FileX User Manual

Guide for Viewing and Manipulating FileX Images
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CHAPTER 1: GETTING STARTED

INTRODUCTION

FileX is a secure digital storage and retrieval tool with a unique combination of ease of use and robust functionality. Data files of a wide variety including TIF, PDF, MP3, Office, and many more can be input into a company designed file structure and retrieved via a customized array of index values. Values can be manually manipulated or imported from a diverse selection of core products making FileX scalable from family size organizations to worldwide corporations.

Users login to FileX using assigned ID's modified to grant the user access to view or modify all or selected portions of the stored data. Login can be via password or via Windows authentication. If Windows authentication has been enabled, FileX will login using the user name used to login to Windows. [Contact the local IT department or Digital Filing Solutions if you have questions about this.]
DOCUMENT TREE

The document tree displays every possible folder and document type that may be created within the user’s storage structure.

1. **Top Level Folders** – folders located in the farthest left side of the document tree. These are the only folders that can be created directly from the tree. Sub folders and document types will be created subsequently within the specific top-level folder and its structure.

2. **Sub Folders** – folders contained within other folders. These are created within previously created folders.

3. **Document Types** – tabs used to contain scanned and uploaded images. They are created within previously created folders.

4. **Links** – folders or documents located in other sections of the tree but referenced here for ease of access. The icon beside them resembles a link of chain.
MENU TABS AND THE FILE DROPDOWN

Menu Tabs – Similar to other Windows based programs, FileX uses a number of tabs organized for easy function access. Only the first of the items along the top is a dropdown, and that is the File Menu dropdown.

File Menu Dropdown –
1. Refresh – refresh screen.
2. Export – get folders and documents back out of FileX either to a PDF file (may or may not be protected by a password) or to XML which stores larger volumes of images in a format useful for auditors or others who need to examine documents but are not given a login to the system. These features are covered in more detail in Chapter 4: Printing and Exporting.
3. Email – send documents and elements to people outside of the FileX system. This feature is covered in more detail in Chapter 4: Printing and Exporting.
4. Print – Several very useful options are available here including the ability to print:
   o An individual document
   o The document tree which is useful for those who will be maintaining the overall tree structure.
   o The results list which will print the current search results list in expanded form so that all sub folders, documents, and elements are included.
   o ToDoList will only be active if “Tracking” is available, and will print the contents of the user’s current ToDoList tab.
5. **Change Password** – allow the user to change password after providing current password credentials
6. **Recent Documents** – display list of currently accessed documents. Clicking on one will re-display it.
7. **Recent Searches** – display a list of recently executed searches. Clicking on one will re-execute it.
8. **About** – display information about current software installation
9. **Help** – accesses online user manual
10. **Alternate Login** – log the user out and return to the login screen. This can be useful if Windows Authentication is enabled, but the user wishes to login as a user other than the matching Windows user.
11. **Log Out** – cause the user to be logged out. Logging out in this way is the same as clicking “X” in the top left corner of the FileX window.
HOME TAB

Displayed here is the **Home** tab. Folders and documents can be managed from here. Note: The ability to perform these functions is dependent upon the individual user’s security access. See the chapter on the [Admin Console](#) for more information on user security.

1. **Create New Item** – create folders and documents can be created within the currently selected location.
2. **Modify Existing Item** – change index values for the selected folder or document.
3. **File Upload** – upload elements from the user’s computer or peripheral device directly into documents.
4. **Clear Results** – clear the contents of **Results** tab and removes the **Results** tab from the screen.
5. **Collapse Tree** – close folders so that only top level folders are visible.
6. **Doc Info** – displays information about the selected folder or document.
7. **Doc History** – not a currently active feature.
CHAPTER 2: SEARCHING

BASIC SEARCH

The Search tab is used to access the search functions of FileX. There are two methods of searching for folders and documents: Basic Search and Advanced Search.

Basic Search – restricts the search to a single index field.

- **Search On** – dropdown used to select index field on which to search.
  - Available index values will vary based on the folder or document currently selected. Loan #, for example will probably not be an available search field on the Accounts Payable folder.
  - **Global Search** causes a search on all available index fields for the selected folder or document. The value entered will be contained within a single index field in the result.
  - **Document #** causes a search on the internally assigned document number given to each folder and document within FileX.

- **Search Criteria** – value on which to search.
- **Search** – button to click to execute search.
- **Last Search** – time of last search.
- **Message** – number of results found.
- **Results Tab** – listed folders and/or documents found as a result of the search.
- **Clear Results** – clear the contents of Results tab and removes the Results tab from the screen.
- **Collapse Tree** – close folders so that only top level folders are visible.

Note: If the desired item is not found, check the Search View on the Preferences tab. For more information on this, see User Preferences.
ADVANCED SEARCH

Rather than searching for the value of a single field, the **Advanced Search** allows for the narrowing of the results based on the values of multiple fields. In addition, there are several features of the **Advanced Search** which are not available in the **Basic Search**.

- **Date Range** – for date fields, double clicking on the title of the field opens a second value window above the original. A beginning date can be entered here and an end date in the lower box to execute a **Date Range** search.
- **Search Non Specific Document Types** – returns all folders and documents with a match on entered index value(s). Otherwise, only folders/documents of the type selected in the tree are returned.
- **Return Items with Elements Only** – returns only documents which have existing elements (scanned or uploaded).
- **Clear Results** – clears the contents of **Results** tab and removes the **Results** tab from the screen.
- **Collapse Tree** – closes folders so that only top level folders are visible.
USER PREFERENCES

There are many options that will customize and simplify each individual user’s experience. They can be found on the Preferences tab, and include the following:

1. **Search Type** – options for how the search function will work. Options include:
   - **Explicit** – locates field values exactly as typed (without respect to case).
   - **Key Word** – locates typed value anywhere within index field.
   - **Wildcard** – locates typed value within index field using asterisk (*) as a wildcard. Note that if the first typed character is not an asterisk, the first typed character will be first in each of the results.
   - **Default To Global** – without this option being selected, search dropdown defaults to the first index field listed. Global Search can always be selected manually. By selecting this option, the “Global Search” is the default, but individual index fields can still be selected from the search dropdown.

2. **Search View** – indicates which files will be searched. Options include:
   - **Active Only** – results include only active folders and documents.
   - **Archived Only** – results include only archived folders and documents (by default these appear red).
   - **Active / Archived** – results include folders and documents that are either active or archived.
   - **Recovery Mode** – results include active, archived, and deleted (blue by default) folders and documents.
3. **Misc Options** – Options include:
   - **Show Doc Description** – displays the document description beside the document name in search results. The description is some combination of field values and may vary.
   - **Use Date Calendar** – displays a popup date calendar for date selection and entry when accessing date fields. If this is not checked, users manually enter dates.
   - **Multi-Select Documents** – allows for the selection of multiple items via check boxes when creating new folders/documents.
   - **Show Advanced Search** – blocks access to the basic search dropdown and takes users directly to the Advanced Search for any search.
   - **Use Large Fonts** – applies to the document tree and the search results.
   - **Use Large Toolbar** – applies to the Image Viewer toolbar.
   - **Remember Selections** – preserves document tree position and tab selection when logging out and back in.

4. **Results Options** – Options include:
   - **Auto Clear Results** – automatically clears search results each time a new search is executed.
   - **View Hidden Fields** – displays index fields/values that have been set as hidden by default.
   - **Hide Element Dates** – hides the create date displayed by default to the right of each element name.

5. **Display Options** – Options include:
   - **Display Working List** – causes the Working List to default to the open position.
   - **Maximize Image Viewer** – causes the Index Information and Working List to collapse by default when an image is being displayed.
   - **Zoom to Center** – displays current image in the center of the Image Viewer rather than flush left.
RESULTS TAB

After a search (Basic or Advanced) has been executed, the results are listed in the Results tab. There may be one or many of the type of folder or document matching the entered search criteria. Each folder may be opened to display sub folders and documents contained within. Each document may be opened to display its elements. Elements are the stored images and files, and may be TIFF, JPEG, PDF, Outlook, Word, Excel, Notepad, MP3, or a host of other types.

In this example, the search was on the Customer Information folder for last names containing “Johns”. This user had Preferences set to Key Word, so two folders were returned, “Johns” and “Johnson”.

Items can be manipulated by using the mouse right click which displays a popup menu of options. Menus vary based on the selection of folder, document, or element. A triangle to the right of a menu item indicates that there is a submenu that will appear if that item is selected. [Note: In some implementations, the triangle will not appear unless the item is clicked on.]

Note: Not all menu functionality will be available to all users. If, for example, a user has View Only access, the “Delete” options will not be active and will appear grayed out.

The number of results returned is capped at some global limit (typically 500). Should there be additional results, an icon will appear beside the results folder which, if clicked on, will show the rest (or the next limited quantity) of items.
RESULTS TAB MENU

Right-click of the mouse on the Document Search folder will display a menu with options including the following:

1. **Remove From List** – remove the current results list from the **Results** tab. It does not affect the items themselves.
2. **Expand All** – expand every folder and document contained within the returned list. This option allows for the easy browsing of the entire contents of a results including all of its folders, sub folders, and documents.
3. **Collapse All** – collapse all documents and folders up to the currently selected item.
4. **Save Search Parameters** – open a title window allowing for the saving of the search for future use. The new search will display in the **Saved Searches** folder on the **ToDoList** which is only available with the **Tracking** module. For more information on **Tracking** and the **ToDoList**, see Chapter 9: Tracking.
5. **Print Specific Barcodes For Results** – print barcode sheets for barcode classifying on batch scans. For more information, see Barcode Batch Scan.
6. **Update Status for Results** – allow for the change of status for all or a selection of documents from the results list to active, archive, or delete. In the example shown, the folders with the checks in the boxes will be changed to archive status when the Submit button is clicked.
7. **Export to XML** – allows exporting folders in bulk – for more information see Chapter 4: Export to XML.
CHAPTER 3: FOLDER / DOCUMENT MANIPULATION MENUS

TOP LEVEL MENUS

Much of the basic functionality between the folder and document right click menus is the same. Availability of functionality is based on user privileges. If an item appears in gray, it is not available to the user in the current location. Main menu options include:

- **Main Menu**
  - **Delete** – delete the selected item. Deleted items display in blue by default if the user is in **Recovery Mode** (see [User Preferences](#)). This option will display as **Un-Delete** if the selected item is currently deleted.
  - **Archive** – mark selected item as archived. By default, archived items appear in red if the user is in **Archived Only, Active and Archived**, or **Recovery Mode** (see [User Preferences](#)). This option will display as **Un-Archive** if the selected item is archived.
  - **Remove from List** – remove the current item (and its contents) from the **Results** tab. It does not affect the item.
  - **Edit** - The **Edit** sub menu is identical on the folder and document level, and varies on the element level. In general, the submenus from here allow for the creation and modification of folders, documents and elements. See [Folder / Document Manipulation Menus – Edit](#) and [Folder / Document Manipulation Menus – Edit Element](#) for more details.
  - **View** – The **View** sub menu is identical on the folder and document level, and varies on the element level. In general, the submenus from here allow for a variety of viewing options for folders, documents, and elements. See [Folder / Document Manipulation Menus – View](#) for more details.
  - **Print** – provides options for printing images or barcodes. See [Folder / Document Manipulation Menus – Print and Export](#) for more details.
  - **Export** – provides options for getting elements out of **FileX** in any of a number of ways. See [Folder / Document Manipulation Menus – Print and Export](#) and [Export to XML](#) for more details.
EDIT SUB MENUS

- **Edit** – The **Edit** sub menu is identical on the folder and document level, and varies on the element level. Below are the menu items associated with folders and documents:
  - **Create New Item** – allows for new sub folders / subdocuments to be created within the currently selected folder. Items can only be added in accordance with the structure of the document tree. In other words, a document that belongs in one folder may not be created in another. **Create New Item** is not available on the document level.
  - **Duplicate Item** – launches Create New Item with the existing folder or document already selected.
  - **Link To New / Existing Item** – allows for the link of another folder to be attached.
  - **Modify Item** – allows for the modification of index values.
  - **Resequence Elements** – allows the user to drag and drop elements to display in a modified order.
  - **File Upload** – causes the File Explorer to open for access to the computer’s files. Double clicking on an item causes it to be uploaded into the current document.
  - **Update Status** – in addition to the statuses of **Delete** and **Archive**, if tracking is implemented, this option allows for the status to be changed to **Coming Due, Past Due or Exception**. More on this in the chapter on **Tracking**.
  - **Copy** – allows the user to copy a document or folder with its entire contents to another location.
  - **Cut** – allows the user to cut a document or folder with its entire contents to be pasted into another location. Note: Unlike some other applications, **FileX** does not remove (delete) the item from the source (original) location until it is pasted elsewhere. This prevents the **Cut** feature from accidentally deleting items.
  - **Paste** – allows the user to place a copied or cut item into a new location. In the event that a folder or document is being copied or cut and pasted to the identical folder or document type, the option to **Merge** will become available. The entire contents of the source object are added to the target, and the source is deleted.
EDIT ELEMENTS – RENAME AND RE-SEQUENCE

The Edit submenu on the element level includes these additional options:

- **Rename Element** – opens a small window with the current element name in it. The name can easily be changed or removed by typing in the window.

- **Re-Sequence Pages** – pops open a window with a list of pages and a mini viewer for the currently selected pages. By pressing and holding a page, it can be dragged and dropped to a new location within the sequence. Clicking **Submit** causes the changes to be saved. This feature is only available on scanned and TIF images.

- **Re-Classify Pages** – allows an element scanned directly into a folder to be placed in batch scan for reclassification. For more information see [Classifying the Batch](#).
EDIT ELEMENTS – CUT, COPY, PASTE, AND UPDATE STATUS

- **Copy / Cut Pages** – Copying and cutting elements is similar to the same features in documents. Additionally for scanned images is the ability to Copy / Cut Pages. From the resulting popup window, one or more pages can be selected from the element.
- **Paste** – Elements or pages that have been copied or cut can be added to existing documents to create new elements, or they can be inserted into existing elements.
VIEW SUB MENU

- **View (Folders and Documents)** – The View sub menu is identical on the folder and document level, and varies on the element level. Below are the menu items associated with folders and documents:
  - **Collapse All** – collapses all documents and folders up to the currently selected item.
  - **Expand All** – expands every folder and document contained within the currently selected item. This option allows for the easy browsing of the entire contents of a folder and all of its sub folders and documents.
  - **Load Parent** – loads the parent folder (immediately above the current item) of the currently selected item into the results tab. The parent folder will be displayed at the end of the list of currently displayed results.
  - **Load Root Folder** – loads the top level folder of the currently selected item.
  - **Reload** – reloads the folder or document to view any new modifications.

- **View (Elements)** – The View sub menu from an element displays a different list of options. Elements can be opened by clicking on them. If the element is other than a scanned or TIF image, it will open in an appropriate application (such as MSWord, Excel, Adobe, etc.). Otherwise it will open in the image viewer to the right of the results. How images are opened can be controlled by using the right mouse click and using the View sub-options:
  - **Display in New Tab** – opens image in a new Image Viewer tab keeping previous images open in their tabs.
  - **Display Full Screen** – open image in a new window defaulting to the full size of the screen. This window can be easily resized and moved. This window can be closed by clicking the “X” in the top right corner. Hit F11 for a shortcut to display full screen.
  - **Display Side By Side** – allows for the simultaneous viewing and manipulation of two images side by side in a single image tab. For one image, select “Display on Left” and for another, select “Display on Right”.

CHAPTER 4: PRINTING AND EXPORTING

PRINT SUB MENU

- **Print** – allows for the printing of documents, elements or barcodes. See [Barcode Batch Scan](#) for more information on barcodes.

- **Export** – provides options for getting images out of *FileX*. Options include:
  - **Email Link** – generates an Outlook email with a link to a folder or document to be sent to another user. When that user receives the email and clicks on the link, they are required to login to *FileX* as usual, and, if they have the necessary permissions, go directly to a **Results** tab with that item opened.
  - **Email Document / Element(s)** – converts element(s) to PDF format and attaches it to an Outlook email. By default, the sending user is prompted to include a user created password that the recipient is then required to enter in order to open the file. For security purposes, it is never a good idea to include the password in the email.
EXPORT TO XML

Export to XML allows control of exporting entire folders in bulk for use by auditors, examiners, or anyone else who needs access to files without requiring logging into the system. Any user with View privileges or above has the ability to Export to XML. Local IT or Digital Filing Solutions Support may need to be contacted to configure connection to the destination location.

Selecting Export to XML on any folder or document in the results tab causes the Export to XML window to open. A list is started for export. Exporting additional items either from the current Results tab or from subsequent searches adds to the list and can be done by clicking on the item and clicking the Add button in the Export to XML window, or using the Export to XML menu item.

Clicking on folders and document in the Export window causes them to be opened displaying the contents. Items can be selected and removed from the export list by clicking on the Remove button. Everything can be exported as a single unit or as one unit per top level item with the Export as Individual Items checkbox. It is a good idea to assign a name to the export for easy identification.

Resulting output is formatted in the same folder structure as in FileX. The yellow items in the example below are the images converted to PDF format for easy viewing.
CHAPTER 5: IMAGE VIEWER
INDEX INFORMATION AND WORKING LIST

Index Information – displays populated index values for the currently selected folder or document. A right click on an index value allows the user to copy that value. Click on the ^ symbol to collapse this information leaving more space for image viewing.

Working List – displays a list of folders, documents, or elements directly below the currently selected item. In this example, a list of documents below the “Common Documents” folder for David Johns is displayed in the working list.

- The Working List can be sorted by clicking on the heading of any of the displayed columns.
- Clicking a second time sorts items in reverse order.
- Click item in working list to be taken directly to the corresponding folder, document, or element in the Results tab.
- Click on the ^ symbol to collapse this list leaving more space for image viewing.

Right click on an index value to copy it to the clipboard:
IMAGE VIEWER FEATURES – DOCUMENT STATUS BAR

Immediately below the image viewer is the **Document Status Bar**. This bar displays information about the currently selected folder, document or element, much of which is self explanatory or not terribly relevant to the average user. Of great importance the the number following either the **D** or the **E**. This number represents the unique identifier within the **FileX** database, and makes getting help from **Support at Digital Filing Solutions** safe and secure. Should a user be having an issue with a particular item, an email such as, “I am receiving an error when I try to access document D-2963” or “How do I remove page two of “E1-3378” will indicate to the **Support** staff the exact item which is causing the question or issue without having to include personal informatio such as social security numbers in unsecured emails.
IMAGE VIEWER FEATURES – ZOOM, ROTATE, IMAGE OPTIONS

Note: The green icon with the check box will only be visible if the Tracking Module is configured. The green icon with the “T” will only be active if the Forms feature is being used.

- **Zoom In/Out** – use the magnifying glass with the plus or minus.
- **Rotate Image 90°** – rotate the current page or all pages ninety degrees to the left/right.
- **Image Options** – dropdown menu with options for further controlling image view. Options include:
  - Full Screen, Fit To Window, Fit To Height, Fit To Width – size the image as appropriate within the viewing area.
  - Retain Zoom – maintain the same zoom level while scrolling through multiple pages of an image.
  - Mirror Horizontal / Vertical – flip an image on the horizontal or vertical axis.
  - View Barcodes – display barcode values if they appear on the current image.
  - Border Removal – removes the appearance of the black border that can occur when scanner guide arms are not properly set.
  - Despeckle – removes the appearance of graininess or speckles from image.
  - Deskew – straightens an image that appears skewed due to guide arms not being properly set.
  - Invert – reverses black/white colors often making older or grayed images easier to read.
IMAGE VIEWER FEATURES – MOUSE BUTTONS AND PRINTING

Mouse Options – L and R are used to set mouse button functions within the Image Viewer. Drag Image allows the images to be dragged by holding down the mouse button. Zoom In / Out work like the magnifying glasses (see above). Zoom Box can be used to draw a box around a selected section of an image to zoom directly into that area. Annotation Control is used when working with Annotations (see below).

Print (printer icon) – opens a print window that is similar to most print windows. There are several options specific to image printing. They include:

- **Print Annotations** – as created with the Annotations icon (see below).
- **Deskew** – straighten images that were scanned slightly skewed or crooked.
- **Border Removal** – remove black border caused by skewed scanning.
  Note: Even if Deskew and Border Removal were selected on the image, images will default to printing with these options off.
- **Rotate Image** – rotates the image in small increments allowing for the straightening of images that are slightly tilted.
IMAGE VIEWER FEATURES – ANNOTATIONS

Annotations (yellow “sticky note” icon) – allows the addition of notes as “overlays” to an image. Images themselves are not changed.

- View Annotations – select whether or not to view currently created annotations.
- Set Font – change font, size, and color for selected annotation.
- Select – select an annotation for subsequent action (move, delete, font change, etc.).
- Highlight – create a yellow translucent box for highlighting a section of an image.
- Text – create text directly on image rather than in a “sticky note” type box.
- Note – create a sort of “sticky note” on image.
- Redaction – create a black or white box over a section of text.

Save (diskette icon) – save annotations and image adjustments.
CHAPTER 6: FOLDER / DOCUMENT CREATION AND MODIFICATION

CREATING TOP LEVEL FOLDERS

Top level folders must be created from the DocumentTree tab. Sub folders and documents must be created within the appropriate folder containing it. Thus, if the necessary top-level folder does not yet exist, the following steps will cause one to be created

1. Select the DocumentTree tab.
2. Click on the desired Top-Level Folder.
3. Choose either of the two ways to create it:
   A. Click on the Create New Item button from Home tab, OR
   B. Right mouse click on folder and select Create New Item.

4. From the Create New Item tab which will appear to the right, select the folder or document type to create from the Create Document Type dropdown list.
5. Populate index values.
6. Click on the Create button.

Note: Set Document Status As and Set Security Group As can be disabled by the administrator as global options and may not appear. If they do appear, it is best not to modify them unless there is a specific reason.
CREATING SUB FOLDERS AND DOCUMENTS – MORE ON INDEX FIELDS

Index fields may appear with a default value already populated. In this example, Ticket # will be populated with the current document number. If the gray value was inherited from the parent, it cannot be changed. If it was auto populated with a default initial value not inherited from above, it can be changed by saving the folder or document and then modifying it. That opens the field for editing.

If an index field name is displayed in red, it is considered a “required field”. The system will not allow the creation of the folder or document without populating that field.

Some fields may be specifically numeric. If that is the case and another character is entered, an error will be displayed.

Some index values are controlled by dropdown menus which may have a green arrow icon beside them. These allow the user to add values to the dropdown for this and future uses. Access to this feature can be controlled by the administrator and may not be available.

If a field has been designated using the specific field type of “email”, the value can be used to launch an email using that address and the default email tool for that computer. A field type of URL can be used to enter a web address which can be launched in the default browser by clicking on it.

Email Address: elizabethj@digitalfiling.com
Phone Number: (970)870-9105
Website: http://digitalfiling.com/
CREATING SUB FOLDERS AND DOCUMENTS

Sub folders and documents must be created within pre-existing folders. Search for the appropriate location. From the Results tab

1. Choose either of two ways to create it:
   A. Click on Create New Item from the Home tab, OR
   B. Right mouse click popup menu and select Edit and Create New Item.

2. From the Create New Item tab which will appear to the right, select the folder or document type to create from the Create Document Type dropdown list.

3. Populate available index values. (See note below.)

4. Click on the Create button.

Note: Any index fields inherited from the parent folder will be automatically populated in the sub folder or document being created. They will be grayed out even if they have no current value. Values that have been added at the lower level can be entered when the item is created.
CREATING MULTIPLE FOLDERS / DOCUMENTS AT ONCE

On the Preferences tab, there is an option titled Multi-Select Documents.

If this item is checked, multiple items can be created at one time via check boxes on the listed items in the Create Document Type dropdown. Some or all of the available items may be selected for creation. Clicking somewhere off of the dropdown will cause it to collapse exposing the index values for populating as necessary. Then click on Create to create the documents.

Note: If the index values for the selected items vary, it may be necessary to return to one or more of the created items to modify values. Required index fields are highlighted in red and will not create the item without the needed information. See Modifying Index Values for instructions on how to do this.
MODIFYING INDEX VALUES

Index values are the searchable values associated with folders and documents. These may be created automatically via an import from a core product, or may have been manually created by the user at the time of the item’s creation. It may become necessary from time to time to update index values. In order to do this:

1. Select the folder or document.
2. Choose either of two ways to modify values:
   A. Use the Modify Existing Item button on the Home tab, OR
   B. Use the right mouse click pop up menu, and select Edit and then Modify Item from the sub menu.
3. Index values can be modified the same way they were created above.

Note: If any index value appears on a folder, it should also be present on all sub folders and documents. Information is designed to flow down. If any value is changed on any folder level, FileX will push all matching index value types down to lower levels (whether those values were modified or not). This is why changing lower level values such that they no longer match associated values above is ill-advised. Any modification made above will replace values below.

Note: If documents do not preload (global setting used on slower networks), it may be necessary to open folders and subfolders for index values to modify lower level objects.
CHAPTER 7: ADDING FILES TO EXISTING DOCUMENTS

ADDING NON-SCANNED ELEMENTS

File Upload –
1. Select the document.
2. Choose either of two ways to upload files:
   A. Use the File Upload button on the Home tab, OR
   B. Use the right mouse click pop up menu, and select Edit and then File Upload from the sub menu.
3. Navigate file manager to the desired file.
4. Double click on the file.

Drag and Drop –
1. In addition to the File Upload feature, files can simply be dragged and dropped onto an existing document by selecting and holding down the left mouse button from:
   A. Desktop
   B. File Manager
   C. Email attachments
DIRECT SCAN

**New Scans** – Images can be scanned into documents from the Scan tab as follows:

1. Make sure that the scanner has been properly installed and is turned on.
2. Select the document from the Results tab.
3. Select the appropriate **Scan Function** from the dropdown menu. **Simplex** means single sided, and **Duplex** means double sided.
4. Click on the **Scan Document** button.

**Note**: A common mistake is to try to scan directly into the document tree. Make sure to search and select the appropriate (pre-created) document before attempting to scan.

**Add to Existing Scanned Item** – Images can be added to a previously scanned element from the Scan tab as follows:

1. Select previously scanned image.
2. Select Scan tab as described above.
3. Select **Add to Scanned Item** (located to the right of Scan Document as seen above).
4. Using the pop up window, select the destination of the new pages within the existing element.
5. Click on **Submit**.
CHAPTER 8: BATCH/BARCODE SCAN
CREATING A BATCH SCAN

Batch scanning allows a batch of pages to be scanned as a single packet such that the pages can be classified into proper folders and documents later. Batch scan must have been previously setup, and users must have necessary privileges to allow its use. Batch scan features can be found by clicking on Batch Scan within the Scan tab.

Batch Scan Task Bar – When batch scanning, a new window pops up. Create a batch as follows:
1. Click on Create New Batch.
2. Optionally click on the blank space under Name to assign a name to the batch, and press enter.
3. Optionally right mouse click under Owner to Take Ownership of the batch. This prevents anyone else from accessing the batch. You can also Assign Ownership of the batch.
4. Select the Scan Function from the dropdown menu.
5. Click on Scan to Batch.

To add pages to an existing batch (if for example the scanner cannot physically hold the entire packet),
1. Make sure that the batch to be added to is selected by clicking on it.
3. Re-select Scan Function if necessary. For example, the first pages may have been scanned as BW Simplex, but new pages could be Color Duplex. It is possible to mix scan function scans in a single batch.
4. Click on Scan to Batch.
BATCH SCAN QUEUE

**Select Batch to Classify** – Batches can be classified immediately by the creator, or they can be left in the queue to be classified later and even by a different user. After scanning to batch, if the user has exited the batch scan window, the Batch Scan button will have to be selected from the Scan tab to return to the Batch window.

There is a **Filter** which makes locating active or completed batches easier. Batches can be filtered by age or by the text in the Name, Created By or Owner fields.

![Filter Example](image)

Completed batches can also be located and selected. This is useful for locating scanned but misplaced images or rerunning the batch report.

![Completed Batches Example](image)
CLASSIFYING THE BATCH

Classifying the Batch – This is where the individual pages of the batch are assigned to document locations. This can be done immediately after scanning pages or anytime later. In order to classify a batch:

1. Select the appropriate folder from the drop down menu. In our example, the new pages are to be placed in a document in the Lending folder.
2. Select the appropriate document from the drop down menu. In this case, the new pages will be placed in a Boarding Data document.
3. Select from the three check boxes as follows:
   A. **Create New Document** forces a new document of this type to be created even if one of the same type already exists. If this is not checked, a new element will be added to an existing document if there is one, but a new document will be created if one doesn’t already exist.
   B. **Preserve Document Selection** keeps the same folder and document type selected after creating the current document. If not checked, user will be required to select folder and document type for each new document to be created.
   C. **Preserve Index Information** keeps the lookup fields populated after document creation. If not checked, fields are cleared and a lookup is required for each new document.
4. If the destination folder or document exists, populate one or more index fields and click on **Look Up**. Select the correct folder from the window. This will cause additional index fields to be populated. Index fields with a red title are required.

   It is also possible to manually populate the index fields. The red ones are required while rest are optional. If a suitable (based on the red fields) folder is located, the document will be placed there. If not, the folder(s) will be created.
CLASSIFYING THE BATCH – MORE ON THE LOOKUP

Note that if the user has preferences set to Active / Archived at the time of the Look Up, some of the items returned may appear in red representing archived folders or documents. When classifying into these items, elements will inherit a status of archived.

If Create New Document is not checked, FileX will attempt to located an existing document first. If found, it (or “they”) will appear in the Document List window for selection. If none is found, one or more appropriate folders will be returned instead.
CLASSIFYING THE BATCH – ADD PAGES AND CREATE DOCUMENT

Once the folder and document destination is selected and populated, the element can be created from the scanned images as follows:

1. Select the page or range of pages to be added to the document. Pages need not be selected from the batch sequentially. Pages that are not needed can be skipped. To navigate through the batch, use the left and right arrows beside the page number / number of pages.
2. Pages can be added one at a time or by page range (see below).
3. As pages are added, thumbnail images will be displayed in column to the left of the main image viewer.
4. Thumbnail pages can be re-sequenced by using the right click (see below).
5. Optionally, assign a name to the new element.
6. Click Create Document.
7. Repeat until all desired pages of the batch have been classified.

Use the upper text window to type in a page range, and then Add Range or select Classify All to classify all remaining pages to the current document.

Right click on a thumbnail image to move it in the sequence or remove it from the current document.
CLASSIFYING THE BATCH – IMAGE TOOLBAR

Should the user need to close out Batch Scan before completely classifying the batch, it is easy to return and identify previously classified pages by the green checkmark that will be displayed above the top left corner of the image viewer. If there is no mark, the page has yet to be classified.

If a page is to be intentionally left out of the classification process, it can be simply skipped, or it can be marked with a purple ‘X’ by clicking on that icon on the toolbar. The mark can be removed by clicking on the icon again.

Image icons can be used to make viewing easier. Abilities include zoom in / out, rotate left / right, read barcode if there is one on the page (see Barcode Batch Scan), set the left mouse button to Drag or Zoom Box, (see Mouse Options).
CLASSIFYING THE BATCH – COMPLETED BATCHES

If all pages are either classified or marked with the ‘X’, the batch will be moved to a status of COMPLETED. Should the user choose to be done with the classification with unclassified / marked pages, the entire batch can be flagged as complete by returning to the batch queue and clicking on Mark Batch Complete.

Right clicking a batch that is in the Completed queue, and selecting “Un-Archive” will return it to the active queue. If there are pages that had been unclassified, or if the global setting to allow classifying pages to multiple locations is activated, this can be done by selecting it from the active queue and going back through the Classify Batch process. In order for this to be available, the user must be a member of the Admin or Admin Batch Scan security group.
BATCH REPORT

**Batch Report** – Once a batch has been completely classified, an Excel report can be generated which will list all created documents. Click on **Show Completed** to see a list of completed batches. Select the batch for which the report is to be displayed, and click **Show Report**.

The batch report will look similar to this:

The report can be manipulated using standard Excel features. Upon exiting, the option to “Save” is presented. These reports can be regenerated at any time, so saving is not necessary unless changes have been made that the user would like to retain. (Note: If Excel is not installed, a window with application choices with which to open the report will be displayed.)
BARCODE BATCH SCAN

Barcode Batch scan, an optionally purchased module, combines the ability to scan groups of documents at one time with the added advantage of classifying those documents automatically. Barcodes can be generated by using the mouse right click on folders and documents and selecting Print.

There are two types of barcodes that can be printed directly from FileX: generic and specific. A generic barcode is used to create a new folder or document, and a specific barcode is tied to a folder or document that has already been created. Generally, if a new document is to be added to an existing folder, a specific barcode for the folder precedes a generic barcode in the stack before the images to be included in the element. If however, a new element is to be added to an existing document, a specific barcode for that document directly precedes the new pages.

Generic barcodes are printed directly from the document tree via the right click menu.

Specific barcodes are printed from the results tab, and are associated with a particular folder or document.
ASSEMBLING A BARCODE BATCH

A Barcode Batch is always assembled with a leading specific barcode sheet. What follows may be the pages of an element which will be created directly in that specific location, or one or more iterations of generic barcode followed by element pages representing documents to be created under the leading specific folder. At any time, a new specific barcode followed by more iterations of generic barcode and element pages can be appended. Following is an example of an assembled batch which will create within Benjamin Ortez’s Lending File folder an Affidavits document and a Closing Documents document each with a three page element:
CLASSIFYING A BARCODE BATCH

A **Barcode Batch** is created and scanned the same way as a basic batch scan. (See [Creating a Batch Scan](#)).

The difference is that rather than selecting **Classify Batch** and going through the process of identifying folder and document locations for the images, selecting **Barcode Batch** causes **FileX** to read and process the barcodes to automatically create the documents with the associated elements.

Note: The **Barcoding Options** do not apply to barcodes generated directly from **FileX**. These are used for barcodes generated by third party software and mapped to documents in **FileX**.
CHAPTER 9: TRACKING

INTRODUCTION

The optionally purchased FileX Tracking Module provides for easy and flexible alerts based on a variety of specifications. Folders and documents can be tracked based on pre-configured parameters. The Notes feature keeps papers and sticky notes off of the desk and in a secure digital format. The Report Writing tool allows for rapid information retrieval and compilation. With FileX Tracking, alerts and the associated document images are close at hand.

FileX folders and documents can be tracked in a variety of ways and based on an array of criteria. “Rules” can be preconfigured based on a date such as an expiration date, a field value or a null value, or the existence or absence of a document within a folder.

When the Tracking Module is installed and configured, a new tab will appear immediately to the right of the DocumentTree tab labeled ToDoList. From this tab, users can view lists of tracked items as well as reminders and saved searches.
ToDoList TAB

The **ToDoList** tab is the primary method of communicating tracking information with the user. From here users can easily find personal reminders, reports, saved searches, and tracking notifications. The **ToDoList** looks like this:

1. **Reminders** include reminders manually set by the user via the “Clock” icon on the tracking window. See **Reminders** for more information. This tab will also include reports generated by the **Report Writer** tool. See **Report Writer** for more information. The icon beside it can be used to display a full list of reminders including those which have been set to trigger alerts in the future.

2. Users can save search criteria to re-run at future dates. These will appear under the **Saved Searches** folder. For example, if a user created a search of all loans created within a particular date range for a certain city, and wanted to be able to re-run that search without entering all the parameters, the search can be saved and will appear here.

3. Each of the other folders is a custom created category of tracked items designed and built specifically for this customer’s FileX installation. Inside of these folders will be links taking the user directly to the tracked document when double clicked.

4. The number in parentheses following a folder name indicates the number of items contained in that folder.

5. Double-clicking on any item in the list will take the user directly to the associated document.

Note: Like on the results tab, a **Working List** will be available to the right of the **ToDoList** when a folder is highlighted allowing for the sorting of the items in that folder. Clicking on an item focuses on that item in the **ToDoList** folder. Double clicking returns the actual item in the **Results** tab. For more information, see **Index Information and Working List**.
DOCUMENT TRACKING

Items that are being tracked will be easily visible when retrieved either by double clicking them in the ToDoList or via a usual document search. The yellow symbol with the exclamation mark indicates that the item is being tracked and there is an alert associated with it. The text color of the folder or document indicates the type of alert being generated. In this example:

1. Purple text on “Certificate of Deposit” indicates an “Exception”.
2. “Insurance Docs” in green text signifies that the item is “Coming Due”.
3. “Insurance Docs” appearing in orange means that this document is “Past Due”.

Note: Colors may vary based on installation customization.
THE TRACKING WINDOW

When a document with a tracking alert symbol is highlighted, a matching alert symbol will appear to the right above the image viewer. Clicking on this icon will cause the Tracking Window to appear displaying additional details about the tracking parameters associated with the currently selected document. The Tracking Window will display in panels similar to the example here.

Window panels display / allow access to the following tracking functionality:

1. **Tracking type** – if the type is a Mandatory Documents rule, the list of Missing, Existing, and Waived documents will be displayed.

2. **Reminders** – these can be added to any document whether it is tracked or not and will be placed in the Reminders folder on the **ToDoList**.

3. **Category** – clicking on the category will show specific rules set for the tracked item.

4. **Notes** – users can view and report on notes created by other users, but only the owner can modify or delete their own notes.
TRACKING TYPE

There are two general types of tracking rules: Date Based and Exception. Date Based tracking (as shown here) is tracking based on any date associated with the folder or document. In this example, the selected item is “coming due” as stated in the orange text and confirmed by the date alerts below it. This date is some date in the index values of the item – perhaps an expiration date, a contract renewal date, or perhaps a due date for an invoice.

Tracking as Exception means that the document is tracked using rules that are not date based. In this case, the folder was setup as having four Mandatory Documents. The exception is indicating that one of the four is missing, one has been intentionally Waived with a customer note added, and the two other exist.
CREATING REMINDERS

The “Reminders” feature is used to set a manual reminder on an item. The reminder can be placed immediately on the user’s ToDoList, or it can have a date associated with it causing the reminder to be displayed at a later date. Reminders can be set for tracked documents by clicking on the yellow icon, or for non-tracked items by highlighting the folder or document and clicking the green check mark icon. The Reminders panel of the tracking window looks like this:

Reminders can be set for any folder or document by clicking on the green check icon which appears in the place of the yellow icon for non-tracked documents. They are set on an individual basis to bring a particular document to the user’s attention on or after a particular date.

Add reminder will cause the following popup menu will appear

1. **Show reminder on my to-do list** will cause the reminder to be displayed on the ToDoList under the Reminders folder.

2. **Add reminder to another user’s to-do list** will cause the reminder to be displayed on the ToDoList of the selected user’s under their Reminders folder.

3. **Set Reminder Date** will cause the reminder to be displayed on the ToDoList under their Reminders folder on and after the chosen date rather than appearing immediately.

Note on pop-up calendar if used: Clicking on the Month, Year title of the calendar causes all twelve months of the current year to be displayed. Clicking then on the Year title causes the previous twelve years to be displayed. From here, year, month, and finally specific date can be easily located and selected.

**Cancel Reminder** will remove the reminder from the current item.
REMINDERS ON ToDoList

Double clicking on an item from the Reminders folder on the ToDoList will cause it to be displayed in the results tab for further manipulation in FileX. Note here that in the sample ToDoList there are also several reports that have been generated by the Report Writer tool. For more information, see Chapter 10: Report Writer.

Reminders displayed on the ToDoList will not include items set for a future date. Clicking on the calendar icon beside the Reminders folders results in the display of a full list of all reminders including those set for future dates.
CANCEL REMINDERS / CLEAR ITEM INDICATORS ON ToDoList

Right clicking on the Reminders folder will open up 2 options: Clear new item indicators & Cancel reminders.

- Cancel Reminders allows you to cancel multiple reminders at once.

- When you have a new notification in your ToDoList, the tab will flash green. Both the folder and the document will have a green exclamation next to. Clear New Item Indicators will only remove the exclamation notifying you of the new item and will not change anything in your ToDoList.
CATEGORY

The text beside “Category” represents the category or title for this tracking item. This will also be the folder name under which this item can be found on the appropriate user(s) ToDoList.

**Owner** is the primary owner of the tracking rule and will also receive tracking notifications in their ToDoList. **Assigned** is an additional user who will also be notified. There may be one or more Assigned users.

NOTES

**Notes** can be added and saved to help with tracking and general document management.

Clicking on Add note will cause a box with a note window to pop-up. Text typed into that window will appear in the Notes panel with the name of the author as well as the date and time of creation.
SAVED SEARCHES

If a search is to be frequently used, it is helpful to be able to save the search parameters. This can be done by first performing the search either via the Basic Search window (shown here) or the Advanced Search panel.

After the search is executed, using the right click on the Document Search: line in the results tab directly above the results of the current search, and selecting “Save Search Parameters” causes the search parameters to be saved.

The new search will appear on the ToDoList under Saved Searches. Double clicking on the search name causes that search to be run.
CHAPTER 10: REPORT WRITER

INTRODUCTION

The Report Writer provides for easy creation and customization of reports from FileX. New reports can be quickly and easily defined, and existing reports can be re-run for up-to-the-minute information with a few clicks.

Users login to the Report Writer using their existing FileX credentials (or Windows Authentication). Access to folder and document index information used in the report adheres to existing security restrictions for the logged in user.

From the main screen of the Report Writer users can choose to create a new report or select an existing report with which to work.
DOCUMENT SELECTION

Choosing to **New Search Report** or **Missing Docs Report** begins the process of selecting and arranging report data. The first step is to select from available folders and documents. Access is based on individual user permissions. In this example, the user would like to generate a report from tracked documents that are coming due. By opening the folders the user chooses as many or as few documents for reporting as desired. For a **Missing Docs Report**, the only items that will be available will be folders with predefined Mandatory Documents Tracking rules, but the rest of the process is the same. For more information on Mandatory Documents, see [Tracking Types](#).

The “**Flatten search results**” is useful when a folder and subdocument are both selected. Values will be reported together in a single row.

After all desired folders and documents are selected, clicking the **Next** button moves the reporting process to the next step.
FIELD SELECTION

The next step is to select from available index fields. Parameters can be defined for selected fields by choosing from the Search Value drop down. In this example, report will display all documents with an “Expiration Date” between the current_date (a variable that can be used in place of an actual calendar date allowing the report to be rerun in the future without having to manually change the current date value) and the 30 days out.

The “Text field search type” values behave the way they do on the “Preferences” tab in FileX which is as follows:

- **EXPLICIT** requires the index field to match the search value exactly (without respect to case).
- **KEYWORD** allows for the search value to be located anywhere within the index field.
- **WILDCARD** allows for the use of the “*” (asterisk) to be used as a wildcard within the field. Note that when using WILDCARD, the absence of an asterisk as the first character forces the value to begin with the first text character entered.
FIELD SELECTION (cont.)

The Search value dropdown displays options for filtering **Search Values**. Options include:

- **=** – applies to text or numeric (formatted or not) fields.
- **<** – means that the value is “less than” (or “before” in the case of a date field) the entered value.
- **>** – means that the value is “greater than” (or “after” in the case of a date field) the entered value.
- **BETWEEN** allows for a comma separated range of values, the format of which is “123,456” for a numeric field, or “01/01/2015,12/12/2015” for a date field.

Field values can be “sequenced” for the report via the **Move Up / Move Down** buttons. Order defined on this screen will result in the columns to be reported in that sequence.

Note: current_date is a special variable used to represent the current date, regardless of when the report is run.

- In this example the report is for any items with a future due date from today’s date.

  ![Due Date Search Value: < current_date](image)

- In this example we are filtering for a particular range from today’s date to 30 days from today.

  ![Due Date Search Value: BETWEEN current_date, current_date+30](image)
CATEGORIZED CHARTS

Adding a chart to the report output is optional. If chosen, values from a selected index field will be displayed in chart format on a separate worksheet. This option will be skipped for now, but the topic will be returned to later in this material.
SEARCH MODE / REPORT TITLE

The Search Mode values behave the way they do on the “Preferences” tab in FileX. Active only, Archived only, or Active and archived documents and folders can be included in the report based on the selected value. Selecting Recovery mode would include all active, archived, and deleted documents and folders.

A Report Title can be entered.

Finally, the report can be scheduled to run automatically at regular intervals using the Auto-run report feature. Starting on a particular date, reports can automatically run in varying multiples of days, weeks, months, and years, and notifications of the reports can be sent to one or more additional FileX user.
RUNNING A REPORT

Defined reports are saved for future use. This example displays the screen for the report defined above. At this point, there are several options.

- **Run** causes the current report to be run in real time against current FileX data.
- **Edit** allows the current report definition to be modified. The user is cycled through the definition screens explained above.
- **Copy** creates a copy of the current report useful for quick and easy variations. In this example, this report can be recreated for each Officer, or for coming due rather than past due documents, with just a few clicks and keystrokes.
- **Share** sends a copy of the report definition to another user. That user’s ability to run the report still depends on their security access to the data being filtered. Having received a shared report, the new user can modify and run the report at will.
- **Delete** removed the current report definition.

Running a report offers the option to archive it. Having chosen to archive, old reports can be easily recalled either via download or directly from storage within FileX.
FINISHED REPORT

The Report Writer next provides several options for what to do with the generated report. Options include:

- **Save a copy of the report locally** in the user’s chosen (via Browse) location.
- **View the report** immediately when OK is clicked.
- **Archive a copy of the report on the server** stores a copy in the FileX system adding a Reminder on the ToDoList if the Tracking Module is installed.
- **Send report to other users** is different from the Share option described above in that this option only sends the finished report to selected user(s) rather than the report definition which can be modified and re-run. This option does allow the receiving user to have access to data which may not have been accessible before, so due care should be taken.

The report is then generated in Excel and will look similar to this:
COPY AND EDIT AN EXISTING REPORT

By copying the report that was created above, making a slight modification can display very different results and be saved as a new report.

In this example, the Expiration Date restriction of coming due within 30 days was removed to generate a report of all documents of the selected types for any expiration date.
CHARTS

This time a chart is selected in order to get a visual depiction of the number of documents assigned to each officer. This chart’s been given a title, “All Tracked Documents by Officer”. The **Category field** to be **Count** is Officer. Field values can also be displayed as **Sum** or **Average**.
REPORT WITH CHART

This report was generated with an associated chart. The chart is displayed on a separate Excel worksheet tab.

![Excel Chart Example](image-url)
STANDARD REPORTS

There are a number of Standard Reports built into the Report Writer which can be displayed by unchecking the box beside Hide standard reports. These reports appear with a unique icon to the left identifying them as system reports. Due to the sensitive nature of this data and the fact that it is not filtered by individual security restrictions on folder and document types, usually the admin is the only user with access to the Standard Reports.

Clicking on one of these will display the same Run screen as the other reports, but what follows allows the selection of date range and looks as follows:

Everything else about the running of these reports is the same as above.
CHAPTER 11: ADMIN CONSOLE

INTRODUCTION

The **Admin Console** provides for easy execution of administrative tasks. Users can be granted access to manage everything from within the console, or can be delegated individual portions such as User Management and Security.

There are five major panels within the **Admin Console** which include:

1. **User Management**
2. **Licensing**
3. **Global Options**
4. **Batch Scanning**
5. **Document Management**
USER MANAGEMENT - PROPERTIES

User access and security can be managed from the User Management tab of the Admin Console. From here, users can be created and modified via a side panel and five subtabs. The panel down the left side displays a list of currently active users. Properties associated with an existing user can be viewed and modified via the subtabs as explained below. The “New” button can be used to create a new user, and the “Copy” button can be used to copy the attributes of an existing user.

There are five subtabs within the User Management tab. The first is the Properties Tab.

1. **User Status**: User accounts can be marked as Active, In-Active, or Locked from this dropdown. Changing a user status to In-Active or Locked prevents them from logging in. They are also removed from the display list. By checking the “Show all users” box in the lower left corner, all users will be displayed, and In-Active and Locked users can be returned to Active status. Note: There is no functional difference between In-Active and Locked. The distinction is strictly for administrative convenience and can be used in whatever way makes the most sense.

2. **Last Access**: This box tells the administrator when this account was last used.

3. **Password**: The “Reset” button resets the user’s password to match the username. Note that the password is case sensitive. Users are required to choose a new password the first time they login after the password is reset.

4. **Use Windows Authentication**: Checking this box allows a user to be logged in without providing a password. Logging into Windows allows the user direct access to FileX. The user name must match their Windows login name.

5. The other fields are optional and are for information purposes only.

Changes made are not saved until the Apply button is clicked. The Revert button will remove all changes. Note that once the changes have been applied, they cannot be subsequently backed out using Revert.
USER MANAGEMENT – DOCUMENT ACCESS

Folder and document access can be assigned via the Document Access tab. Access is controlled via user groups. Each folder and document within FileX is assigned a user group. A user has no current access to items in gray. Items in black have some level of permission granted. By clicking on a folder or document the administrator can view and modify privileges. In this example, the administrator selected the Customer Information folder. This folder has been assigned the Customer user group. The selected user has Create access to this folder and all other folders and documents associated with this group.

Permissions function as follows:

- **No access** – the user cannot even see that this type of folder or document exists within the tree.
- **Read Only** – the user may view index information and elements without the ability to make any changes.
- **Update** – the user may modify index information but not add documents or scan new elements.
- **Create** – the user may create new items and scan new elements but not delete.
- **Create / Delete** – user has full access.

It is helpful to note that the permissions afforded other users to that same security group are displayed in the window in the lower right portion of the screen.

**Security Restrictions** may include such things as employee restrictions which keep employees from accessing the folders and documents of other employees. For more information, see User Management – Security Restrictions.

Changes do not take effect until clicking on the Apply button. Before applying, changes can be removed by clicking on Revert.
USER MANAGEMENT – GROUP ACCESS

Group access to folders and documents works the same in the Group Access tab as it does in the Document Access tab, but the view is different. Any group with the document icon next to it is associated with one or more folders / documents. Groups with the colorful icon are not currently associated with folders / documents. Some of these may simply not have been assigned, but others have to do with other types of restricted access. Examples include:

- **Admin** and the Admin sub groups grant administrative authority to users. The Admin subgroups allow for the granting of limited administrative authority. These should be granted extremely carefully. Contact Digital Filing Solutions if you would like more guidance on these.

- **Batch Scan** which appears like a document group is where users are given permission to use the Batch Scan facility. Batch Scan users should be given Create/Delete to this user group.

- **DFS Tracking** will only be available on systems where the Collateral Tracking module has been purchased and implemented. Users who will need access to tracking will need Create/Delete to these groups.

- **DFS Reports** is associated with standard reports that are generated on some FileX systems. These reports are typically found under the top level folder ---Administration in the document tree. It is sufficient for users to have Read Only access. This is also necessary if the Report Writer is used and Tracking is implemented.

- **Export to XML** allows users to use the Export to XML facility to export documents out of FileX.

Changes do not take effect until clicking on the Apply button. Before applying, changes can be removed by clicking on Revert.
USER MANAGEMENT – SECURITY RESTRICTIONS

In addition to the basic security options covered above, there may also be restrictions which will appear in the Security Restrictions window on the Document Access tab and the Group Access tab. These restrictions will vary based on specific configuration, and will apply to all folders and documents that share the particular security group. Displayed here are some of the standard restrictions including:

- **Disable All Annotations** – disallows the user from creating, modifying, or deleting annotations on any element attached to any document type associated with the selected security group.
- **Disable Create Annotations** – disallows the creation of annotations, but the user may modify or delete them.
- **Disable Highlight / Note / Redactions / Text** – disallows the creation, modification, or deletion of the associated annotation type.
- **Restrict Create / Modify / Update Status** – disallows the associated action on folders or documents even if a higher Security Level is granted. This allows for things such as giving a user Create/Delete so that they can use Cut / Paste without permitting the user to delete.

For specific information on using Restrictions, contact Support at Digital Filing Solutions.
USER MANAGEMENT - STANDARD OPTIONS

The options here are generally connected to functionality found on the Preferences tab in the client, but also include the Mouse and Annotations font settings in the image viewer. If a user chooses to change personal preference, changes will be reflected here. Changing a setting in the Admin Console will affect the user the next time they log in. Note that these changes are not locked or permanent, but can be reset by the user. The Reset button can be used to reset a user to default settings.
The Licensing panel allows the administrator to review and manage the use of Scan and View licenses. Total available licenses are listed beside each category title. Licenses in use are listed in the table below. In this example, LINDAJ has appropriated one scan license, and there are no additional users accessing the system.
GLOBAL OPTIONS – STANDARD SETTINGS

The section **Standard Settings** is separated into two categories. On the left are **System settings**, and on the right are **Password settings**.

**System settings:**
- **Push Release** affects updates for users. Options include **Disabled**, **Force** (at next login), and **Prompt**. **Prompt** provides a Yes/No option each time the user logs in until they accept the update.
- **Time Out Value** is the number of idle minutes before users are automatically logged out. 0 means no forced logout.
- **Force Protect PDF** determines whether passwords are required when emailing or saving elements as PDF files.
- **Limit Results** – limits the maximum number of results returned. If the icon appears in the results tab, additional results can be displayed.
- **XSLT File For Export** defines the file name for export files.
- **Modify Security Group** allows users to modify the security group assigned to a folder or document
- **Enable Multiple Selections In Dropdown Menus** allows for the selection of multiple values from the dropdown on an index field. Note: If multiple values are entered, the search function will not work on that item.
- **Pre-load Sub Documents** is sometimes turned off to improve performance. Documents are only loaded in the **Results** tab when the folder above is selected.
- **Order Documents By** affects the way items are returned in searches.
- **Order Elements By** affects the way items are returned in searches.

**Password settings:**
- **Enforced Password Rules** – none of the rest of the password settings are available unless this one is checked. The settings themselves are self-explanatory.
GLOBAL OPTIONS – DOCUMENT STATUS, CUSTOM SETTINGS

From this screen, the document color scheme can be modified. The top three are standard document status values. The bottom four in this example are related to tracking and will not appear if the tracking module has not been configured.

Custom Settings – Since these settings are global they should be handled with great care. Settings may vary based on installation. Please contact Digital Filing Solutions if you need assistance with Custom Settings.
BATCH SCANNING

Note that these setting should be handled with care. Please contact Digital Filing Solutions if you need assistance setting up batch scan.

Batch Scanning features can be setup and modified in this section. If batch scan has not yet been configured or changes are desired, it is strongly recommended that users contact Digital Filing Solutions for assistance.

Batch scan is setup at the folder level, and will apply to all documents within that folder. For batch scan to work properly, each folder created within the database must be uniquely identifiable by one or a combination of index fields. If there is ambiguity in the identification of a folder location, FileX will place the image in the first matching location it finds which may not be the intended destination. Therefore it is very important to choose the “unique fields” carefully. These fields will then become “required fields” when users try to batch scan to this location. This means that if in some cases one or more of these fields are null, the batch facility will force the user to create an entry, and then a new folder will be created.

Check box options in the upper left include:

- **Allow only one user to classify a batch** means that once a user begins to classify a batch, no other user can complete it.
- **Allow an image to be classified to multiple documents** allows one or more pages of a scan to be classified to multiple locations.
- **Display batch report when batch is completed** causes the Excel to be automatically launched and the batch report displayed at the completion of the classification of each batch.
DOCUMENT MANAGEMENT – DOCUMENT TREE

From the Document Tree tab the document tree can be managed on a limited basis.

- **Sort, Move Up, Move Down:** Documents and sub folders can be sorted alphabetically or re-sequenced. Unchecking the Sort box and selecting a document or sub folder will make the Move Up and Move Down buttons available.

- **Add Folder/Document:** After selecting a folder from the tree structure to the left, existing document types can be added to the folder. The Admin Console will only allow documents to be added if it will “fit” under that folder – in other words, the document selected must include at least the index fields associated with the parent folder. The Select document dropdown will display a list of qualified documents for the selected folder.

- **Add Link:** Similar to adding a folder or document, adding a link allows users to copy the selected document or folder from another location and paste a link into the selected folder. Users clicking on a “linked” folder or document will be taken directly to the source location.

Selecting Edit Document from any of those listed allows the user to modify the name of the document, find out how many locations within the tree the document can be found, and get a list of those tree locations. A list of index fields is also displayed.

Other options can be viewed but not modified from here. Contact Digital Filing Solutions if you need additional help with the document tree.
DOCUMENT MANAGEMENT – DOCUMENTS/FOLDERS

The Documents/Folders tab displays a list of all folders and documents that have been created on this system whether they have been used in the tree or not. Clicking “Edit Document” from the Document Tree tab displays the Document/Folders tab with the chosen folder or document selected. In the example below, the “Accounting Year/Month” folder is referenced once in the document tree, and the index fields associated with it are Year, Month, Vendor #, Vendor Name, and Security (the security group associated with the folder). From here, the name is the only thing that can be changed.

Note: it is highly recommended you contact DFS before changing any document name as this can affect tracking, reporting and other functions.

Changes do not take effect until clicking on the Apply button. Before applying, changes can be removed by clicking on Revert.
APPENDIX – HOT KEYS

A number of Hot Keys have been created to make navigating and manipulating folders and documents easier in FileX. These Hot Keys include the combination of the control key and a letter as follows:

<table>
<thead>
<tr>
<th>Hot Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ctrl + c]</td>
<td>Copy current folder or document</td>
</tr>
<tr>
<td>[ctrl + d]</td>
<td>Search for a particular document type in the Document tree or Results Tab and bring it into focus</td>
</tr>
<tr>
<td>[ctrl + e]</td>
<td>Edit the index fields for the current folder or document</td>
</tr>
<tr>
<td>[ctrl + f]</td>
<td>Find / begin a new basic search</td>
</tr>
<tr>
<td>[ctrl + h]</td>
<td>Hide documents with no images</td>
</tr>
<tr>
<td>[ctrl + i]</td>
<td>Display document information</td>
</tr>
<tr>
<td>[ctrl + n]</td>
<td>Create a new subfolder or document in the current folder location</td>
</tr>
<tr>
<td>[ctrl + r]</td>
<td>Refresh the screen by doing a <strong>Clear Results</strong> and <strong>Collapse Tree</strong></td>
</tr>
<tr>
<td>[ctrl + v]</td>
<td>Paste or merge depending on the selected folder or document. If the type is the same as that which was copied or cut, the result will be to merge the two items together leaving only one. Note: This function will not work when there are more than one possible Paste function based on the menu options. If there is the choice to either Create a New Item or Create a Shortcut, this hot key will be inactive.</td>
</tr>
<tr>
<td>[ctrl + x]</td>
<td>Cut folder or document</td>
</tr>
</tbody>
</table>
APPENDIX – QUICK ACCESS TOOLBAR

Right click on any icon in the Home / Search / Preferences / Scan tab and add it as a quick access icon on the toolbar. You can place it above or below the Ribbon.