to send the document(s). The feature can be turned on in the <Tools><Options><Administrative> dialog box. Check the item Require User Description when e-mailing, printing, or exporting.

Select all

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Select All is used as a shortcut to select all documents in a Folder or text in the a Memo Field.

The keyboard shortcut for Select All is Ctrl+A.

Undo

This Help topic refers to the following editions:
☑ Enterprise ☑Professional ☑ Personal ☑ Small Business

Available only in cut, copy and paste operations dealing with text, this command will undo your last action.

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