



FileNexus Manual
Version 6.8



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What Is FileNexus?

FileNexus is an open, modular, easy-to-use, secure archival system for image, mainframe and PC generated data. It works over most networks and stores to any electronic or optical media device. FileNexus can retrieve any record instantly using a broad range of search routines and analytical tools. FileNexus users can view, add notes, research, print, fax, E-mail, or link to other applications directly from their own desktops.

SOME HIGHLIGHTS

- **Windows 64 BIT Technology** - FileNexus now takes advantage of 64 bit technology in 2 main components of the software, resulting in a faster, and more stable and secure Records Management system.
- **Windows Explorer Type Interface** - Familiar, intuitive, easy to use.
- **Thin Client/Thick Server Technology** - Keeps networked PC's clean and data-management functions fast and centralized.
- **Threaded Multi-Tier Enterprise Capability** - Although a single Windows 2008 server is all that is required for most solutions, FileNexus can be distributed over multiple servers in large enterprise applications.
- **Employs Microsoft SQL Server Database Engine** - Industry standard with greater power and flexibility than ever.
- **Access Information via LAN, WAN, Intranet/Internet** - More people than ever can now access mission-critical records.
- **Archive and Retrieve Multiple Native File Formats (Word, PDF, Excel, Lotus, CAD, etc.), Wave (sound) Files, AVI (multimedia) Files, etc.** - Store what you want, how you want, from any source. View it in your FileNexus screen or retrieve it ready to use in the original application.
- **Advanced Information Analysis** - Use integrated standard, wild-card and/or Boolean search capabilities across single or multiple record types to create custom searches, generate reports and employ results in other applications such as spreadsheets (e.g. Excel, etc.), databases (e.g. Oracle, Informix, Access, etc.) and/or word processors (e.g. Word, etc.) - Do complex text queries across mixed document types such as ASCII text, Word, Excel, E-Mail, etc.
- **Advanced Record Handling** - Highlight, redact, add notes, drag and drop records to next user/work folder, or have FileNexus archived records linked from other applications, e-mail, fax or print without ever leaving the desk!
- **Advanced Image Processing** - Capture a wider range of document types (colour, grey scale, black and white) faster. Includes advanced image manipulation including despeckle, deskew, border removal, etc. Index records using multiple bar codes on any page regardless of orientation.

Overview

FileNexus is a modular system. You can start with the Image module, the PC module, or the Text module. Whenever you are ready, you can easily add more functionality (networking, Internet access, extra scan stations, additional archival nodes etc.) by simply purchasing the necessary components.

Image Server (SIM)

The **Image Server** module is designed to help you archive paper documents. Typically these documents will be scanned into the system and indexed manually or automatically depending on whether you are using barcodes with a host lookup on the documents being scanned or not. Barcode and Duplexing are now bundled into the Image module.

Barcode (included in the Image module)

The Barcode module enables the scan station to read a barcode that has been printed or affixed to the first page of a document and auto-populate an index field for the document to be archived. This can be combined with a host lookup on your financial or other systems to populate other index values if a custom VB script is employed.

Duplexing (included in the Image module)

Duplexing allows a user to scan both sides of a page by only feeding it into a scanner once.

IPS (Image Capture)

The **IPS** module will monitor one or more network directories for Tiff images scanned at any number of Multi-function Photocopiers. Used in concert with the **Image** module, the Image Capture Service supports duplex scanning and barcode recognition. Documents processed through this module can be manually indexed by users or employ custom VB Scripting lookups in host systems based on barcodes read from the documents, before being archived to FileNexus.

PC Data Module

The **PC Data** module gives users the ability to archive any PC generated files (spreadsheets, word-processing files, graphic files, email messages, etc.) from their desktop.

PDF Server Module

The **PDF Server** will monitor one or more network directories for PDF documents to be identified and archived to FileNexus. Documents sent to this printer will then be converted to Tiff before being archived to FileNexus.

Text Server Module (SCM)

The **Text Server** will monitor one or more network directories for text based documents that are already stored in an electronic format (mainframe type reports) and automatically identify and archive them to FileNexus.

Web Client

The **Web Client** is the online client application that allows users to gain access to archived documents by logging into FileNexus via a web browser (i.e. Internet Explorer). This means there is nothing to install on a user PC as administrators can simply provide the URL for login. Users can move, redact, annotate, and manage their archived documents with the same functionality of the Windows Client, as well as conduct FileNexus Administrator tasks within the Web Client like User, Group, and Folder administration.

Email

The **Email** module allows an organization to automatically archive incoming and outgoing emails to and from all domain users or selected email accounts, freeing up storage space on Mail servers and maintaining the integrity of important communications between your organization and its customers, clients, and vendors.

Forms Overlay

The **Forms Overlay** option allows a user to view a Text or PDF document with just text data on it, and overlay artwork so it appears as if it was printed on pre-printed forms. For example, your users or customers may view Customer Billing Statements generated by a host system that are in plain text format. With Forms Overlay, you can overlay the company logos and artwork of the Statement so the user and/or customer views the Statement exactly as it would have appeared if printed and mailed.

Full Text

The **Full Text** Module is designed to archive a document by storing the standard indexes as well as all the words and numbers in the document into a database where the user can look up a document in the FileNexus Client by conducting a content search for words or numbers within the document.

Fax Capture

When a fax is received it is then placed into a folder on a workstation or server. From there the **FileNexus Fax Capture** application identifies and routes the file to the FileNexus server for indexing and archiving.

Setting up the FileNexus Server

What you need

- Microsoft Windows 2003 32 bit or 2008 R2 64 bit OS (with the latest Service Packs/Windows Updates)
- Microsoft SQL Server 2005 or 2008 with the latest Service Packs
- .NET 4.0 or higher
- IIS
- Internet Explorer 8.0 or higher
- FileNexus installation CD or .msi installation files

Step 1

Install Windows 2003 or 2008 R2 Server.

Step 2

Install IIS and .NET 4.0

Step 3

Install Microsoft SQL Server 2005 or 2008 with the latest Service Packs. When asked for the "sort order" choose **accent insensitive and case insensitive**. This means that when you are searching in FileNexus, a search for JOHN SMITH will be the same as a search for john smith.

Step 4

Install FileNexus on a dedicated server from the installation CD.

Step 5

Run the FileNexus Database Setup program from the Windows Start menu. This will link FileNexus to your SQL database.

Step 6

Install the FileNexus Client on a user PC and test the connection to the FileNexus Server.

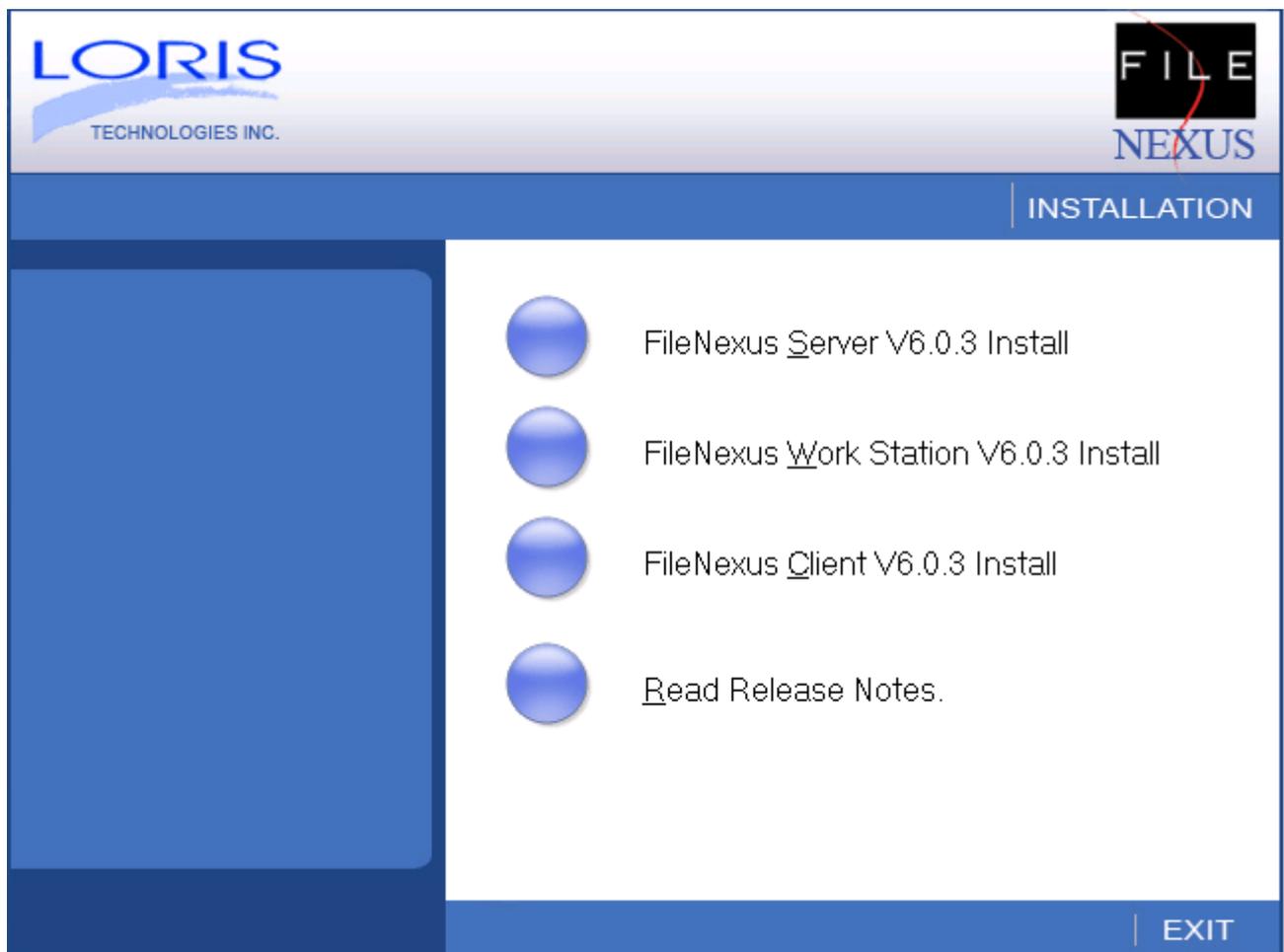
Getting Started on the Install

Insert the FileNexus Installation CD and run the setup program. Then, depending on what functions you want your PC to perform, select the component(s) you want to be installed.

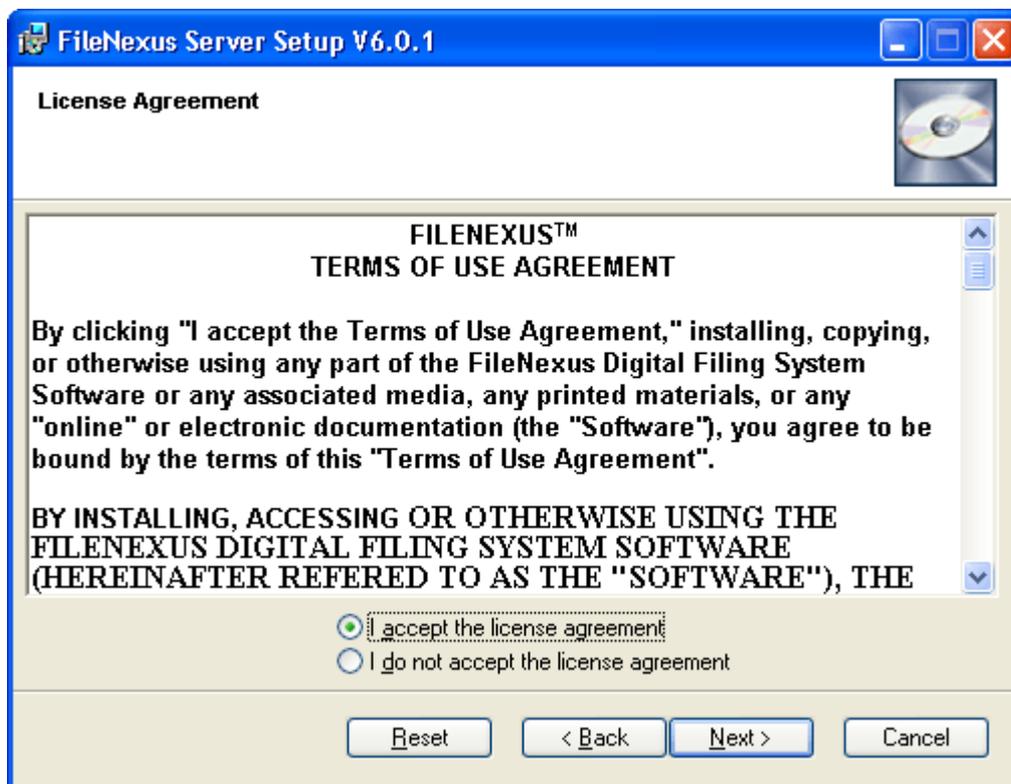
NOTE: You must have a valid FileNexus Serial Key in order to install FileNexus for the first time on a Server or PC. Contact Loris Technical Support at (416) 252-4701 ext. 230 for more information.

FileNexus Server Install

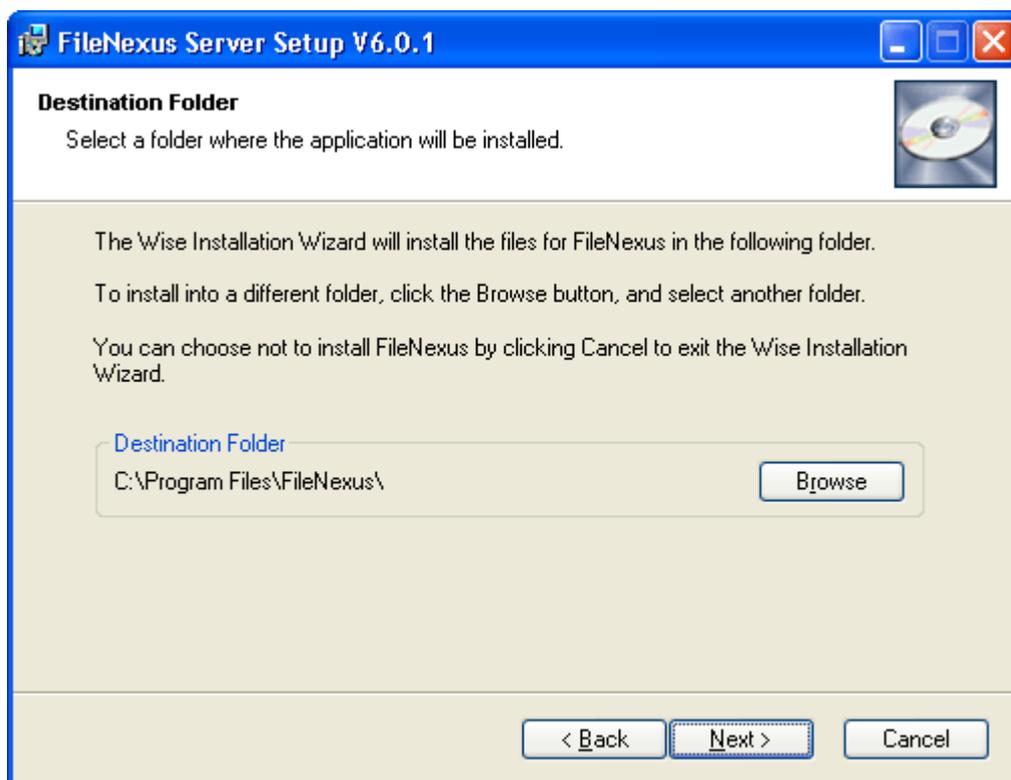
(Installs the Server components *plus* the Work Station and Client components)



After you have inserted the FileNexus CD and have selected the **FileNexus Server** install, you will need to agree to the FileNexus end user license agreement.

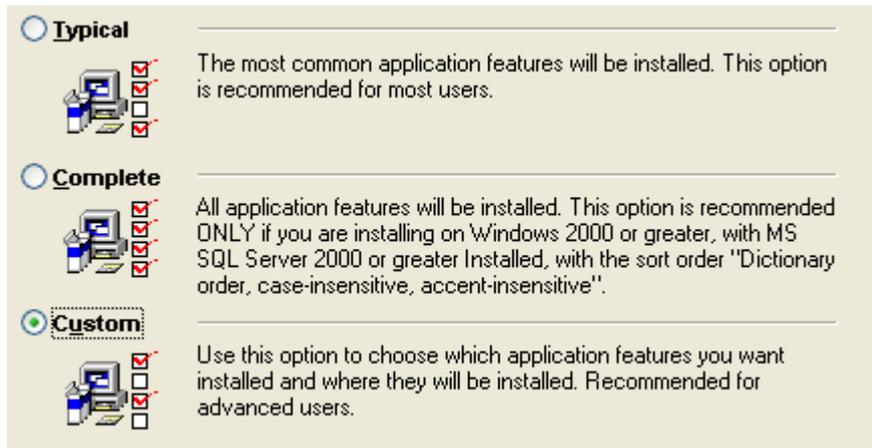


Once you have agreed to the license, you will be prompted to provide the destination folder in which the FileNexus Server components will be installed.



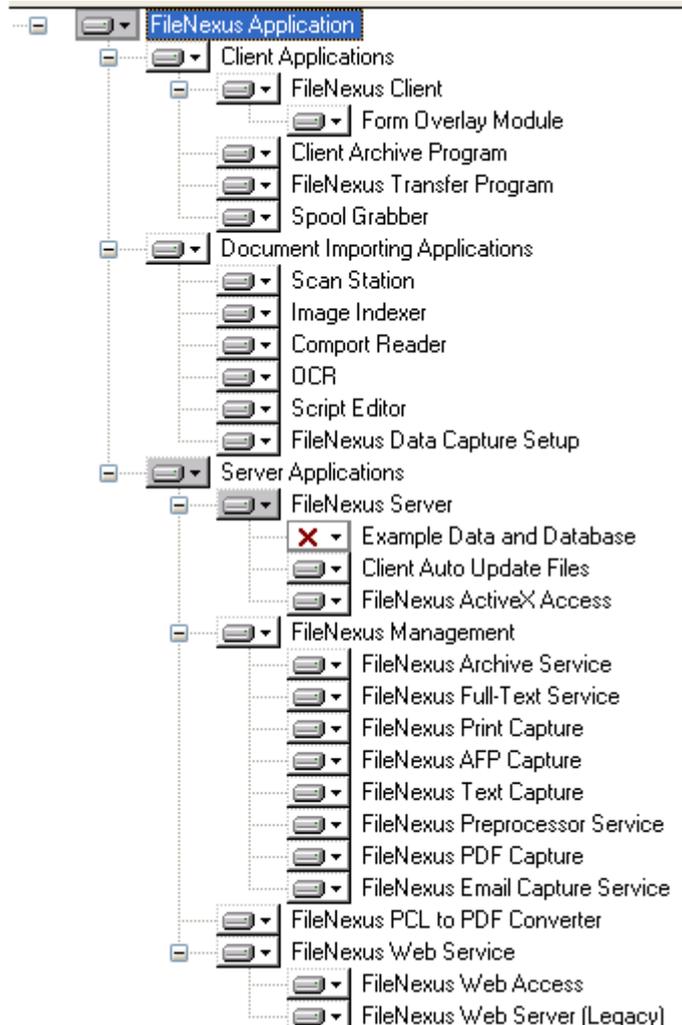
If you had a previous version of FileNexus installed on the computer, the FileNexus program will automatically default to where the previous version was installed (C:\Program Files\FileNexus for example).

For the Server installation, you should choose **Custom** instead of **Typical** install when given the option.



Then you can verify the components being installed are as you expect.

FileNexus Server, Workstation, and Client Components



After you have finished going through the installation wizard, you will be prompted to reboot the Server for the installation to complete.

FileNexus Workstation Installation

(Installs the Work Station components *plus* the Client components)



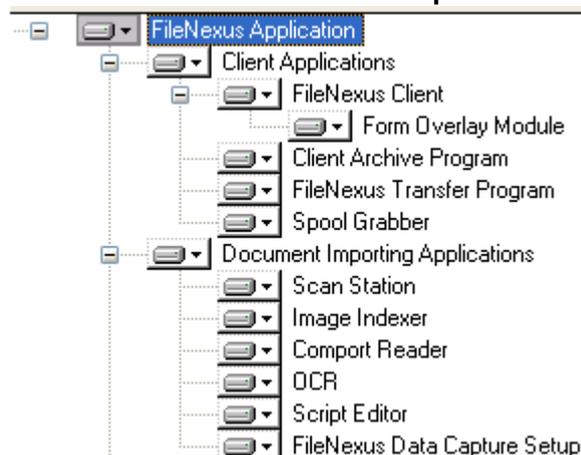
FileNexus Work Station V6.0.3 Install

After you have inserted the FileNexus CD and have selected the Work Station install, you will be prompted to uninstall the previous version of the client (if one is installed).

NOTE: The workstation components should be installed onto any PC that you want to act as either a Scan Station, Image Indexing station or as a Comport server.

Your next step is to agree to the FileNexus end user license. After you have agreed to the license, you will be prompted to provide a destination folder for FileNexus to be installed in. If you had a previous version of FileNexus installed on the computer, the FileNexus program will automatically default to where the previous version was installed.

Work Station and Client components



Client/Viewing Station Installation (Installs the Client components)

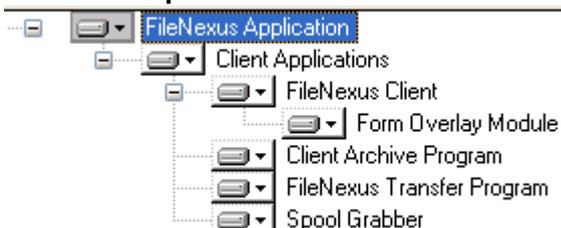
NOTE: the FileNexus Transfer Program is not installed by default)



FileNexus Client V6.0.3 Install

After inserting the FileNexus CD and selecting the **Client** install, you will be prompted to uninstall the previous version of the client (if one is installed). Your next step is to agree to the FileNexus end user license agreement. After you have agreed to the license, you will be prompted for the destination folder in which FileNexus will be installed. If you had a previous version of FileNexus installed on the computer, the install will automatically default to where the previous version was installed. Use the Client install for any PC that needs to search for archived documents.

Client components

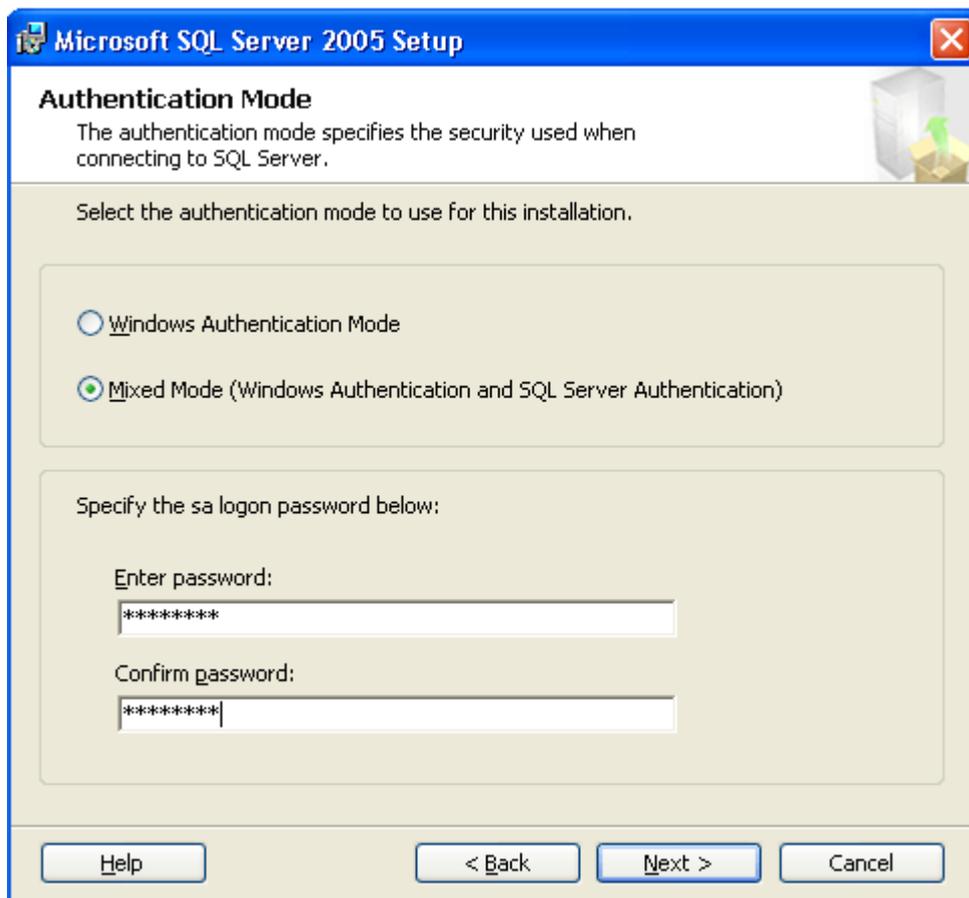


Installing SQL Server with FileNexus

After installing Windows 2003 or 2008 R2 Server, you will need to install SQL Server. To ensure your install and operation of FileNexus goes smoothly, you will need to change a few settings during the install of SQL Server. Both SQL Server 2005 and SQL Server 2008 may be used with FileNexus.



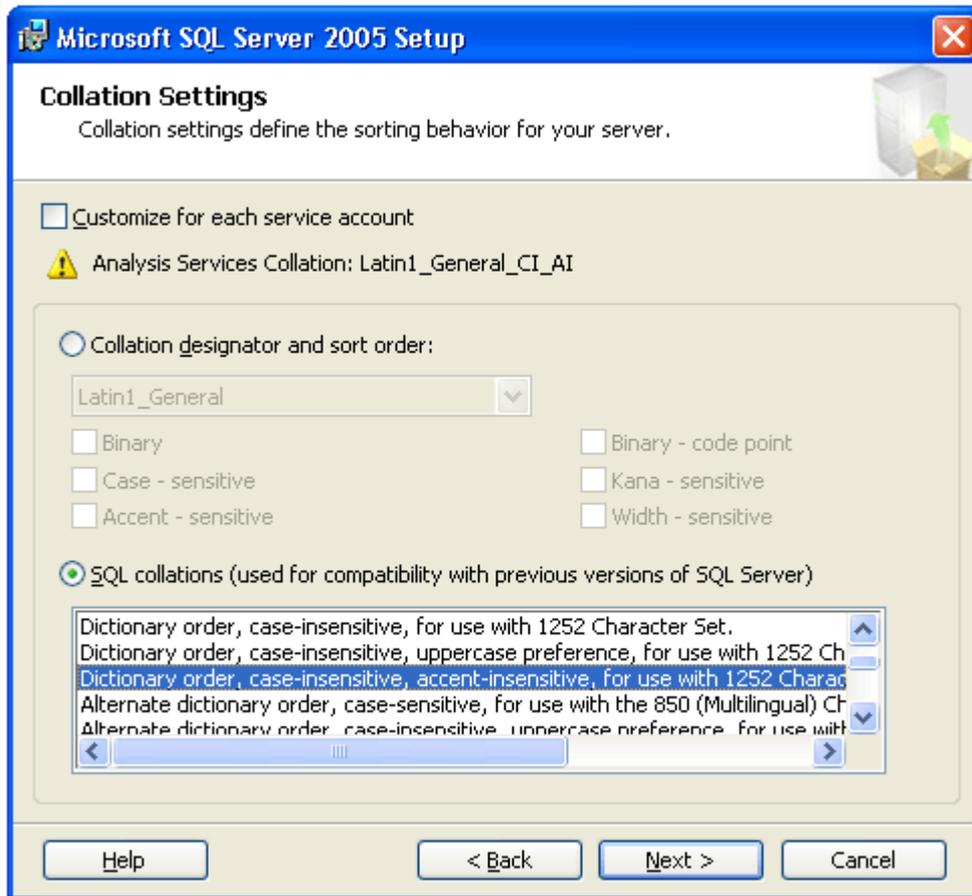
During the SQL Server installation, the default **Authentication Mode** to login to SQL Server will be set to **Windows Authentication Mode**. You will need to change the authentication mode to **Mixed Mode** for FileNexus.



In addition, it is a good idea to set and take note of the SA password during the installation. A SQL user login and password is required for FileNexus. If you prefer not to have FileNexus employ the SQL SA user and password, you may create a new user in SQL Server after installation that will have full administrative rights on the FileNexus Database (dbowner) that you will create.

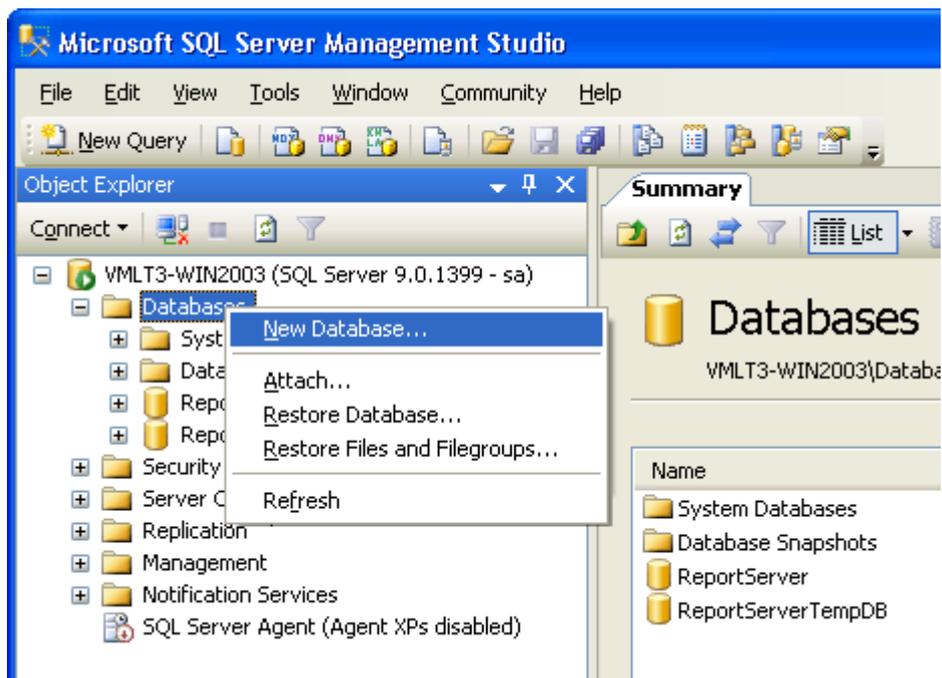
Though you may choose to leave the SA password blank during installation, it is recommended that you set the password and take note of it as soon as possible after installation is complete.

Under **Collation Settings**, you should select "Dictionary order, case-insensitive, accent-insensitive, for use with 1252 Character Set."



After you have installed SQL Server, you must also install the latest Service Packs for the application. When you have completed installing the latest service packs, you are ready to create your FileNexus Database.

To create a database in SQL Server 2005, launch the SQL Server Management program from your Windows Start menu. Navigate to the **Databases** folder, right-click on it and select **New Database**.



A window will open and you will need to name your database. In the below example, the database has been called "Nexus".

Database name: Nexus

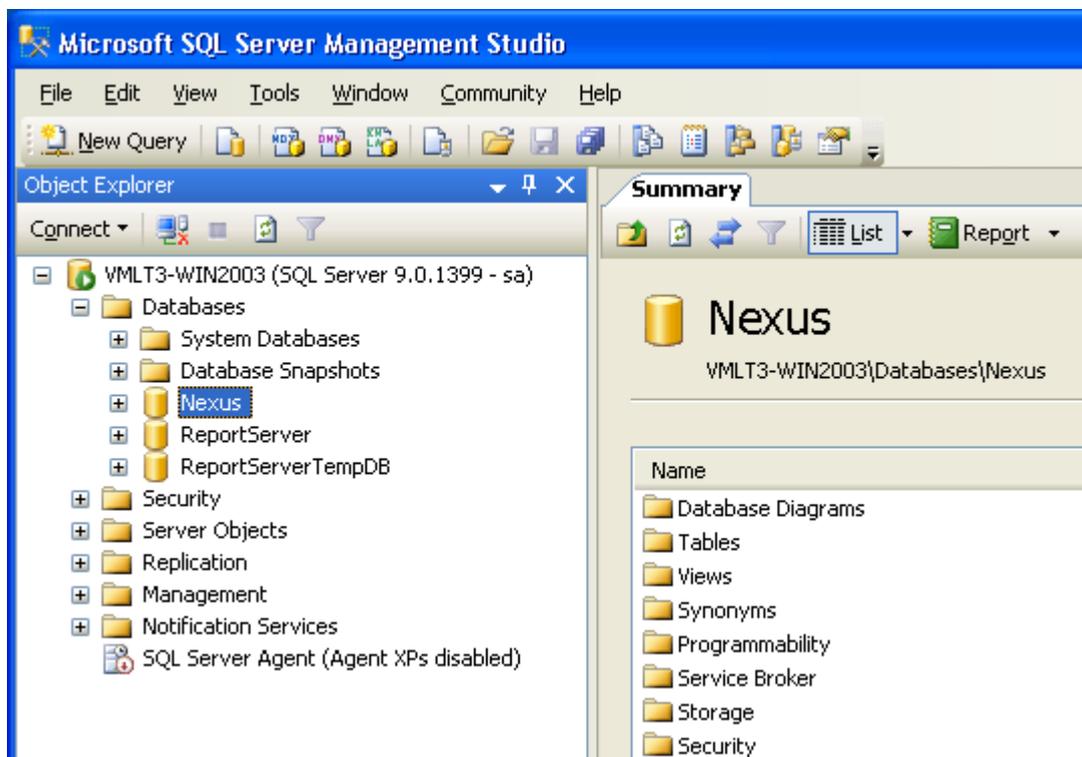
Owner: <default>

Use full-text indexing

Database files:

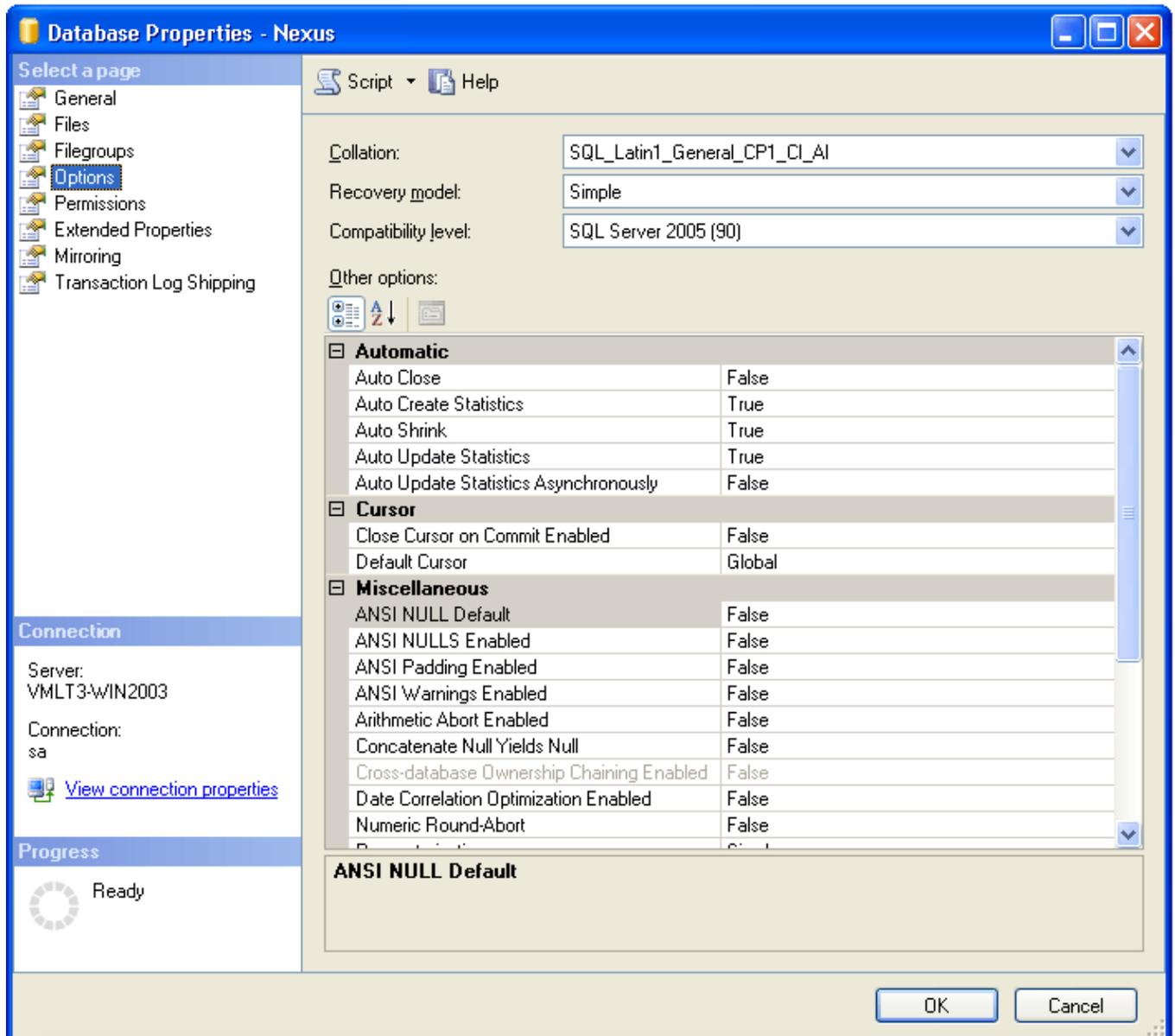
Logical Name	File Type	Filegroup	Initial Size (MB)	Autogrowth
Nexus	Data	PRIMARY	3	By 1 MB, unrestricted growth
Nexus_log	Log	Not Applicable	1	By 10 percent, unrestricted growth

Click on the **OK** button after you've entered the database name. Your database has now been created but you may want to make a few small changes to the database so that **Auto Shrink** is enabled and the Recovery model is set to **Simple**.



To do this, right-click on the **Nexus** database and select **Properties**.

Select **Options** in the **Database Properties - Nexus** window, change the **Recovery Model** to **Simple**, and make sure the **Auto Shrink** option is set to “True”.



Once you have made all the necessary changes, click on the **OK** button to save your changes.

Now you have completed the setup of SQL 2005 or 2000 and created the database needed for FileNexus, your next step is to run the **FileNexus Database Setup Program**. Running this utility will allow you to create the link between the FileNexus Applications and the SQL FileNexus Database. Please refer to the section [FileNexus Database Setup Program](#) for further information.

Backing Up Your Data

As a FileNexus administrator, you **must** maintain backup copies of both your data files and your indexes. A good approach is to back up your indexes (the FileNexus SQL database), the archival file(s) that you are currently archiving to and the **Annotate** folder located in the FileNexus Folder *every* night. Once you fill up an optical disk or start archiving to a new archival file on a hard disk drive, make a copy of the archival file(s) and keep it in a safe place (fire safe, off site building, etc.) You should also do a nightly backup of the FileNexus directory and all of its subdirectories.

Please see the section [Backing Up FileNexus](#) for more information.

Overview

FileNexus is an open, modular, easy to use, secure archival system for image and computer generated data. It works over any TCP/IP enabled network and stores data to virtually any electronic or optical media device. From within the FileNexus system, you can retrieve any record virtually instantly; then simply click a button to view, add notes, print, fax, copy, or e-mail directly from the desktop.

FileNexus is a suite of applications that are specifically designed to aid in the viewing and archiving of documents. The FileNexus system can be broken down to 3 sets of application suites which are used in different parts of an enterprise.

Client Applications	Workstation Applications (All Client Applications)	Server Applications (All Workstation Applications)
Batch Print PDF	Data Capture Setup Program	Database Setup
Client	Image Indexer	FileNexus Management
Client Archiver	Scan Station	FileNexus Server Properties
File Transfer Program	Spool Grabber	
Web Client		

The FileNexus Login

Most FileNexus applications display the FileNexus Login dialog when first starting up and require a user name and password before any further interaction with the application.



Logging into the FileNexus System

The FileNexus Login dialog is quick and easy to use - On the FileNexus Login dialog ensure the name (or IP Address) of your FileNexus Server is populated in the *Server Computer Name* text box, and enter your *User Name* and *Password*. Click the **OK** button to complete the login process.

Entering the FileNexus Server Name - Instead of typing in the name (or IP Address) of your FileNexus Server, you can click on the arrow of the *Server Computer Name* drop down box and view a list of up to 5 servers that were last used. If the list is empty, you can click the icon beside the drop down box to view a dialog box containing a list of remote computers.

For future logins - The Login dialog will display the last User Name and Server Computer Name used to connect to FileNexus and by default will clear the password edit box. If you check ON the *Save Password* checkbox, the last password used to connect will also be saved allowing you to login simply by clicking on the OK button.

Note regarding FileNexus Passwords - The *Computer Name*, *User Name* and *Password* edit fields are case insensitive, unless you are using Active Directory authentication through FileNexus.

FileNexus Batch Print PDF

This application enables the automated printing of PDF files. It is used in conjunction with the [FileNexus Spool Grabber](#) which must be installed and configured before this application can be executed. This application will allow users to "print" PDF documents to Tiff images in a Spool directory in order to be further processed before being archived to FileNexus.

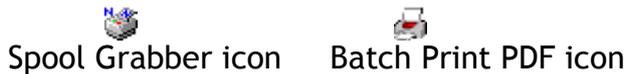
NOTE: Batch Print PDF requires Adobe Acrobat Reader 5.0 or higher for it to function correctly.

Refer to the next section on [Batch Print PDF Configuration](#) for settings and use.

Batch Print PDF Configuration

After you have installed and configured your FileNexus Spool Grabber, you can proceed to configure and use the FileNexus Batch Print PDF program.

To open up the Batch Print PDF program, click on the Windows **Start** menu, **All Programs, FileNexus, FileNexus Batch Print PDF** shortcut. This will place the following icons in your Windows System Tray.

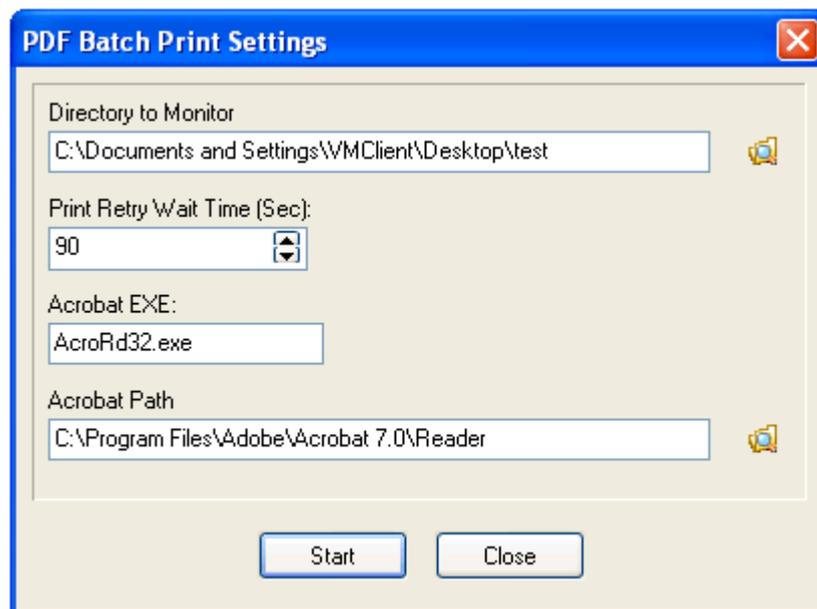


NOTE: If **both** icons do not appear in your Windows System Tray, you may need to reconfigure or check the settings for your **Spool Grabber Printer**.

To access the settings for the Batch Print PDF program, right click on the Batch Print PDF icon and select **Stop/Configure...**



The **PDF Batch Print Settings** dialog will appear, as shown below.



Directory to Monitor

The directory that must exist for the application to start and will be monitored for PDF files. All files placed into this directory must contain the ".PDF" extension in order for the application to be able to print the file to a **Tiff image** in the Spool Capture directory.

Print Retry Wait Time (Sec):

Represents the time to wait before trying to reprint the document if Acrobat fails to print the PDF file once it was called.

Acrobat EXE:

The name of the Acrobat .EXE file that will execute the printing. This file name is currently the correct file name and should not change.

Acrobat Path

The path to the Acrobat .EXE file to execute for printing.

Start

Clicking on this button will start the monitoring for new PDF files in the **Directory to Monitor** path.

Overview of the FileNexus Client Application

The **FileNexus Client** application is a graphical tool that provides the ability to:

- Search and display documents archived to FileNexus
- Customize search queries and create complex search patterns
- Organize documents in folders and sub folders
- Find all related documents in one search and group results by one or more indexes
- Add electronic notes and markups to documents
- Print, copy, or email archived documents
- Create small 1kb document links (short cuts) to archived documents for external work flow applications
- Create reports and comma delimited data files of search results
- Manage FileNexus users and groups to ensure the security of documents

Administration - For the FileNexus Administrator

Administration within the FileNexus Client encompasses User & Group administration, Folder Administration, Index Level security and managing Concurrent Users and Concurrent User Groups.

The following sections will help provide you with the necessary information required to perform the following FileNexus Administrative tasks:

1. [User Administration](#)
2. [Managing User Passwords](#)
3. [Group Administration](#)
4. [Concurrent Users and Concurrent User Groups](#)
5. [Folder Administration](#)
6. [Index Level Security](#)
7. [Event Scripts and FileNexus Workflow](#) (under Additional Administrative Topics)

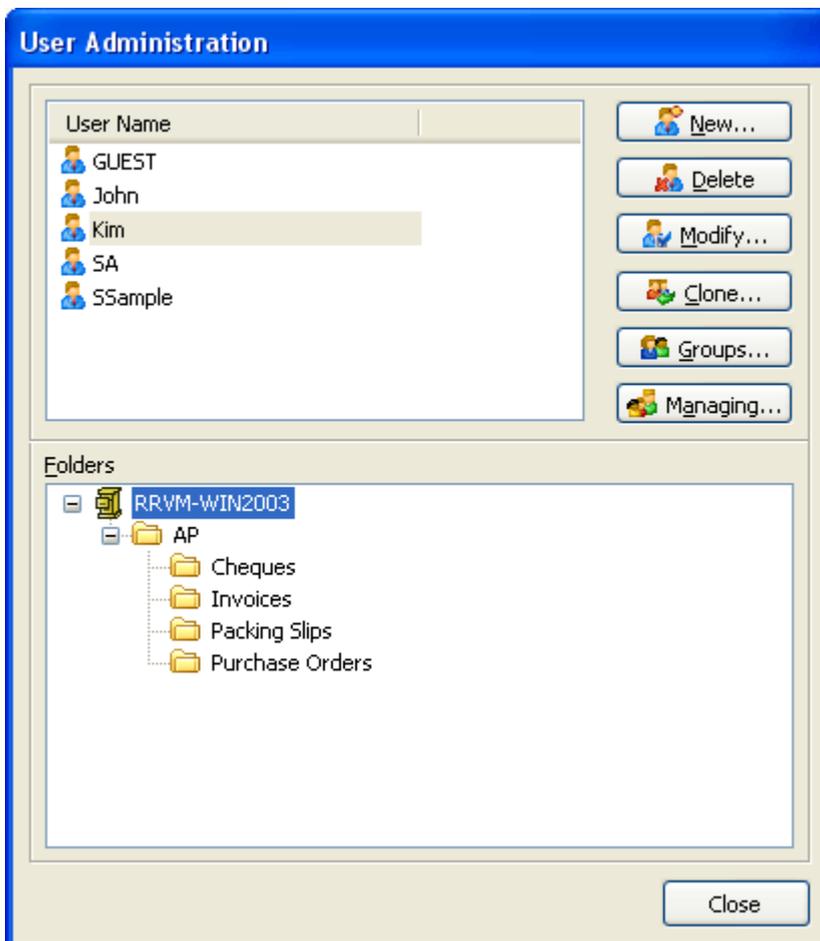
Note: All Client administration requires that you log into the FileNexus Client or Web Client.

Overview

User Administration allows a FileNexus Administrator to create, modify, and delete FileNexus users. As a FileNexus Administrator, you can also define what types of access rights a user has within the FileNexus suite of applications. The rights you grant a user will apply to all FileNexus applications the user employs. For example, if user jsmith only has access rights to view a single FileNexus folder called Packing Slips, then he will only be able to choose that folder as a destination when scanning packing slips using the FileNexus Scan Station application.

User Administration Dialog

The User Administration dialog can be used to add, delete, modify, or clone FileNexus users. In addition, you can add users to a Group and select which high level user can manage other users or group of users.

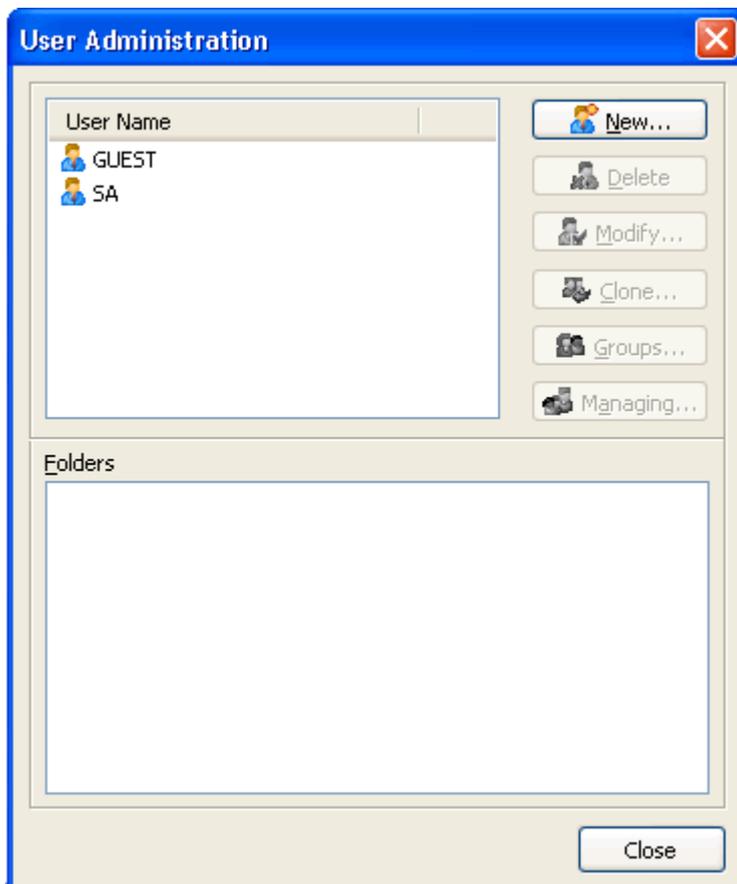


Adding a New User

To add a new user to FileNexus, select “*User Administration*” from the *Configuration* menu in the FileNexus Client.



The User Administration dialog will open - In the *User Administration* dialog, click on the **New** button. The *User Properties* dialog will open.



In the User Properties dialog you will need to enter a *User Name* and assign that user a default *Password*. In the User Access Rights section you will also need to assign basic rights for the user. To assign the user rights, simply select the appropriate checkboxes.



The screenshot shows a 'User Properties' dialog box. It has a title bar with the text 'User Properties' and a close button. The dialog is divided into two main sections. The top section contains three text input fields: 'User Name' with the value 'jsmith', 'Password' with 'xxxxxxxx', and 'Reenter Password' with 'xxxxxxxx'. To the right of these fields are two buttons: 'OK' and 'Cancel'. The bottom section is titled 'User Access Rights' and contains a list of checkboxes. The checked options are 'Password Changes', 'Document Importing', and 'Export Documents'. The unchecked options are 'Administration', 'Modify Groups', 'Modify Users', and 'Create Folders'.

User Access Rights - Overview

Administration

If this option is checked, the user will be given access to the FileNexus administration tasks in the various FileNexus applications: creating new document classes and capture settings files, changing scan settings, etc.

Modify groups

If this option is checked, the user will be allowed to add or delete users from groups, and change group security rights.

Modify Users

If this option is checked, the user will be allowed to create new users, delete existing users, change user passwords and change the rights that the users have.

Export Documents

If this option is checked, the user will be allowed to export documents from within FileNexus. Generally, most users are given this right.

Password Changes

If this option is checked, the user will be able to change his/her password. This does not give the user rights to change anyone else's password.

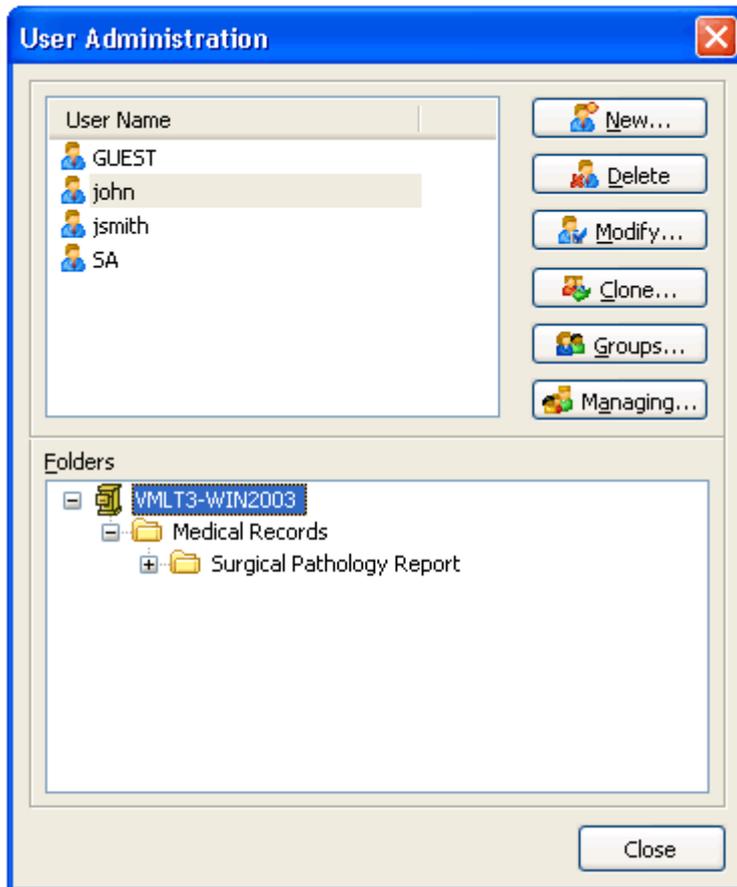
Document Importing

If this option is checked the user will be able to use the FileNexus Client Archiver, Scan Station and Image Indexer to scan documents, identify documents, or archive PC files. Scan operators will require this right.

Create Folders

If this option is checked, the user will be able to create a new folder in the FileNexus Client by right clicking in the FileNexus Folder-tree area and selecting *Create New Folder* from the pop-up menu.

When you have selected the appropriate access rights for the user and set both their user name and password, click the **OK** button to create the user. They will now appear in the list of Users on the *User Administration* dialog.



To find out the folders which a user has Access Rights to, simply highlight the user's name and the list of available folders will appear in the bottom Folders pane. By default, a new user will not have rights to any folders in the FileNexus Client until they are added to a folder or they become a member of a Group that has folder access rights.

To expand the folder tree, click on the name of your FileNexus server (VMLT3-Win2003 in the above example). A list of folders to which the user has access will appear. In the screen above, john has access to the Medical Records folder and its subfolders. The "+" sign next to Surgical Pathology indicates that it also has one or more sub folders. By clicking the "+" sign, you can further expand the folder tree to view the additional sub folders to which the highlighted user has viewing access.

NOTE: In order to manage which FileNexus users have permission to view, search and manage documents in specific FileNexus folders, please refer to the [Folder Administration](#) section.

Deleting a User

To delete a FileNexus user, highlight the user name and click on the **Delete** button in the *User Administration* dialog. Be sure that you want to delete the user before clicking on the Delete button, as you will not be prompted to confirm your selection.

Modifying a User

To modify a FileNexus user, highlight the user name and click on the **Modify** button in the *User Administration* dialog. The *User Properties* dialog will open and allow you to change the user's *User Access Rights*. Simply click the appropriate checkbox to toggle on or off the desired *User Access Right* for the displayed user. Click the **OK** button to save your changes. If you make a mistake in checking on/off an access right, click **Cancel** to exit the dialog. (For a description of User Access Rights in the User Properties dialog, refer to the previous section on Adding a New User)



The screenshot shows the 'User Properties' dialog box. It has a title bar with the text 'User Properties' and a close button (X). The dialog is divided into two main sections. The top section contains three text input fields: 'User Name' (containing 'jsmith'), 'Password' (containing 'xxxxxxx'), and 'Reenter Password' (containing 'xxxxxxx'). To the right of these fields are two buttons: 'OK' and 'Cancel'. The bottom section is titled 'User Access Rights' and contains a list of checkboxes with their corresponding labels: 'Administration' (unchecked), 'Modify Groups' (unchecked), 'Modify Users' (unchecked), 'Export Documents' (checked), 'Password Changes' (checked), 'Document Importing' (checked), and 'Create Folders' (unchecked).

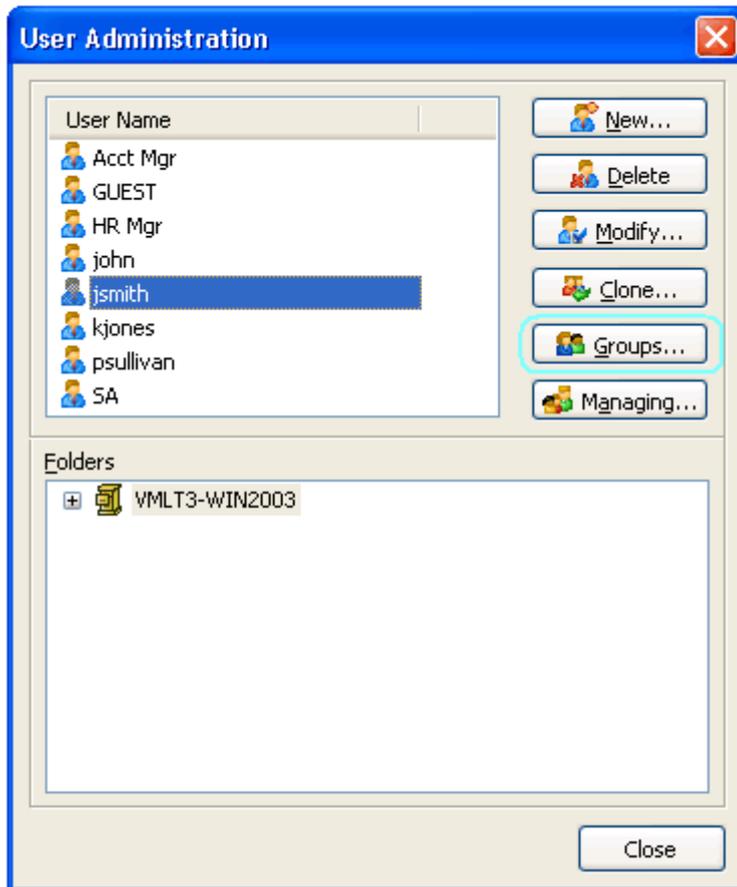
Cloning a User

If you need to create more than one user with the same *User Access Rights* and/or Group membership, click on the **Clone** button in the *User Administration* dialog. By cloning a user, you automatically create a new FileNexus user with the identical User Access Rights, Group Membership, and Folder Level Security, as the user being cloned. This is particularly helpful when initially setting up your FileNexus system, as you will generally need to create a large number of users and apply the appropriate user access rights, group membership and folder security to the user accounts.

User Groups

By selecting **Groups** in the *User Administration* dialog, a FileNexus administrator can make a user become the member of a Group. By adding a FileNexus user to a group, that user inherits all of the permissions and security rights in FileNexus to which the Group is entitled.

To make a particular user a member of a FileNexus Group, highlight a user in the *User Administration* dialog and select the **Groups** button.



The *Group Membership* window will appear.



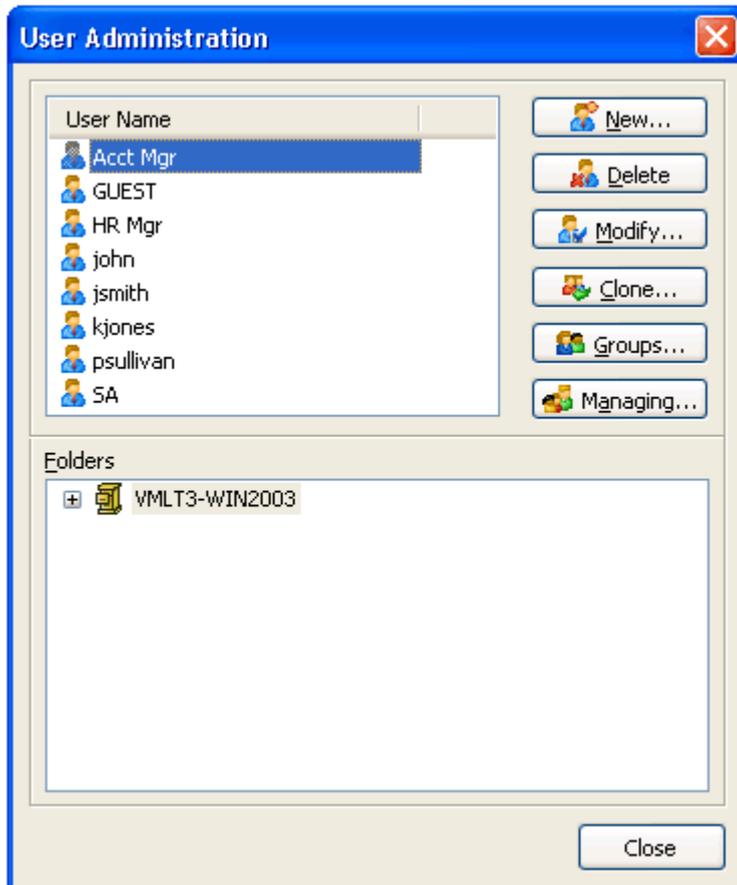
In the example above, a FileNexus administrator can select the FileNexus Group to which user *jsmith* should become a member. To select the group, highlight the group in the *Group List*, and then click on the left pointing arrow button. To remove the group membership for the selected user, highlight the group in the *User "jsmith" Groups* pane, and click on the right pointing button. When you are finished, hit the **Close** button.

For information on setting up FileNexus Groups and Group Administration, please refer to the section entitled [Group Administration](#).

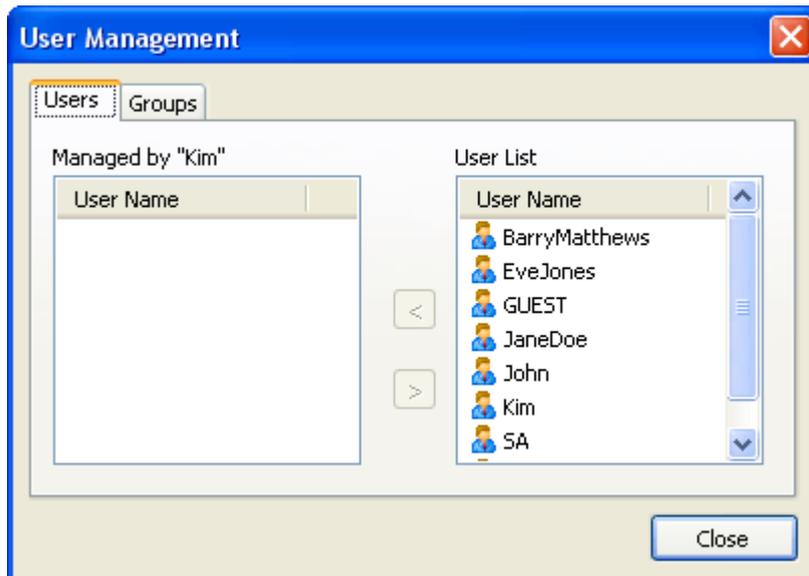
Managing Users/Groups

By selecting the **Manage** button in the *User Administration* dialog a FileNexus administrator can choose which "super" users may have managing rights over other FileNexus users and/or groups. For example, an Acct Mgr may be able to manage his/her team of employees in terms of which folders they have access to for searching/viewing/archival or which events they can perform on an archived document (document markups, moving a document, exporting a document, etc.).

In order to access the *User Management* window, highlight a FileNexus user in the *User Administration* dialog and click on the **Managing** button.



You will then have access to setting which Users and Groups a particular user can manage via the **User Management** dialog.

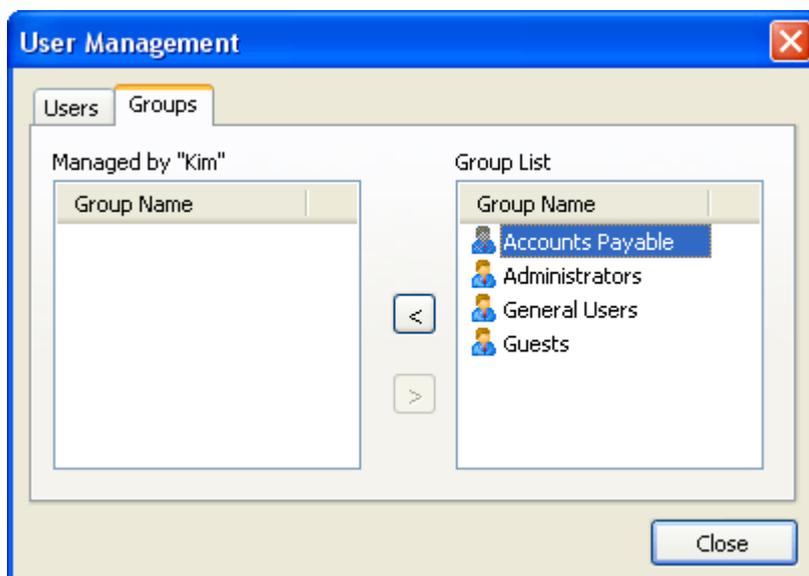


In the example above, a FileNexus administrator can select which FileNexus users will be managed by **Kim**. To add people to the list of users that Kim manages, highlight the user in the *User List*, and then click on the left pointing arrow button.

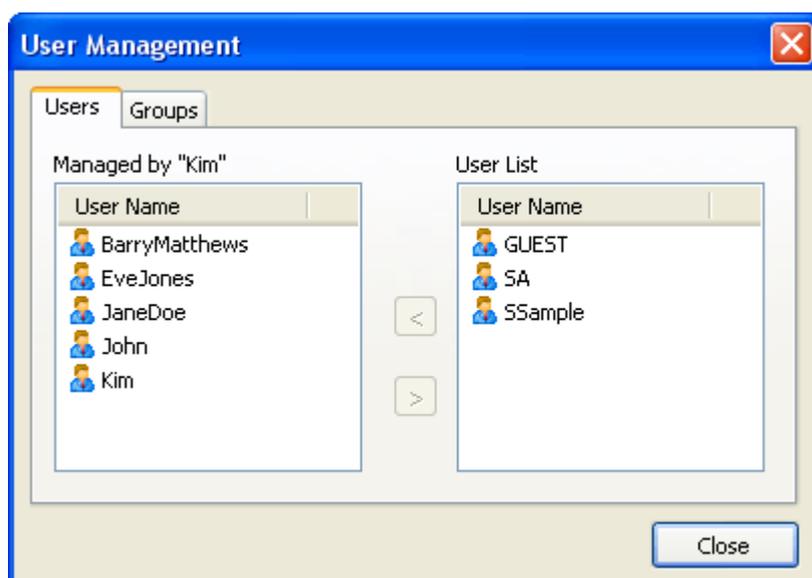
To remove people from the list of users Kim manages, highlight the user in the *Managed by "Kim"* pane, and click on the right pointing arrow button. When you are finished, hit **Close**.

Alternatively, you can set Kim to manage one or more *Groups* of users. This may be a more effective manner of allowing someone to manage the FileNexus permissions of several users.

On the *Groups* tab of the *User Management* dialog, highlight the group that Kim should manage and click on the left-pointing arrow and **then click the Close button** to save your changes. In this case, we will set Kim as the manager of the *Accounts Payable* group of users.



If you then go back to the *Users* tab of the *User Management* dialog, you'll be able to verify that all of the users in the *Accounts Payable* group are now managed by **Kim**.



NOTES:

- A user does not have to be a member of a Group in order to manage it.
- More than one user can manage the same Group of users
- In order to manage a user (or group of users) as seen in the example above, the user Kim would need to have the "Modify Users" right. With this right, she will be able to create new users to add to the group and adjust the rights of users in the group. (refer to the section on User Administration for more information on *User Access Rights*)

Changing Your Password

Once a user is logged into the FileNexus Client, he or she may then elect to change his/her password. To change your password, go to the *Configuration* menu in the FileNexus Client application and select “*Password*”.



In the Password Dialog enter your new password in the *Password* field and then confirm your password by re-typing it into the *Reenter Password* field. When you are finished click **OK** and your password will be instantly updated.



NOTE: A user may only change their password if they have security rights to do so, as set up by the FileNexus Administrator or a user set up as the *Manager* of that user or a group in which the user is a member.

Overview

Group Administration allows the FileNexus Administrator to create, modify, and delete FileNexus groups. As a FileNexus Administrator, you can also define what types of rights a group has within the FileNexus applications. The rights you grant a group will apply to all FileNexus applications the users of the group employ. For example, if user jsmith belongs to a group called Sales, and that group only has rights to view a single FileNexus folder called Quotes, then he will only be able to choose that folder as a destination when scanning Quotes using the FileNexus Scan Station application.

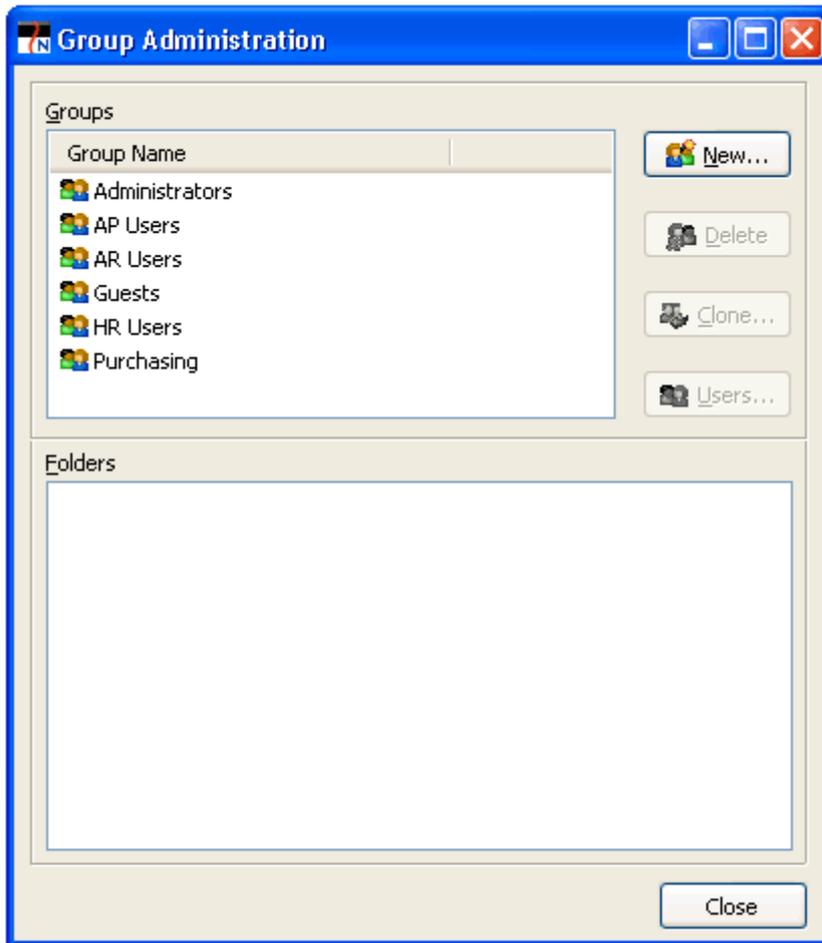
Group Administration Dialog

The Group Administration dialog can be used to add, delete, or clone FileNexus groups. In addition, you can add and remove FileNexus users to a Group. By default, the Administrators group is provided upon installation. Any user that is a member of the Administrators group is a full Administrator of the FileNexus System, with the same rights as the SA user.

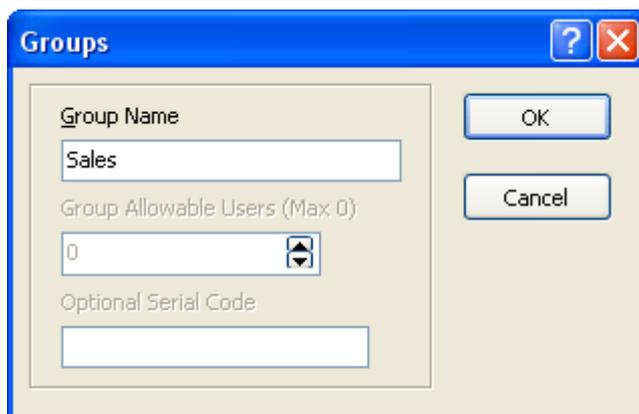


Creating a New Group

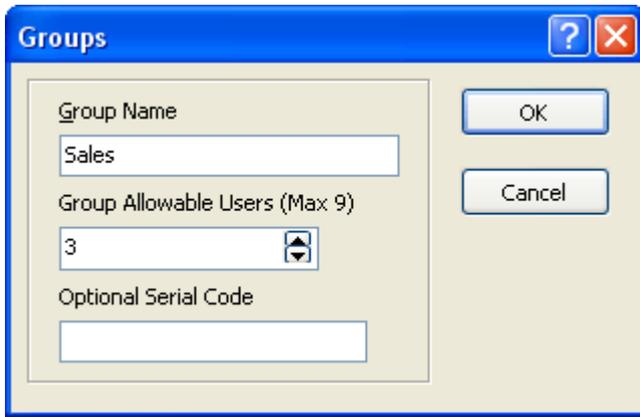
To create a new group, choose *Group Administration* from the *Configuration* menu. The Group Administration dialog will open. Click on the **New** button.



In the Groups dialog type in the name of the new group, and click the **OK** button.



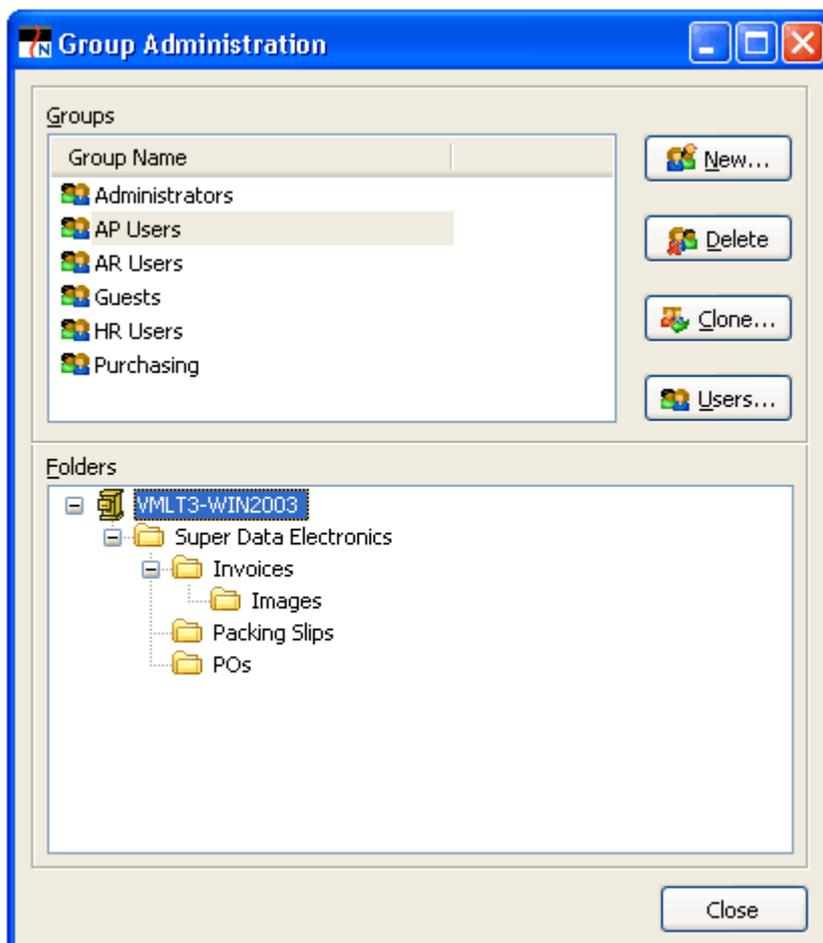
If your organization is taking advantage of *Concurrent User Groups* to help manage the number of user licenses allotted per department, customer, etc., you can set the number of *Group Allowable Users* before hitting **OK** as shown in the following image. If not, this option will be disabled.



For more information on Concurrent User Groups, please see the Administrative Topic on [Concurrent Users and Concurrent User Groups](#).

By default, a newly created group will not have access to any folders in FileNexus unless you have cloned an existing group.

To verify which folder(s) a group has security access to, highlight the group name in the Group Administration dialog and then click on the name of your server **in the Folders pane at the bottom**.



A list of folders will appear as in the example above. These are the folders that the highlighted group has Access Rights to view, search etc.

Deleting a Group

To Delete a FileNexus group, highlight the group in the Group Administration dialog, and then click on **Delete**.

Cloning a Group

If you wish to create a FileNexus group that is very similar to one that already exists, you can highlight the desired group and click on the **Clone** button. Then, enter the name of the new FileNexus group.

Users

If you wish to add/remove users from a FileNexus group, click on the Users button.

Adding Users to a Group

Group Membership

Sometimes in a larger organization it's easier to manage users by dividing them up into various groups. Then, instead of assigning security rights to individual users you simply assign security rights to an entire group. This way, when a new Accounts Payable clerk joins the company you can simply add the user to the *AP Users* group - the user now has access to all of the folders that are available to members of the *AP Users* group.

A user can be a member of more than one group, and may also have specific folder access rights granted to them as an individual.

NOTE: If a user's individual security rights are different from the rights they have as a member of a group, the individual rights will override the group security rights.

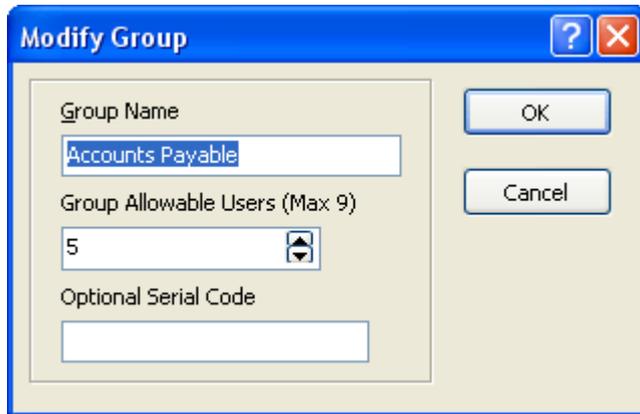


To add a user to a group, first highlight the group, and then click on the **Users** button. A window similar to that shown above will appear. Highlight the user name and then click on the left arrow button to move the user to the **Group “AP Users” Users** pane. If you wish to remove a user from a group, highlight the user in the **Group “AP Users” Users** pane and click on the right arrow. When you are finished, click on the **Close** button.

When you have finished setting up your Users and Groups, you can proceed to **Folder Administration** to grant FileNexus document access rights at the User or Group level.

Modifying a Group

To modify the number of *Concurrent User Licenses* allotted to the group, highlight the desired group and click on the **Modify** button. Then in the Modify Group dialog, adjust the *Group Allowable Users (Max N)* as required and click the **OK** button to save your changes or the **Cancel** button to ignore your changes.



NOTE: The **Modify** option on the **Group Administration** dialog will only be available if your FileNexus System is set up to take advantage of *Concurrent User Groups*.

Concurrent User Licenses by Organization vs. Concurrent User Licenses by Groups

If a FileNexus User or Administrator logs into any FileNexus Application, whether it's on a Scan Station PC, User PC, or Server, a single *Concurrent License* is used from the total pool of Concurrent Licenses the organization has purchased or is renting. If the same User logs into another FileNexus Application from a second PC or Server, a second *Concurrent License* is used from the total pool of Concurrent licenses.

Note: If a FileNexus User or Administrator logs into several FileNexus Applications on a single PC using the same FileNexus User Name and Password for each application, then only a single *Concurrent License* is used from the total pool of Concurrent Licenses the organization has purchased or is renting.

By default, Concurrent Licenses are used from a single pool of licenses available to the entire organization, even though the FileNexus Users may be a member of one or more FileNexus Groups.

In FileNexus Version 6 and higher, a FileNexus Administrator has the ability to divide an organization's total pool of Concurrent User Licenses by Groups. So, if a FileNexus Group is set up for each department, client or customer site, an Administrator can allocate Concurrent User Licenses to the FileNexus Groups as needed.

A simple example of dividing the pool of Concurrent User Licenses by Groups may be as follows:

Background: Trevco Power Inc. is licensed for 35 Concurrent User Licenses

Concurrent User Licenses by Groups:

AP - Max 5 allowable concurrent licenses

AR - Max 5 allowable concurrent licenses

HR Users - Max 5 allowable concurrent licenses

Sales - Max 5 allowable concurrent licenses

Customer Service - Max 12 allowable concurrent licenses

Administrators - Max 3 allowable concurrent licenses

In the above example, once the *Customer Service* Group has used 12 concurrent licenses, they cannot have additional Customer Service Agents log into FileNexus Applications by using a license from another group. They are only guaranteed a maximum of 12 concurrent licenses or connections to the FileNexus System at any one time.

If Trevco Power did NOT employ Concurrent User Licenses, all 35 licenses would be available to any FileNexus User, so it is possible that the Customer Service Agents could use all of the organization's licenses and thereby prevent any other users (including Administrators) from logging into the FileNexus System until someone logged off.

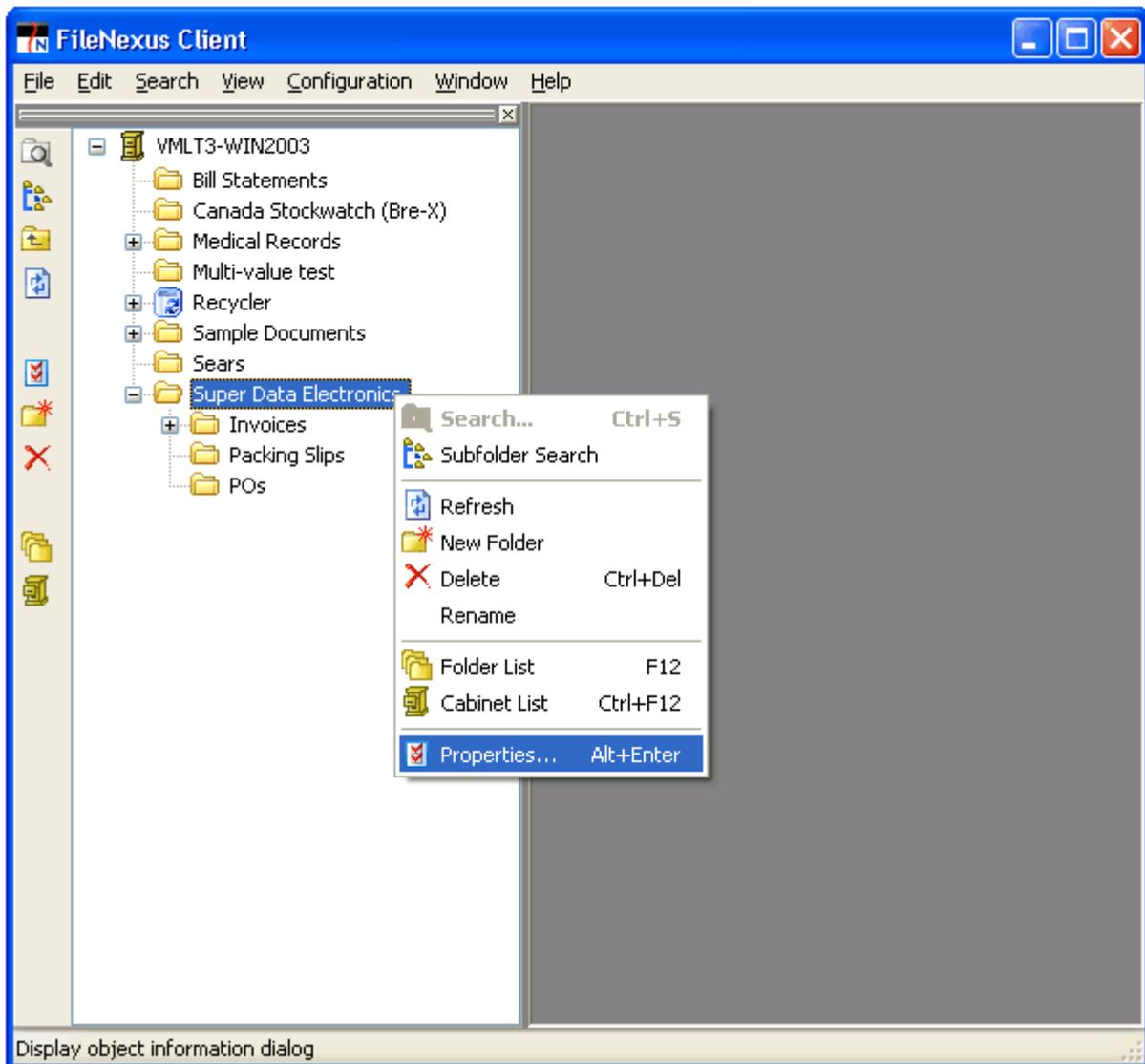
Overview

Folder Administration encompasses the granting of access rights to Users and Groups on documents archived to the FileNexus System. These access rights are also used to determine a user's ability to archive or import documents into the system by using the Scan Station and Client Archiver applications. To administer Folder level security to documents, log into the FileNexus Client as an Administrator and access the Folder Properties of a folder (and optionally its subfolders).

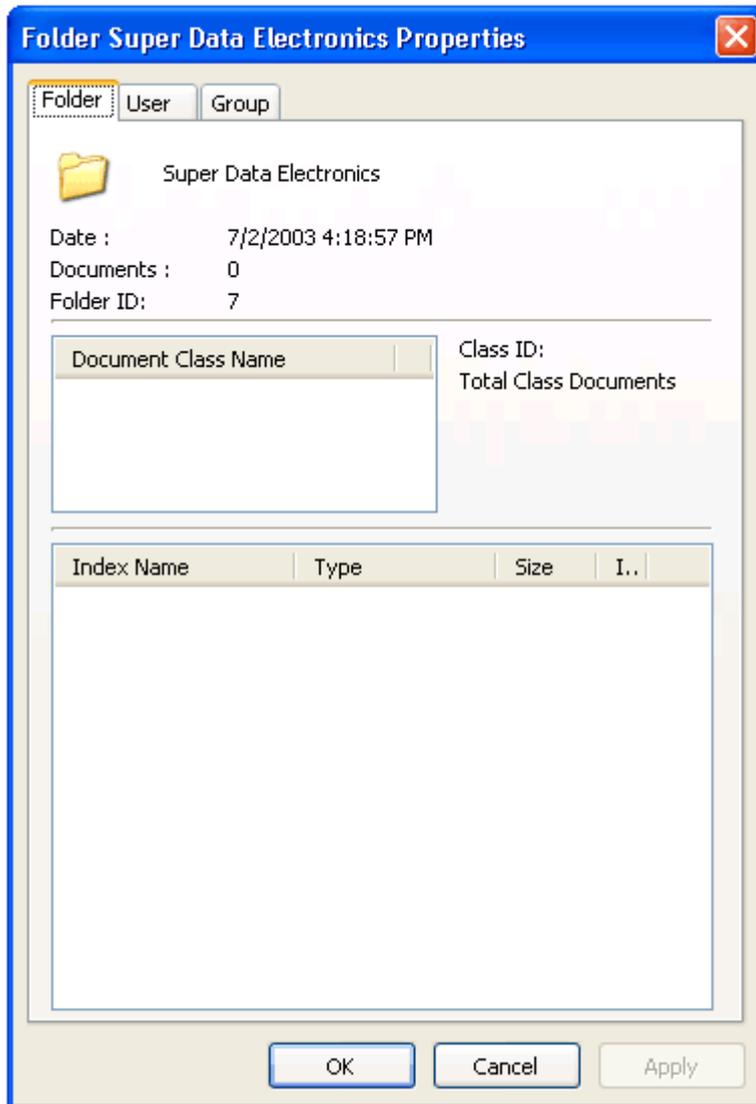
Viewing and Changing Folder Properties

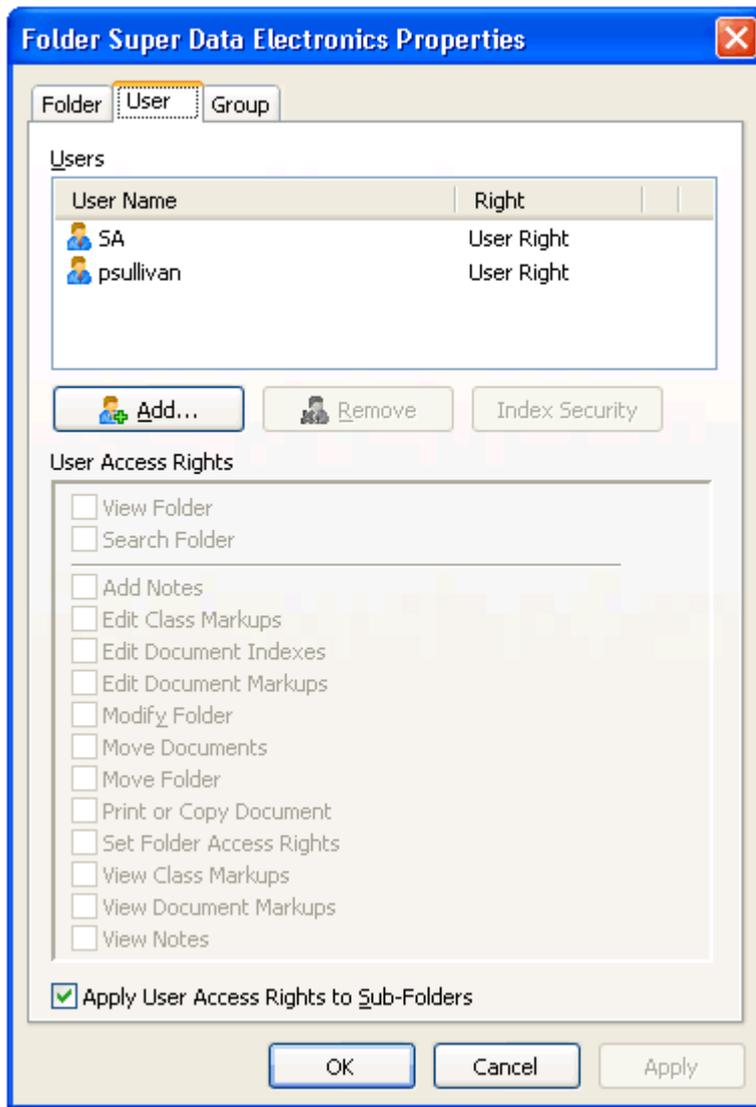
Setting Folder Access Rights

To set access rights on a folder, you can right-click on the folder in the Folder Tree and select *Properties*.



You can now set either the User or Group Access rights by clicking on the appropriate tab.





By selecting the *User* or *Group* tab, you'll be able to view and modify the access rights of the users or groups to documents within the folder. The access rights defined for a particular user or group will appear in the *Access Rights* pane with checkboxes checked on/off next to the specific type of access.

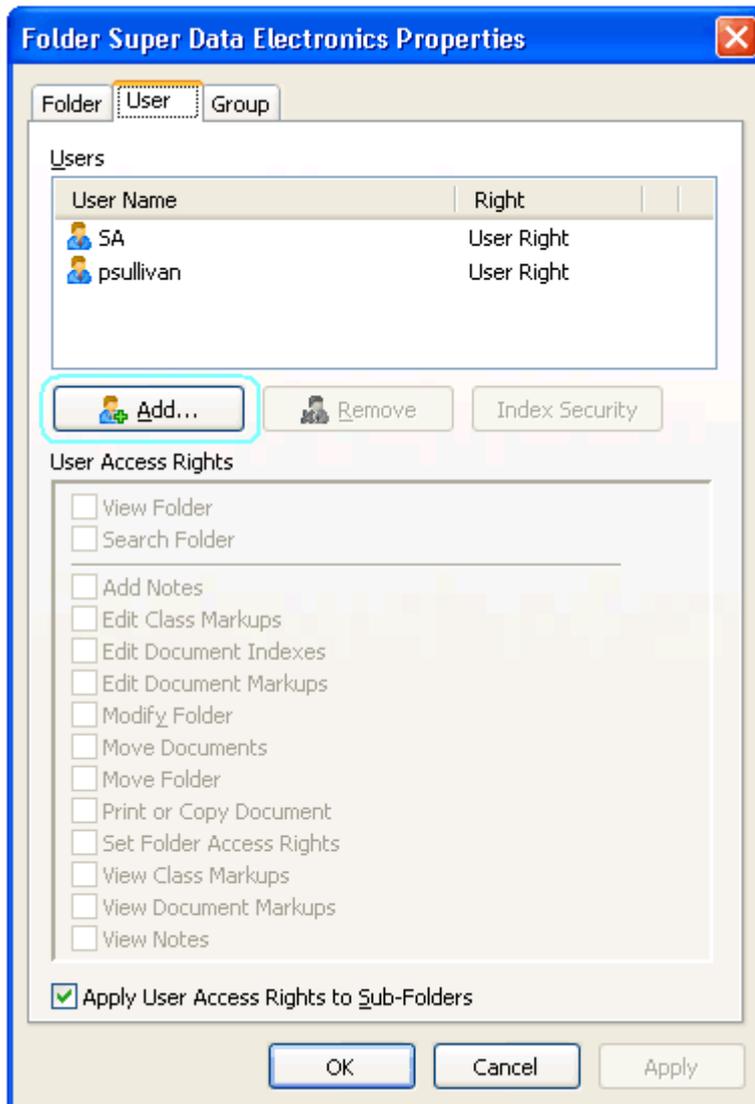
To add a user or group to a folder, thereby allowing them some level of access to the documents within the folder, refer to the following sections:

[Folder Properties User Tab](#)

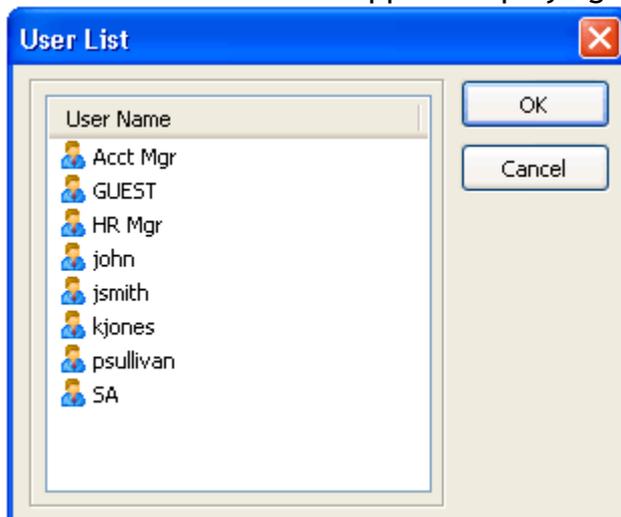
[Folder Properties Group Tab](#)

Adding a User to a Folder

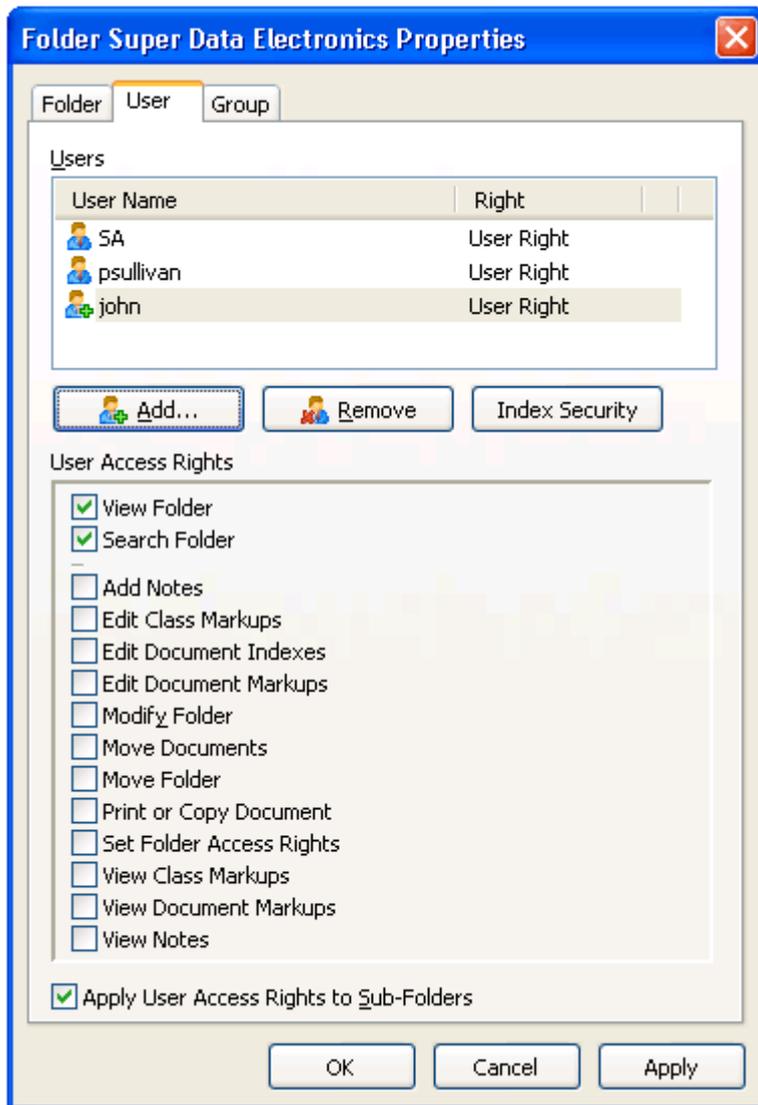
To add a user to a folder, click on the **Add** button on the *User* tab as shown below.



A *User List* window will appear displaying all available FileNexus Users.



From the *User List* window, highlight the user you wish to add to the folder and click the **OK** button. Once the user has been added, you will be able to grant their user access rights for this folder.



By default, when a User is added to a folder they will be given *View Folder* and *Search Folder* rights. If you need to grant any additional user access rights, simply check the box next to the applicable right(s) and click **OK** to save your changes. If you have made an error, click **Cancel** to ignore your changes.

User Access Rights to a Folder - Overview

There are a total of 14 types of user access rights that can be granted. A complete list of access rights is shown below.



User Access Rights

- View Folder
- Search Folder
- Add Notes
- Edit Class Markups
- Edit Document Indexes
- Edit Document Markups
- Modify Folder
- Move Documents
- Move Folder
- Print or Copy Document
- Set Folder Access Rights
- View Class Markups
- View Document Markups
- View Notes

Apply User Access Rights to Sub-Folders

View Folder

Allows a user to view a folder within the FileNexus Client and FileNexus importing applications, such as the Client Archiver and Scan Station. The View Folder right does not allow the user to search for documents within the folder.

Search Folder

Allows a user to search for and retrieve documents in the selected folder.

Add Notes

Allows a user to add text notes or annotations to a scrolling document note window.

Edit Class Markups

Allows a user to add, edit, or delete Class Level markups.

Edit Document Indexes

Allows a user to update the index values for documents within the selected folder.

Edit Document Markups

Allows a user to move, add, delete, or edit Document markups that have been applied to documents within this folder.

Modify Folder

Allows a user to change the name of a folder.

Move Document

Allows a user to drag a document out of this folder and into another folder (useful in work flow situations).

Move Folder

Allows a user to drag this folder to a new location within the Folder Tree.

Print or Copy Document

Allows a user to print documents within this folder or copy parts of a document to the Window's clipboard.

Set Folder Access Rights

Allows a user to change a folder's access rights (i.e. which users can view documents in the folder and what rights they have over the documents that they can view).

View Class Markups

Allows a user to see Class Level markups that have been applied to documents within the selected folder.

View Document Markups

Allows a user to view Document Level markups that have been applied to documents within this folder.

View Notes

Allows a user to view the scrolling document note window for documents within the selected folder.

Applying User Rights to Sub folders

If the folder you are currently modifying has sub folders, you can propagate the changes you make to the folder and its sub folders by checking the **Apply User Access Rights to Sub-Folders** option on the User Tab.



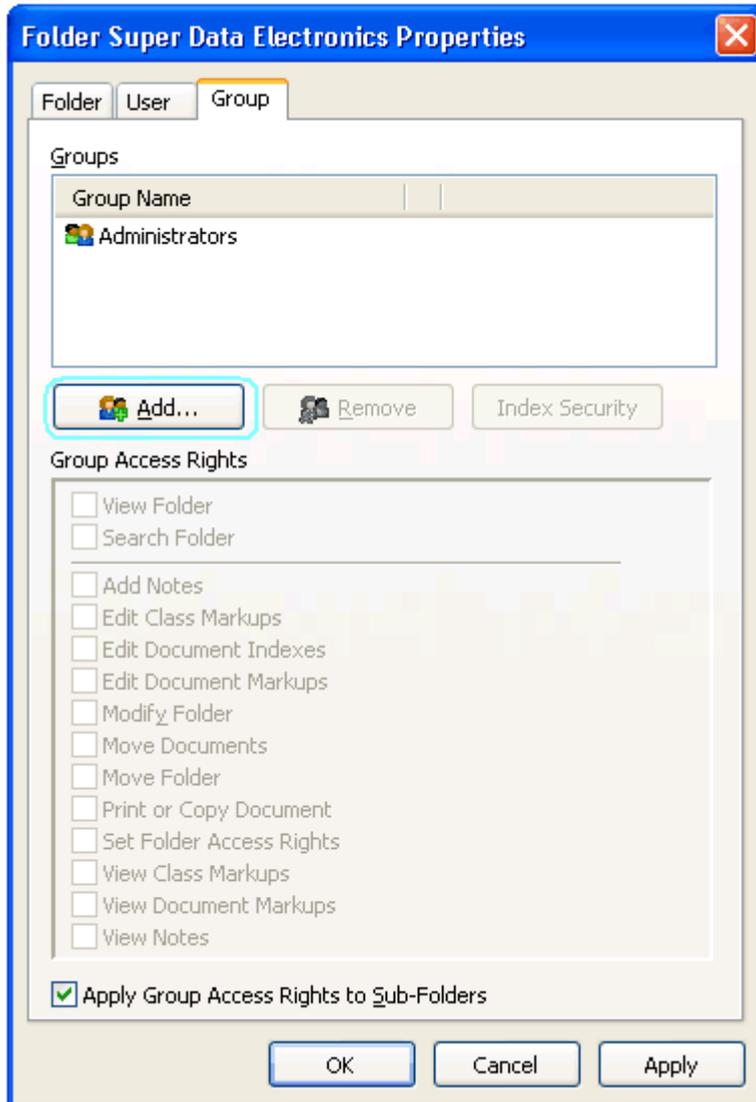
Apply User Access Rights to Sub-Folders

By checking this option, any *existing* sub folders of the folder you are modifying will inherit the same user access rights you've applied to the folder whose properties you are modifying. If you add sub folders to a parent folder at a later date, they will not automatically inherit the access rights of the parent folder.

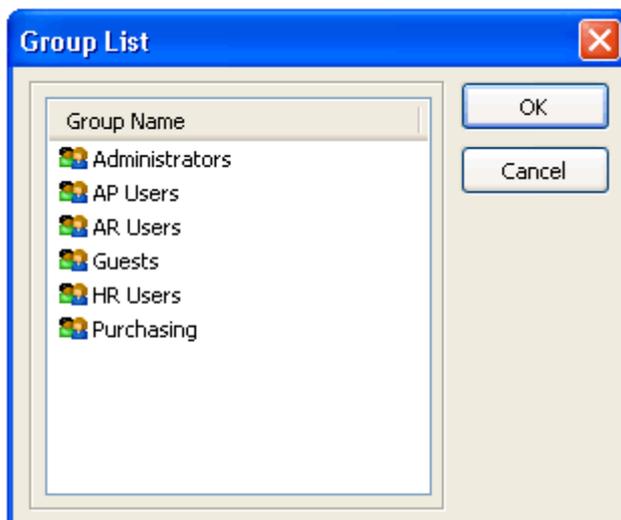
Conversely, if you add user access rights to a folder that is the child or sub folder of another folder, the user will automatically be granted viewing rights to the folder simply to allow for navigation to the sub folder. He/she may not, however, have searching or other access rights to the parent folder unless granted further access.

Adding a Group to a Folder

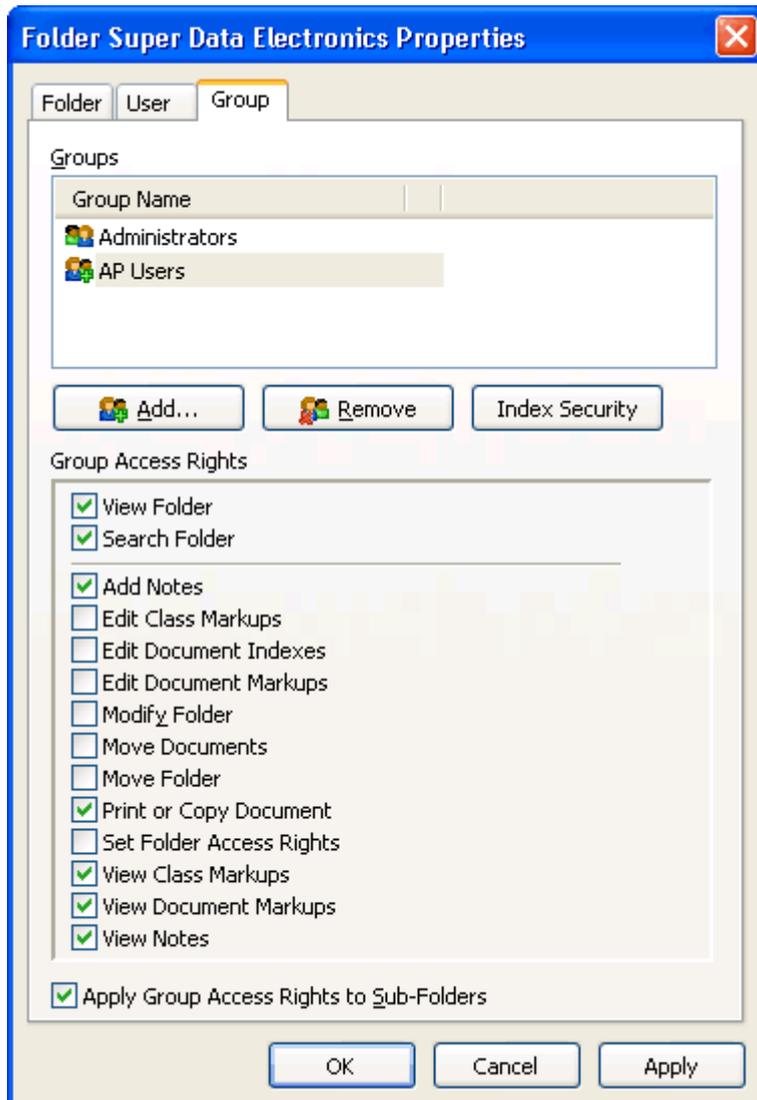
To add a group to a folder, simply click on the **Add** button on the *Group* tab.



By clicking the **Add** button, the *Group List* window will appear.



From the *Group List* window, highlight the group you wish to add to the folder and click the **OK** button. Once the group has been added, you will be able to grant their group access rights for this folder.

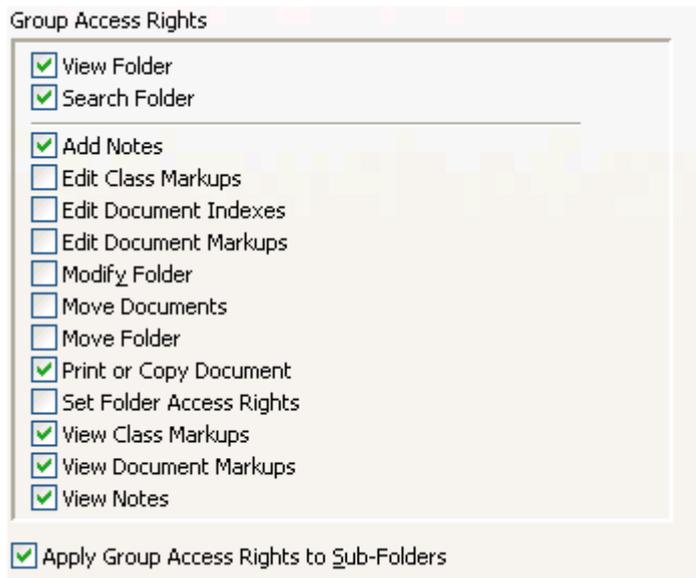


By default, when a Group is added to a folder they will be given *View Folder* and *Search Folder* rights. If you need to grant any additional group access rights, simply check the box next to the applicable right and then click **OK** to save your changes. If you have made an error, click on **Cancel** to ignore your changes.

Group Access Rights to a Folder - Overview

There are a total of 14 types of group access rights that can be granted.

A complete list of access rights is shown below.



View Folder

Allows a group to see a folder within the FileNexus Client and FileNexus importing applications such as the Client Archiver and Scan Station program. The View Folder right does not mean that a user in the group can search for documents within the folder.

Search Folder

Allows a member of a group to search for and view documents in the selected folder.

Add Notes

Allows a member of a group to add text notes to the scrolling document note window.

Edit Class Markups

Allows a member of a group to add, edit, or delete Class Level markups.

Edit Document Indexes

Allows a member of a group to change the index values for documents within the selected folder.

Edit Document Markups

Allows a member of a group to move, add, delete, or edit Document markups that have been applied to documents within this folder.

Modify Folder

Allows a member of a group to change the name of a folder.

Move Document

Allows a member of a group to drag a document out of this folder and into another folder (useful in work flow situations).

Move Folder

Allows a member of a group to drag this folder to a new location within Folder Tree.

Print or Copy Document

Allows a member of a group to print documents within this folder or copy parts of a document to the Window's clipboard.

Set Folder Access Rights

Allows a member of a group to change a folder's access rights (i.e. which users or groups can view documents in the folder and what rights they have over the documents that they can view).

View Class Markups

Allows a member of a group to see Class Level markups that have been applied to documents within the selected folder.

View Document Markups

Allows a member of a group to view Document Level markups that have been applied to documents within this folder.

View Notes

Allows a member of a group to view the scrolling document note window for documents within the selected folder.

Applying Group Rights to Sub folders

If the folder you are currently modifying has sub folders, you can propagate the changes you make to the folder and its sub folders by checking the *Apply Group Access Rights to Sub-Folders* option on the *Group* tab.

Apply Group Access Rights to Sub-Folders

By checking this option, any *existing* sub folders of the folder you are modifying will inherit the same group access rights. If you add sub folders to a folder at a later date, they will not automatically inherit the access rights of the parent folder.

Conversely, if you add group access rights to a folder that is the child or sub folder of another folder, the group will automatically be granted viewing rights to the parent folder simply to allow for navigation to the sub folder. The group may not, however, have searching or other access rights to the parent folder unless previously granted further access.

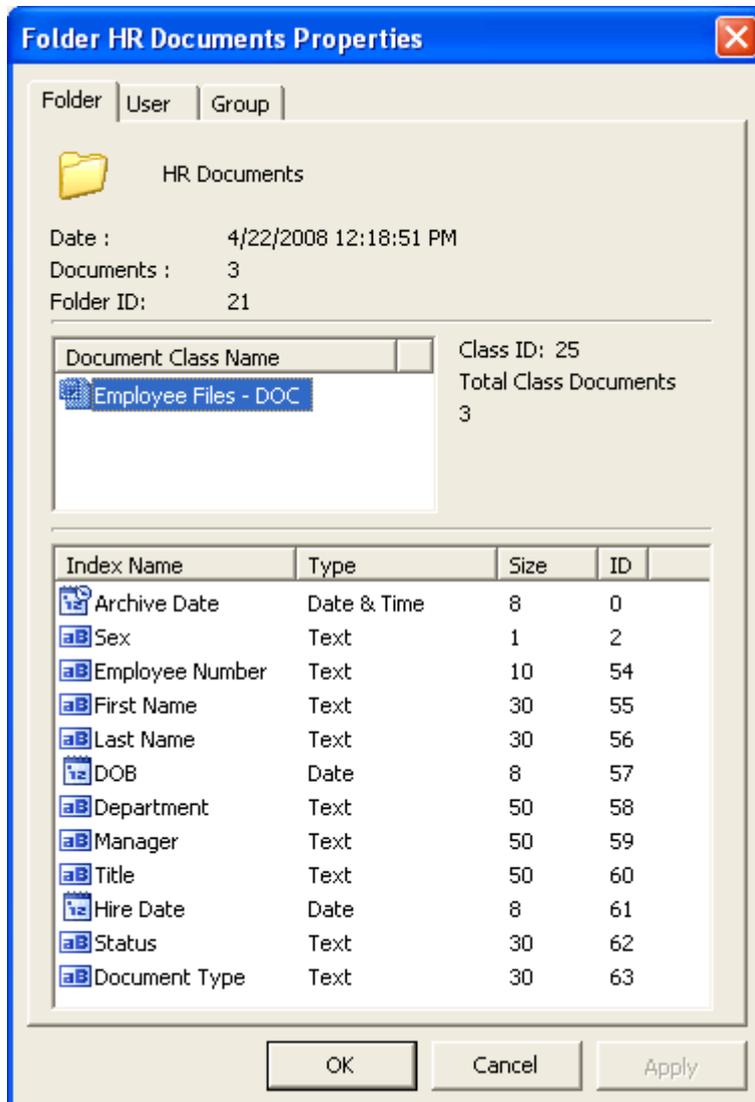
Overview

Previously, the only way of restricting which documents a user or group had access to, was by setting security at the Folder level. Therefore, if a user or group had *View* and *Search* rights to a folder, they could access all of the documents within the folder. *Index Level Security* allows FileNexus Administrators to enhance Folder Level security by restricting a user's or group's access to documents within a given folder based on the value of a specified index or indexes.

For example, if many users from the Sales Department were given Folder Level access to a Quotes folder, a user may only see his/her own quotes within the folder if it had been set up with Index Level Security based on the Author or Contact Name index for the quote.

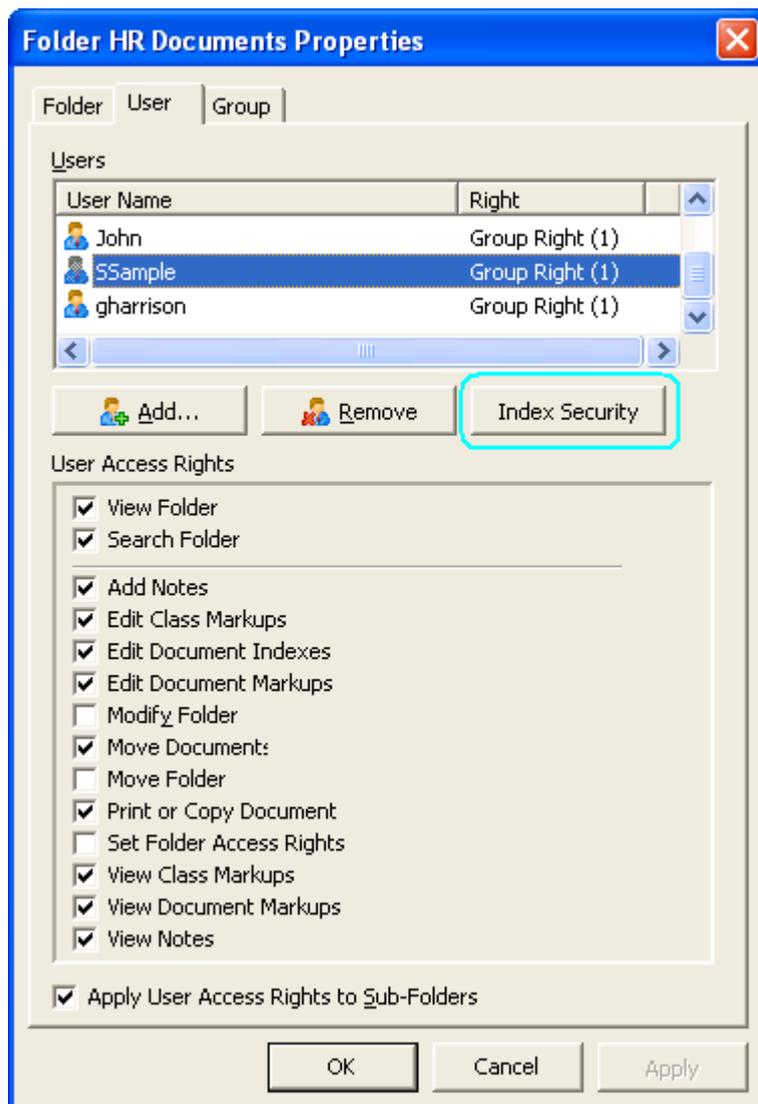
Setting Up Index Level Security

Index level security is applied at the folder level. In order to setup Index Level Security you will need to be in the *Folder Properties* dialog of the folder or parent folder of one or more sub folders, where you wish to apply the security.



If Index Level Security needs to be applied to a user, select the *User* tab. Conversely, if Index Level Security needs to be applied to a group, select the *Group* tab.

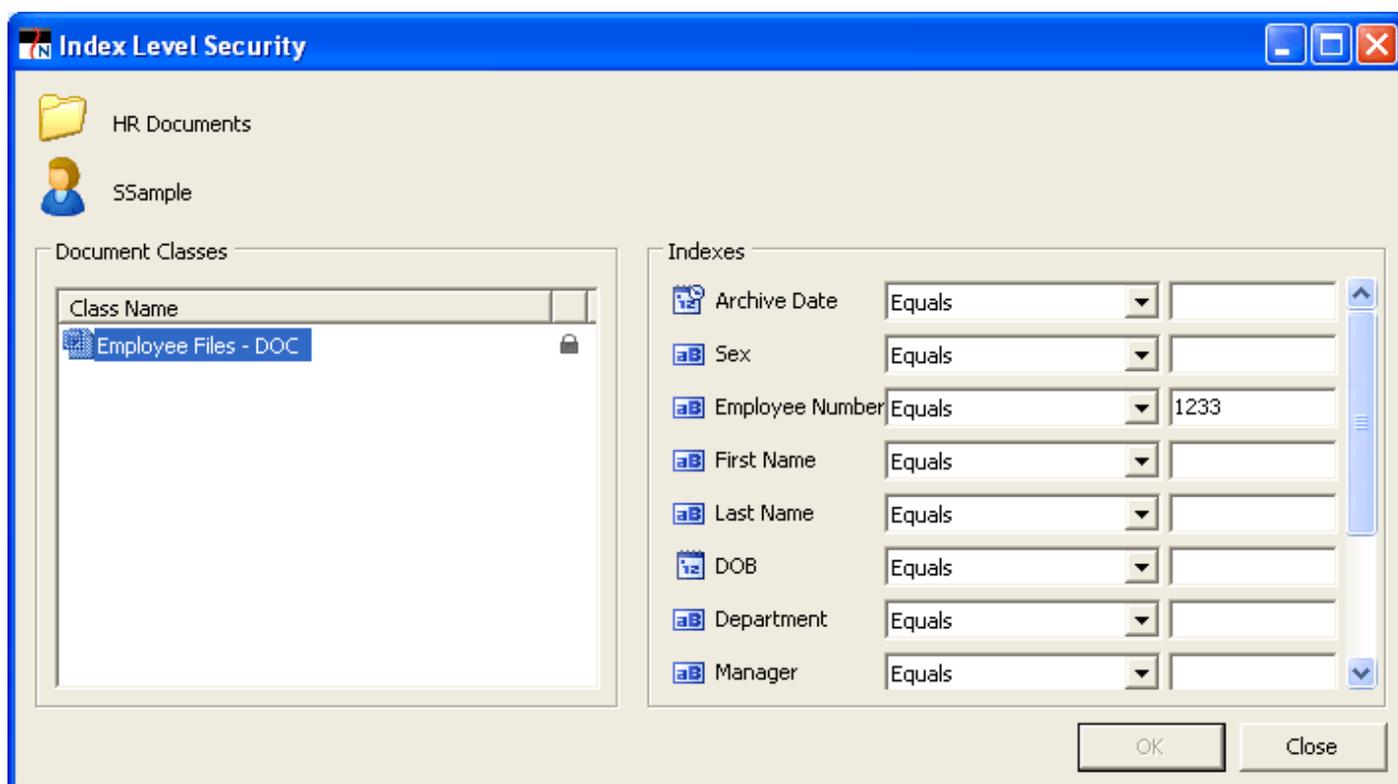
In the example below, we will setup Index Level Security for user SSample. On the *User* tab of the *Folder Properties* dialog, highlight the user and click on the **Index Security** button.



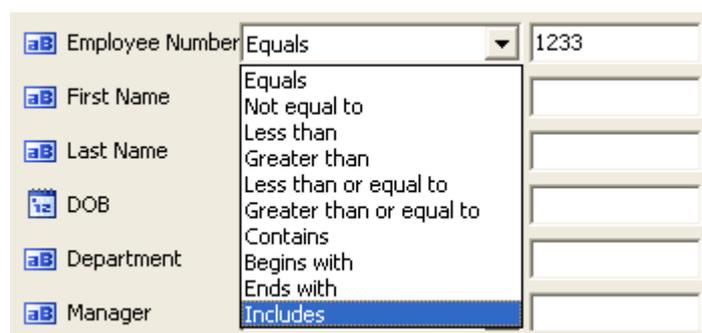
This will open up the *Index Level Security* window.

In the *Index Level Security* window, select the Document Class for which you would like to setup Index Level Security. Once the class has been selected, enter any relevant Index value criteria. The criteria will determine which documents user SSample will be permitted to view. Click on **OK** to save your changes.

In our example below, SSample will be able to search for and view *Employee Files - DOC* documents in the HR Documents folder that have an Employee Number of “1233”. Since SSamples employee ID is “1233”, she will only be able to view her own documents within the folder.

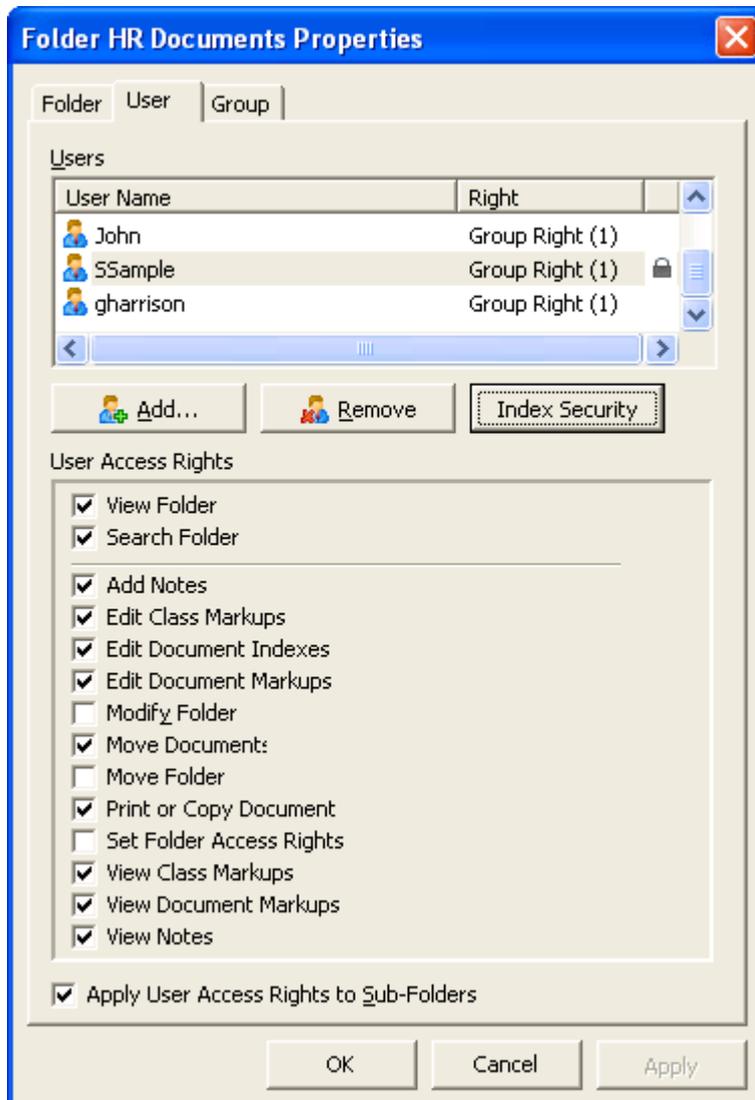


NOTE: The *Operators* drop down list, contains the same operators as the drop down list on the *Index Search* pane with one exception, the “Includes” operator.



The “Includes” operator allows you to enter a series of acceptable index values when setting up index level security, by employing a comma separated list instead of a single value like “1233” in the above example and placing double quotes around each value. For example, “1233,”1234,”1235” is what you may enter in the value edit box provided when using the *Includes* operator.

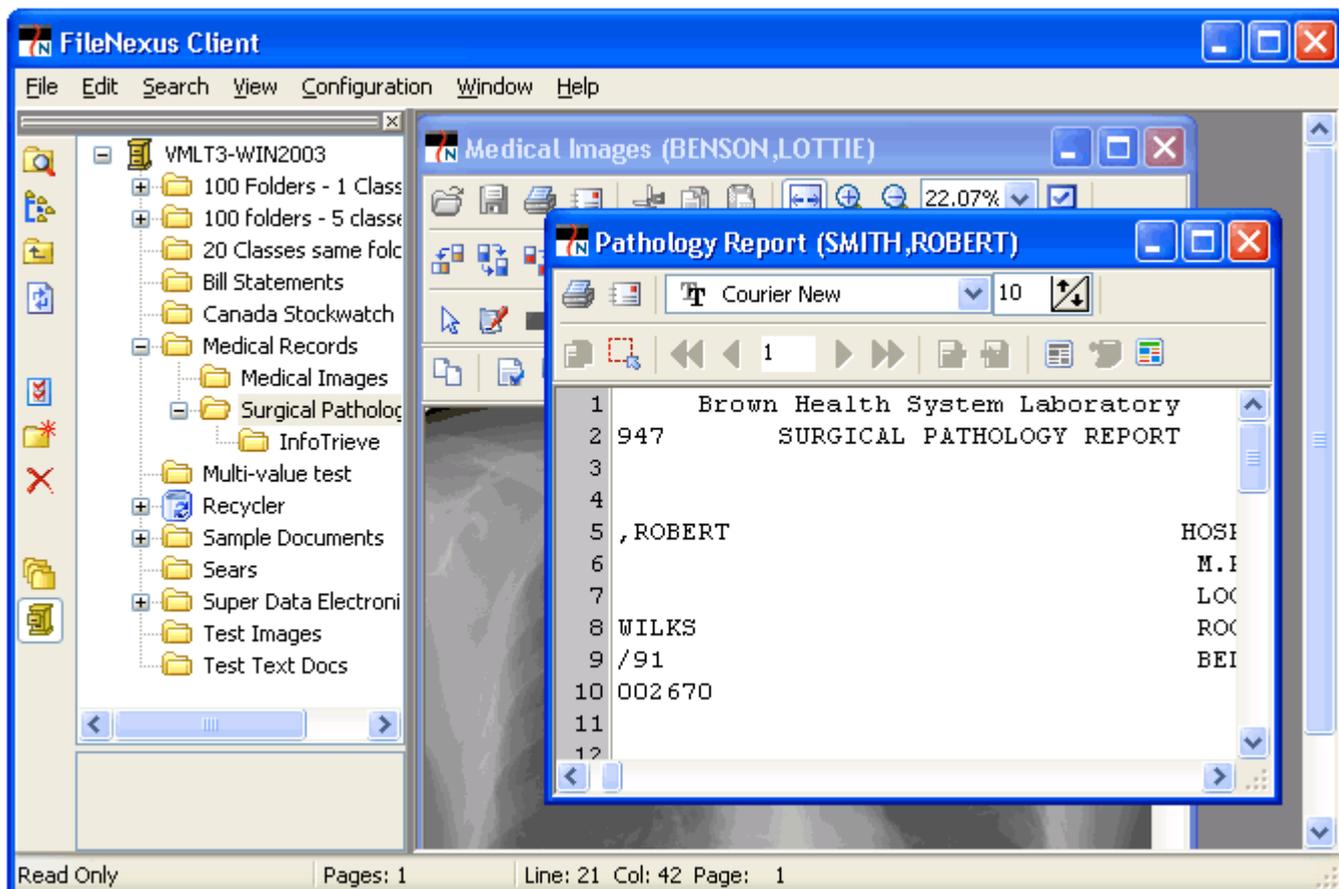
Once you have completed Index Level Security setup, and you return to the *User* tab in the *Folder Properties* dialog, you will now notice that the user *SSample* has a lock icon next to the *Right* column in the *Users* list. This icon indicates that *SSample* has Index Level Security applied to her access rights for documents contained in the HR Documents folder.



To add Index Level Security to a Group, simply replicate the previous steps using the Group Tab.

Overview

The FileNexus Client application provides a simple user interface with a Windows Explorer type folder tree view allowing you to easily search for and retrieve archived documents. It supports a multi-document interface for viewing archived documents. The folder tree view is customizable in order to mimic or enhance your organization's corporate filing system structure and can be toggled on or off as needed. Each folder can contain multiple documents across multiple Document Class types. For example, a Medical Records folder can contain both Pathology Reports (.txt, .pdf, or .tif) as well as X-ray Images (.tif).



FileNexus Client Menus

Each menu item provides a popup menu to manage different aspects of the application.

File	Menu of options for opening (FileNexus document links), saving, login, printing, and exiting the application.
Edit	Menu of two options to Select All search results or Annotate (adding user notes to an archived document) a single selected search result.
Search	Searching options.
View	Options to toggle on/off the view of toolbars, status bar, Folder Tree, Folder List, Cabinet List, Notes, and Properties.
Configuration	Changing passwords, User and Group Administration, and PDF overlay when available.
Window	Options for organizing child windows in the application.
Help	FileNexus applications help options.

The Configuration Menu

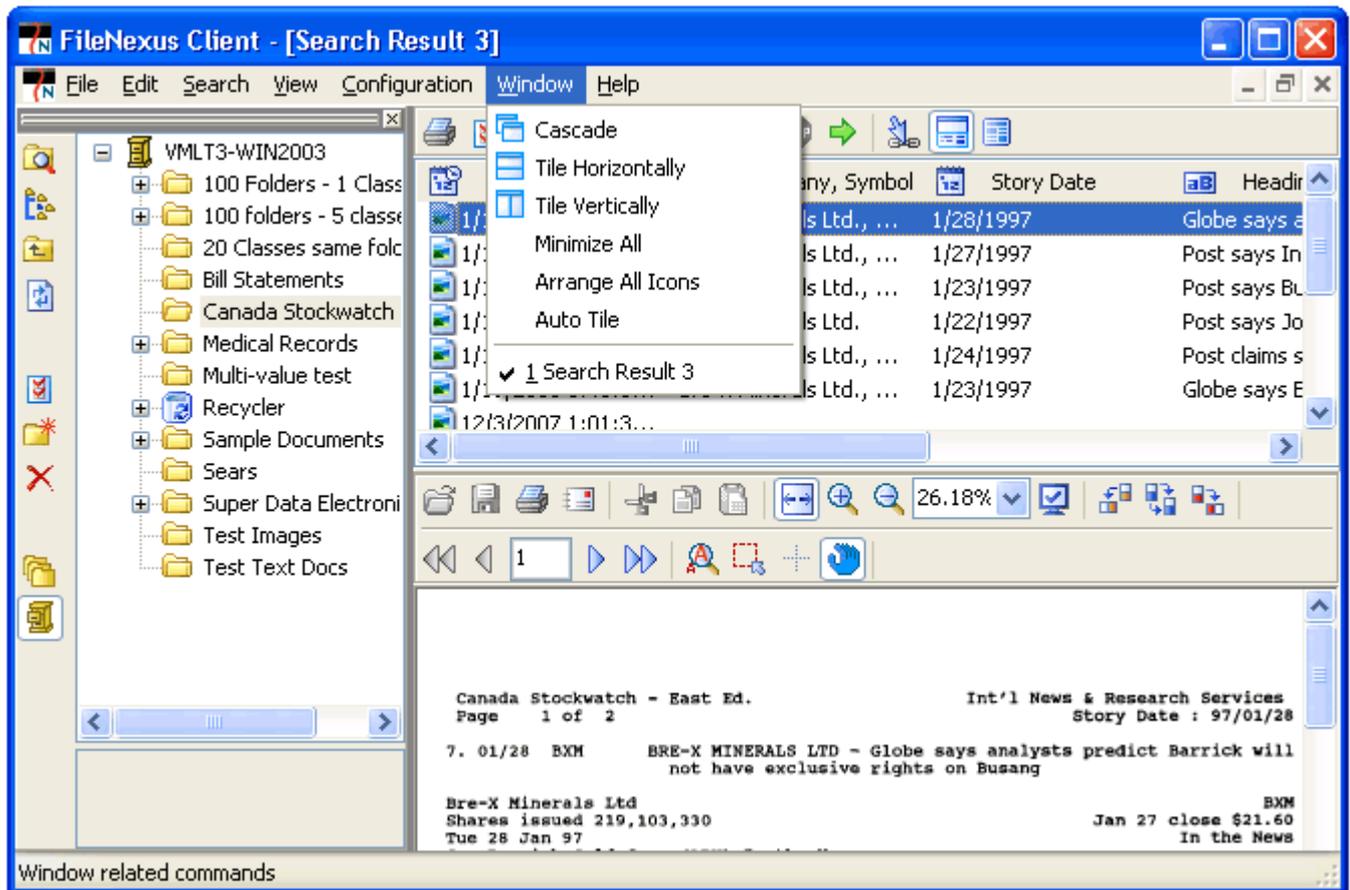
As a FileNexus Administrator, you can select various options from the *Configuration* menu in the FileNexus Client application. You can change your password by clicking on *Password*, or you may need to address FileNexus User and/or Group Administration.



Other administrative tasks can be completed by a FileNexus Administrator or a User with the appropriate Access Rights by accessing and editing the *Properties* of a folder(s)

Window Menu in the FileNexus Client

The Window menu in the FileNexus Client allows you to tell FileNexus how to display the various windows available after searching for an archived document(s).



Cascade

Select this option if you want windows to be cascaded (one window over another).

Tile Horizontally/Vertically

Select these options if you want your screen evenly divided by the number of available windows. If you had four windows open in the application, your screen would be divided into four sections.

Minimize All

Select this option to minimize all windows (the window contents will not be visible).

NOTE: If windows are minimized, they can't be Tiled or Cascaded. You must restore the windows before selecting Tile Horizontally, Tile Vertically, Arrange icons, or Auto Tile.

Arrange ALL Icons

Check this option if you would like FileNexus to auto-arrange the icons on your screen.

Auto Tile

Select this option to have FileNexus automatically tile document windows. For example, if you open up two document windows, each window will take up half of your screen. If you have four documents open, each document will take up $\frac{1}{4}$ of your screen.

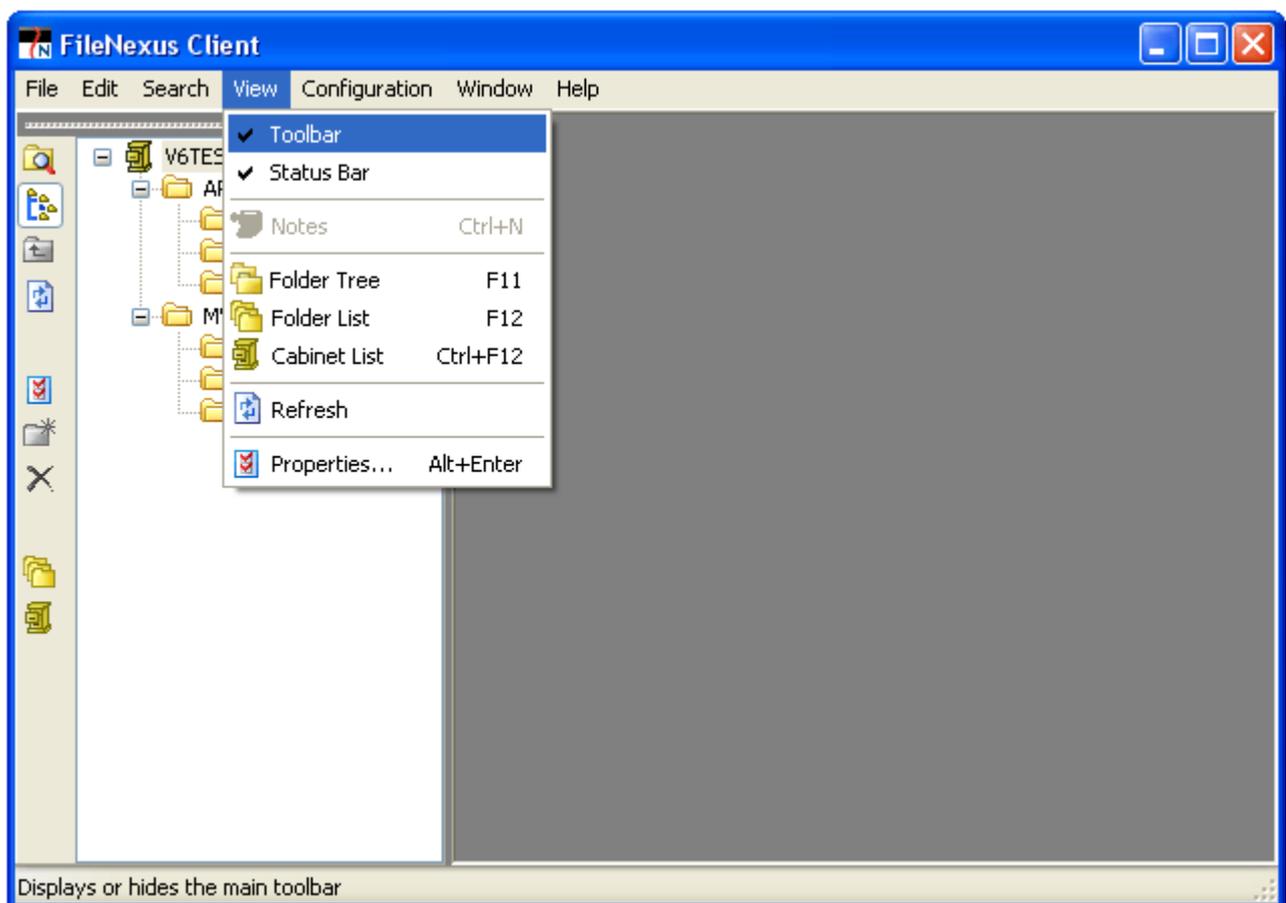
View Menu - Folder Tree

View Menu in the FileNexus Client

The View menu in the FileNexus Client allows the user to decide which panes and views to toggle on and off for display.

Folder Tree

The *Folder Tree* is a Windows Explorer type of view of all folders in the FileNexus Client to which a user has access rights, as well as a side toolbar. You can select *Folder Tree* (or press **F11**) in the *View* menu to toggle on and off the *Folder Tree* view.



Using the Folder Tree

Expanding a tree by clicking on a "+" sign will expand a parent folder and display the child or sub folders. New folders created by another user logged into the FileNexus Client will not be displayed in the Folder Tree until the user logs out and back in or hits the Refresh icon  on the side toolbar.

Only after clicking the refresh icon and expanding the folder tree again will any new folder(s) become visible for users that have access rights to view the folder(s).

Searching

Users can search for archived documents in any folders they have access to that contain one or more documents by double-clicking it, selecting *Search* from the *Search* menu on the client toolbar, pressing **Ctrl+S** when highlighting a folder, or right-clicking on a folder and selecting *Search*.

A [Search Pane](#) is displayed allowing a user to enter search criteria to filter the documents that are retrieved. If a folder is unsearchable by a user, it may not contain any documents or the user may not have the User Access Rights to search within the folder. In either case, the *Search* icon on the side toolbar will appear grayed out or disabled.

A user can conduct sub folder searches when highlighted on a parent folder if the *Subfolder Search* icon  to on the side toolbar of the Folder Tree is toggled on (appears in the down position) before conducting a search in the *Search Pane*. To turn on subfolder searching, click on the **Subfolder Search** icon in the side toolbar or right-click a parent folder and select *Subfolder Search*.

Creating and Modifying Folders

If a user has the appropriate User Access Rights, he/she may create, rename, delete, and move folders in the FileNexus Client's folder tree structure. The ability to modify a folder is set for the individual folder by assigning group or user access rights in the [Folder Properties](#) dialog. Deleting a folder requires modifying access rights to the folder. A user may only delete a folder that does not contain any documents. Renaming a folder also requires modify access rights to the folder being renamed. Changing a folder name will not affect how documents are archived to the folder. Moving a folder is a simple drag and drop of the folder to another sub folder or the root folder. This procedure requires the user to have move access rights on the folder and will not affect how documents are archived to it.

IMPORTANT NOTE: If a folder is deleted and there is a FileNexus process that has documents destined to be archived to that folder, these documents will be archived to the Recycler folder.

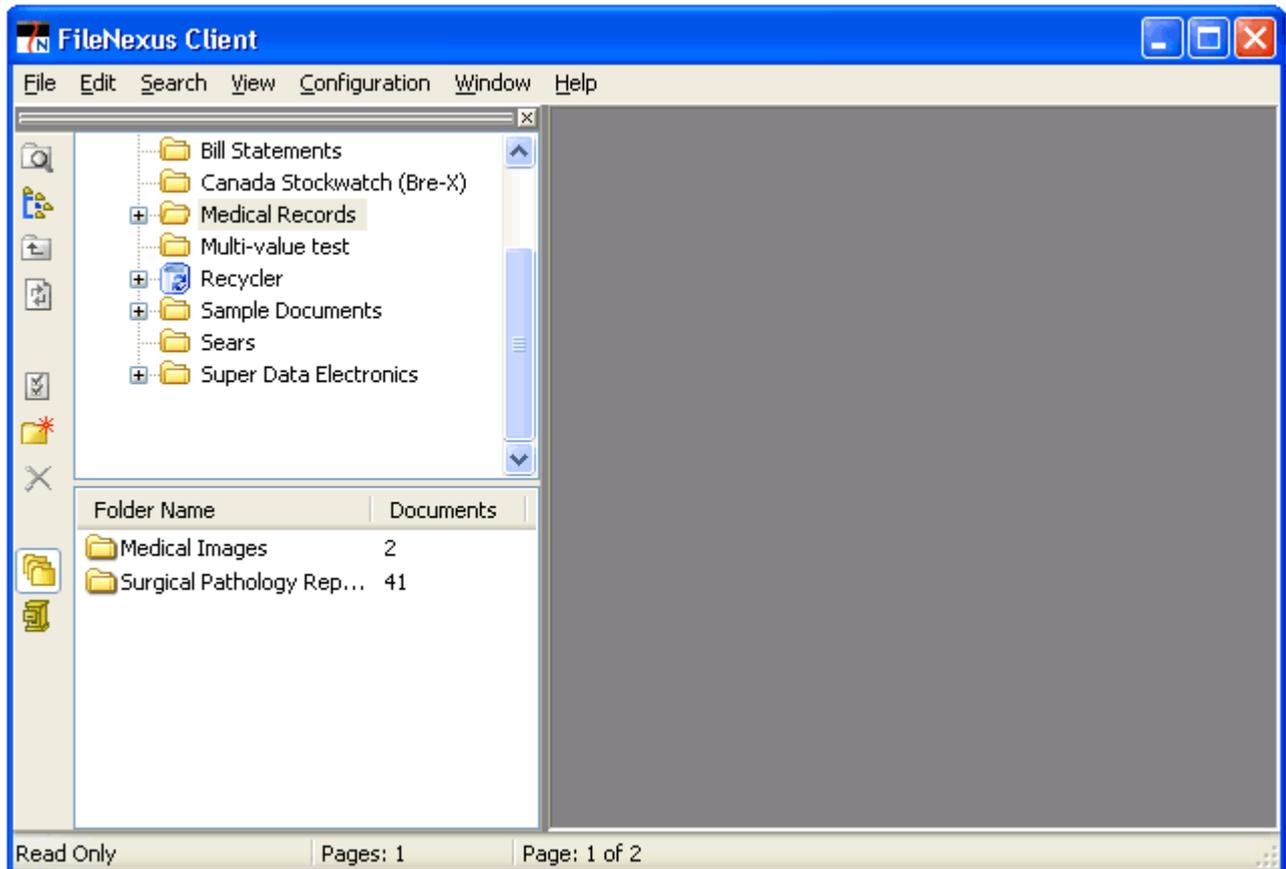
Folder Tree Toolbar

The Folder Tree side toolbar provides quick access to commonly used functions also found in the main menu.

 Search	Click the search button to display the Search Dialog box to enter search criteria.
 Subfolder Search	Check button which indicates if all the sub folders of the selected folder will be searched.
 Up one level	Moves the selection of a folder up one level to the parent folder.
 Refresh	Refreshes the Folder Tree view.
 Properties	Click properties to display the Folder Properties dialog box.
 New Folder	Creates a new folder.
 Delete Folder	Deletes an empty folder.
 Folder List	Shows/hides the Folder List view which displays a list of sub folders (and the number of documents they contain) of the selected folder in the Folder tree.
 Cabinet List	Shows/hides the Cabinet List view which displays a list of personal cabinets the connected user can search.

Folder List

Selecting *Folder List* from the *View* menu, clicking the **Folder list** icon on the side toolbar or pressing **F12**, toggles on and off the *Folder List* view which will also hide/display the *Cabinet List* view if visible. The *Folder List* is a view of the sub folders for a selected parent folder.



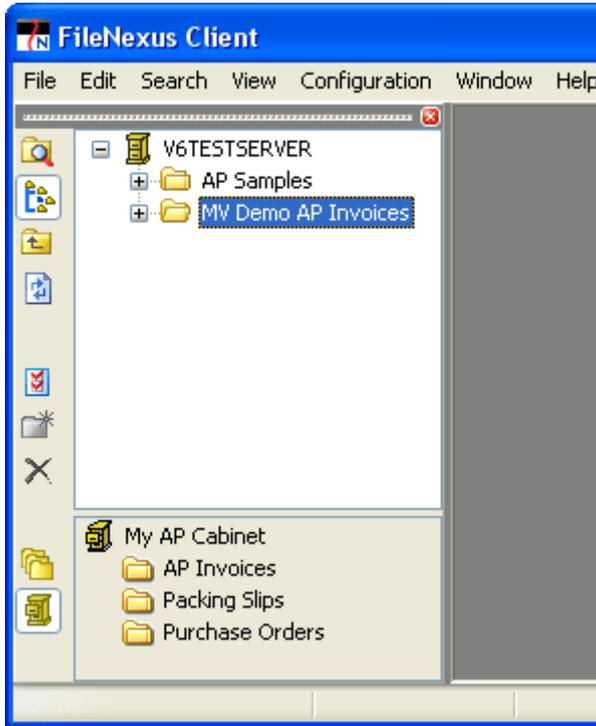
Using the Folder List

The folder list provides a list of sub folders (one level down) of the highlighted folder in the folder tree. The list provides the same functionality as the [Folder Tree](#) and also provides a quick view of the total documents in a folder.

Cabinet List

The *Cabinet List* is a custom filing cabinet of folders the user wishes to search across on a regular basis.

Clicking on the **Cabinet List** icon  or pressing **Ctrl+F12** toggles on and off the *Cabinet List* view and hides *Folder List* view if currently visible.



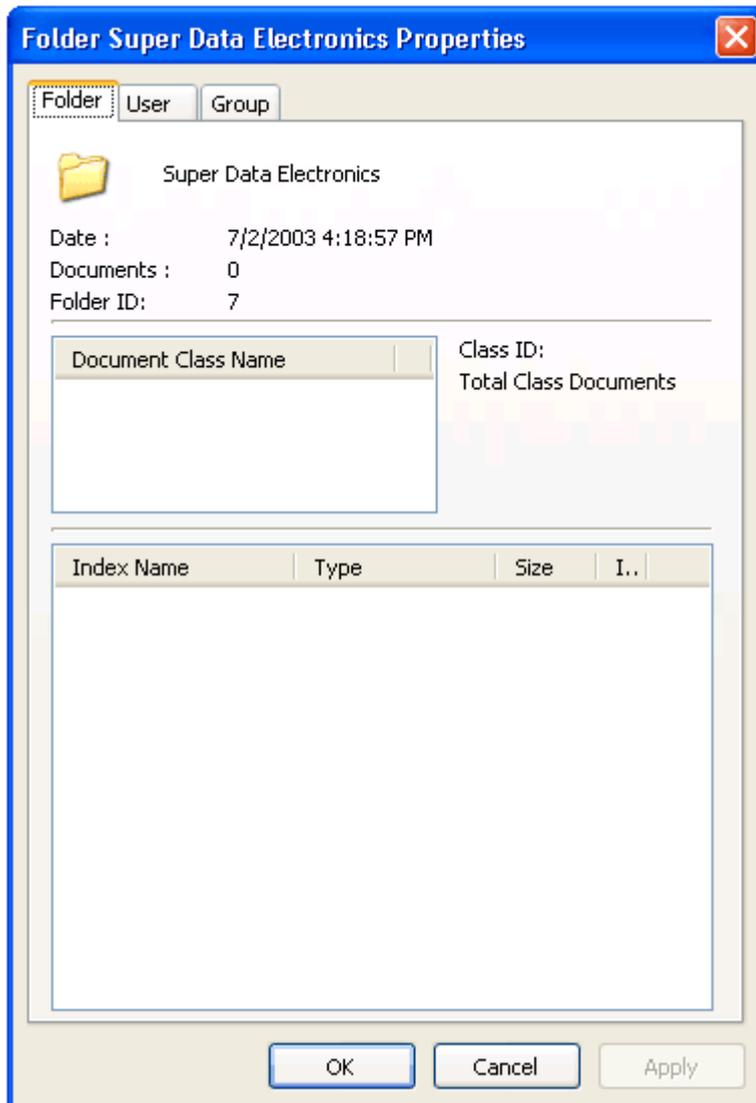
Using the Cabinet List

Some corporations may have hundreds of folders and it may prove tedious to always expand the folder tree structure to find the folders a user regularly searches on. A *Cabinet List* allows each FileNexus user to create custom filing cabinets that contain one or more folders they wish to search.

To create a new cabinet, right click in the gray *Cabinet List* view and click **New File Cabinet**. Then right-click the cabinet and select *Rename* to rename it. You can add folders to the cabinet by dragging them from the *Folder Tree* to the *Cabinet*. A copy of the folder is placed in the cabinet and does not move the folder within the *Folder Tree* structure. Each cabinet can be expanded to display a list of its folders by clicking on the Cabinet icon next to the cabinet name. If a folder is dropped into the wrong cabinet, it can be removed by right-clicking the folder and selecting *Delete*. Each cabinet in the *Cabinet List* can be searched by double-clicking it or right-clicking and selecting *Search*. This will automatically conduct a subfolder search of all folders within the cabinet without having to click on the **Subfolder Search** icon. In addition, a selected individual folder contained in a cabinet can be searched in the same manner.

Folder Properties

To access the *Folder Properties* dialog you must highlight the folder in the folder-tree and select *Properties* from the *View* menu or click the **Properties** icon on the side toolbar. In this dialog there are three tabs.



Folder Tab

The folder tab provides detailed information about the folder and the document classes that may exist in the folder. Along with the date and time the folder was created, the total number of documents in the folder, a list all document classes for the documents that exist in the folder, and the indexes for those document classes can be accessed through the Folder tab. Selecting the name of a document class from the list displays the index values associated with the document class and provides the total number of documents archived to the class (not the folder). The *User* and *Group* tabs of the *Folder Properties* dialog are visible only to users with "Set Folder Access Rights" permission on the folder.

User Tab

The user tab contains a list of users that have access rights to the folder. It allows the modification of user access rights and index level security on the folder and the documents contained in the folder.

Group Tab

The group tab contains a list of groups that have access rights to the folder allows the user to modify the group access rights and index level security to the documents in the folder.

For more information on *Folder Properties*, refer to the section on [Folder Administration](#).

Overview

Searching for and retrieving documents in FileNexus can be accomplished in a variety of ways. For example, you can search for documents based on their archive date (the date on which they were archived into FileNexus), on a specific index value (i.e. invoice number = 12345), a range of index values (using Advanced Searches), or finding related or support documents based on an index value (i.e. finding the Purchase Order, Packing Slip, Invoice, and Cheque based on a PO number or Invoice number).

The following sections will help you to understand and accomplish your document searching needs.

[Search Pane](#)

[Pick-list Searches](#)

[Multi-value Index Searches](#)

[Advanced Searches](#)

[Cross-Folder Searches](#)

[Document Class Specific Searches](#)

[Filing Cabinet Searches](#)

[Searching Full Text Indexed Documents](#)

To understand and manage your search results, please refer to the section on the [Search Results Window](#).

The FileNexus Client Search Pane

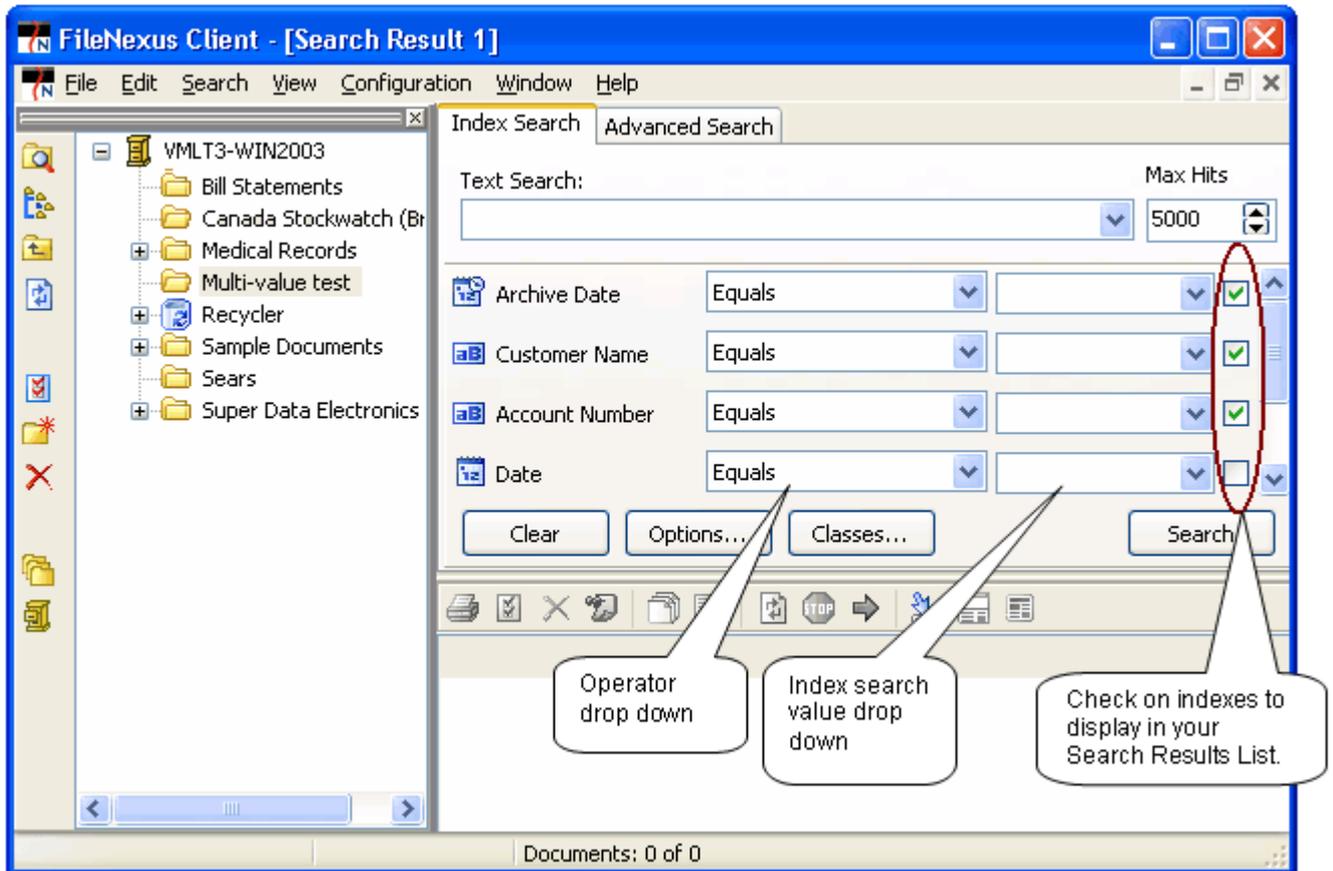
The Search Pane can be invoked in several ways; clicking the **Search** icon on the left-hand toolbar, double-clicking a folder, right-clicking a folder and selecting *Search*, or pressing **Ctrl+S** when a folder is selected. This dialog provides the ability to search for and retrieve documents in one or more FileNexus folders.

[Index Search Tab](#)

The *Index Search* tab provides full-text searching (if available) and the primary search method of searching by one or more index values.

[Advanced Search Tab](#)

The *Advanced* tab provides the ability to search using complex searches like meeting one search criteria **OR** another search criteria, searching on several date ranges, or creating and saving searches that can be saved and reloaded.

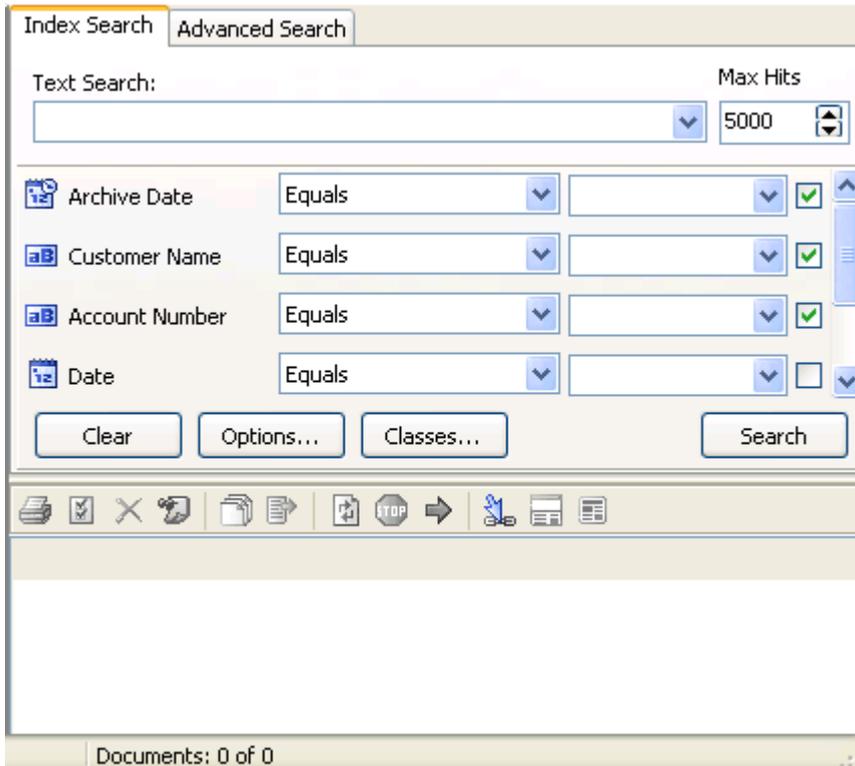


Searching Methods

The *Search Pane* has two possible methods of searching; full-text searching (if you have the Full-Text module) and index searching. These methods can be used singularly or in combination.

Index Search Tab

The *Index Search* tab is the active tab viewable by default. It provides full-text searching (if available) functionality and the primary search method of searching by one or more Index values.



Text Search

The string you enter in this edit box will be used to conduct a content search within full-text indexed archived documents. The document types that can be full-text indexed may include but are not limited to Text, Word docs, Excel spreadsheets, some PDFs, etc.

Max Hits

This is the total number of documents that will be displayed before a full-text search will terminate. There is no *Max Hits* displayed for non full-text searches. By default, this value is set to a maximum of 5000 results, but it can be adjusted by a FileNexus Administrator.

The number and type of index values available for searching will vary by document class being searched. For each index, there will be an operator drop down, an index search value drop down and an index display checkbox.

Operator drop down

The operator drop down box contains a list of operators that will be used to compare against the value of an index if search criteria is entered.

Operator	Description
Equals	Index value equals search criteria
Not equal to	Index value does not equal search criteria

Less than	Index value is less than search criteria
Greater than	Index value is greater than search criteria
Less than or equal to	Index value is less than or equal to search criteria
Greater than or equal to	Index value is greater than or equal to search criteria
Contains	Index value contains the search criteria
Begins with	Index value begins with the search criteria
Ends with	Index value ends with the search criteria
Between	Index values are between two search criteria

NOTE: *Contains*, *Begins with*, and *Ends with* are only available for Text data type indexes. *Between* is only available for numeric and date data type indexes.

Search Examples

Although most operators are straight forward and require exact values, some operators can accept partial values for searching. See the below examples for *Contains*, *Begins with* and *Ends with*.

- If you have a Name index and want to search for all the documents where the name is John Joe Smith, your search will be Name *Equals* "John Joe Smith".
- If you want to search for all the names that start with John, your search will be Name *Begins with* "John"
- If you want to search for all the names that end with Smith, your search will be Name *Ends with* "Smith"
- If you want to search for all the names that contain the word Joe, your search will be Name *Contains* "Joe"

Index Search Value drop down

Enter your search criteria for the associated index. For example, you might search for documents whose Customer Name index equals "Karen Jones" as in the below example.

The image shows a search interface with a label 'Customer Name' on the left. To its right is a dropdown menu currently displaying 'Equals'. Further right is a text input field containing the text 'Karen Jones'. To the right of the input field is a small green checkmark icon.

In the above example, the drop down will keep a history of up to the previous five search criteria used for this index. So the next time you search on documents belonging to the same document class, Karen Jones will appear as search criteria for the Customer Name index until you blank out the value or enter a different one and hit the **Search** button to run the search.

IMPORTANT: If the index is set up for **Pick-list** searching (i.e. there is a pre-populated set of values to select from rather than needing to key in search criteria for an index), no history of previous search criteria will persist for the index.

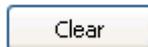
Index Search Tab

The screenshot shows the 'Index Search' window with the 'Advanced Search' tab selected. At the top, there is a 'Text Search:' field and a 'Max Hits' dropdown set to '5000'. Below this are four search criteria rows: 'Archive Date', 'Customer Name', 'Account Number', and 'Date'. Each row has an 'Equals' dropdown, an empty value field, and a checkbox. The checkboxes for 'Archive Date', 'Customer Name', and 'Account Number' are checked, while the checkbox for 'Date' is unchecked. At the bottom of the criteria section are buttons for 'Clear', 'Options...', 'Classes...', and 'Search'. Below the buttons is a toolbar with various icons. At the very bottom, a status bar reads 'Documents: 0 of 0'.

Display Index Checkboxes

Checking these on and off allow a FileNexus user to determine which indexes they wish to display in their *Search Results Grid* after running a document search.

Clear



Clicking this button will empty any entered search criteria in the Index value drop downs as well as any search query entered on the *Advanced Search* tab.

Options



Clicking on the **Options** button will open the *Search Options* window.

The 'Search Options' dialog box has a blue title bar with a close button. It contains a 'Search Title' section with a text field containing 'Search Result 1'. Below that is a 'Search Options' section with four checkboxes: 'Use All Search Tab Values' (checked), 'Persistent Search Values' (checked), 'Lock Search Indexes' (unchecked), and 'Auto Select Archive Date Index' (unchecked). At the bottom are 'OK' and 'Cancel' buttons.

Search Title

This edit box allows a user to name a search result if he/she plans to run many document searches and wishes to distinguish between each *Search Result List*.

Persistent Search Values

By default, this option is checked (ON). This means that FileNexus will track up to 5 of a User's previous search criteria in the Index Search Value drop downs. Additionally, the previous search criteria used for a document class or index will appear in the Index Search Value drop downs until the user clears the search criteria.

Lock Search Indexes

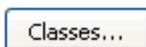
By default, this option is checked (ON). When checked, the user cannot reorder indexes on the *Index Search* tab of the search pane and the index order of display in the *Search Results Grid* will appear in the same order as on the *Index Search* tab. If unchecked, a user can reorder the indexes on the *Index Search* tab by dragging and dropping the index name to the desired location. Users may find a particular index order easier to enter search criteria and the indexes will display in the same order as on the modified *Index Search* tab for easier viewing.

Auto Select Archive Date

This option when checked (ON) will result in the Archive Date always displaying as one of the indexes returned in a *Search Results Grid*. When unchecked, a user can elect to toggle on/off the display of the *Archive Date* in the *Search Results Grid* at will.

Once you have completed editing your search option in the Search Options window, click **OK** to accept your changes or **Cancel** to ignore any changes.

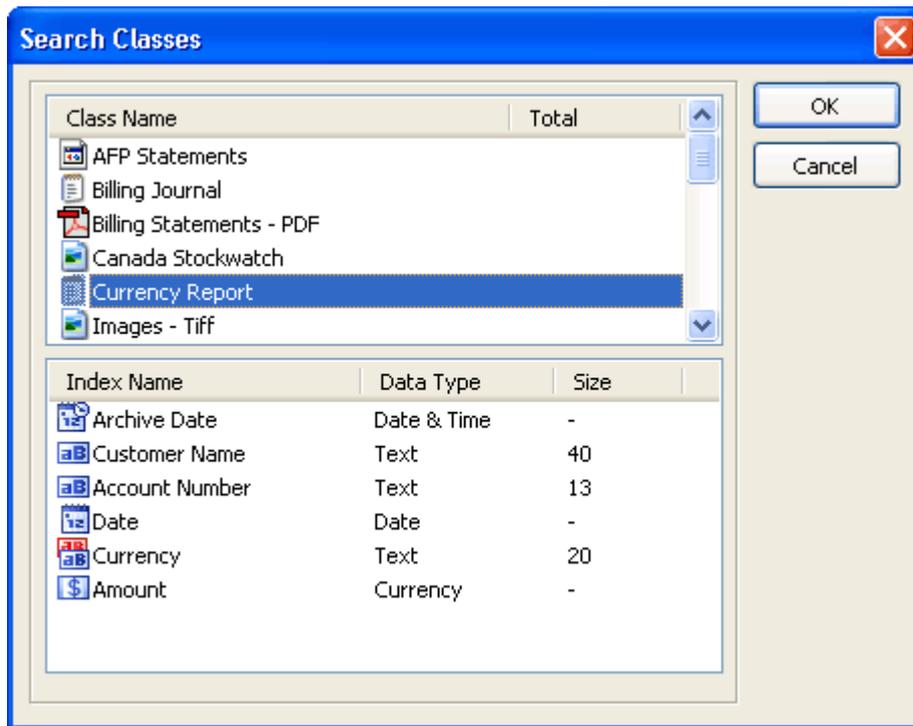
Classes



When clicked will open up a *Search Classes* dialog.

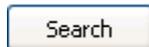
Search Classes Dialog

The *Search Classes* dialog allows a user to filter which document classes to search across when conducting a search for documents in one or more folders.



To limit which *Document Classes* to include in a search, simply highlight one or more classes in the *Class Name* list box and hit **OK**. If you highlight a single *Document Class*, as in the above example, index information like data type and index size will be displayed in the bottom *Index Name* pane. When you hit **OK**, you will return to the *Index Search* tab of the Search Pane.

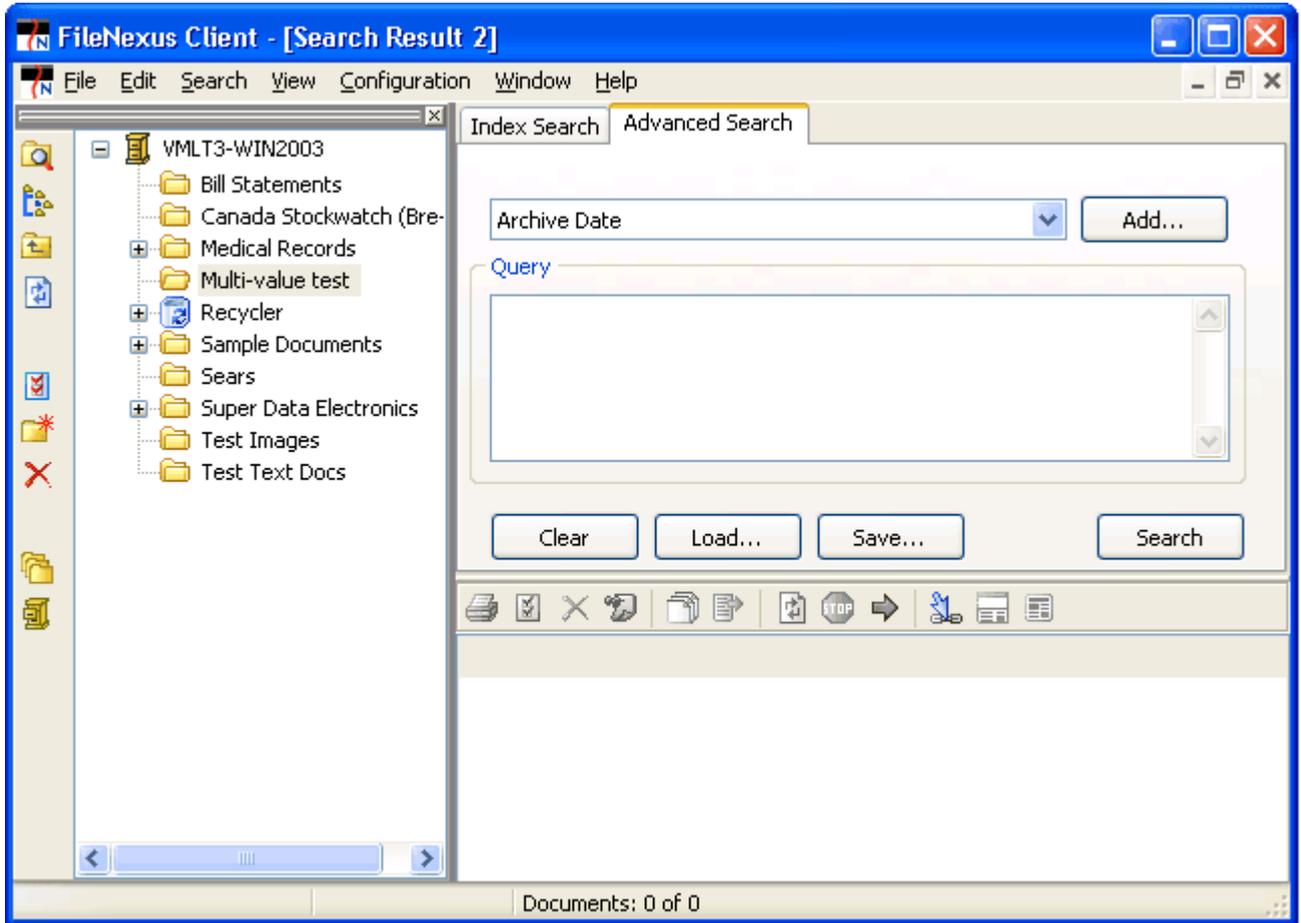
Search



Will run a search against the highlighted folder (and subfolders if applicable) using the entered search criteria. The results or matching documents will be returned in a *Search Results Grid* for the user.

Advanced Tab

The Advanced tab provides the ability to search for documents using complex searches like finding documents whose date index falls between several ranges of dates, searching for ranges of index values, and searching for documents where one search criteria is met OR a different criterion is met. Additionally, these more complex searches can be saved and reloaded as necessary.



Advanced Searches

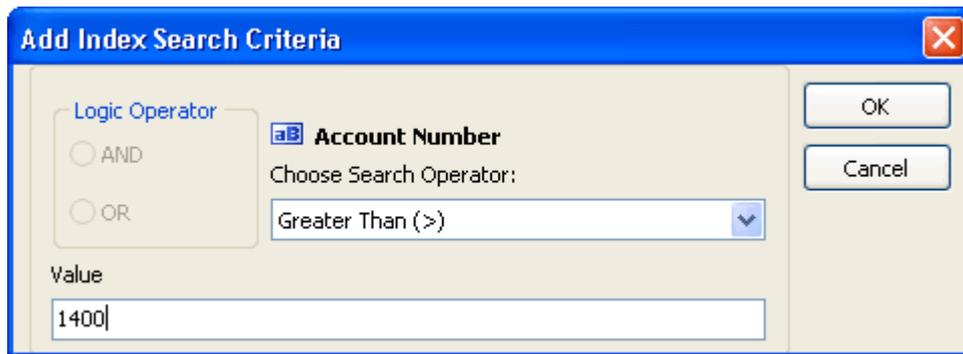
Overview

Advanced searches allow you to specify more complicated search parameters. For example, you can search for all of the employee files archived on October 16, 2005 and whose employee name starts with "J" and ends with "Smith".

To Build an Advanced Search Query:

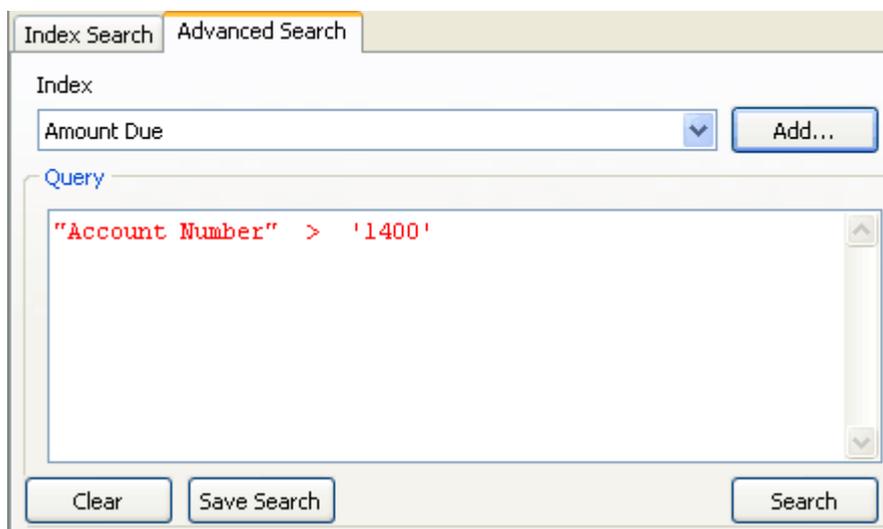
1. On the *Advanced* tab, select the first index that you want to perform a comparison against (Account Number for example) and click **Add**.

2. The Add Index Search Criteria window will open.



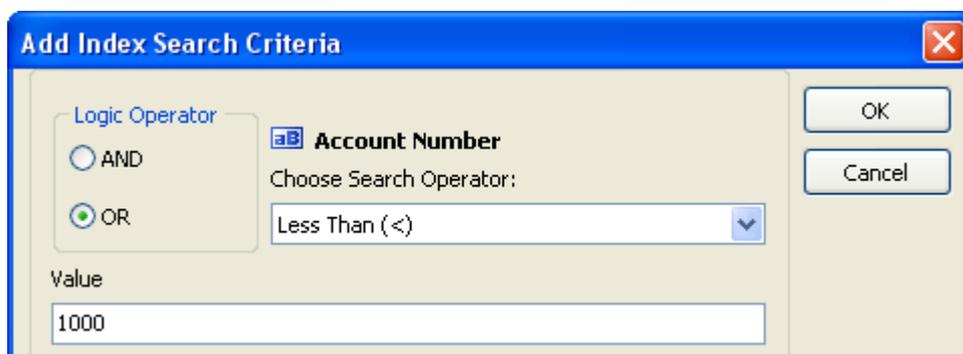
Select the appropriate operator (Greater Than) from the *Choose Search Operator* drop down and then enter a value (1400) in the *Value* edit box. Click **OK** when you're finished.

3. This will return you to the *Advanced Search* tab that should look like the example below.

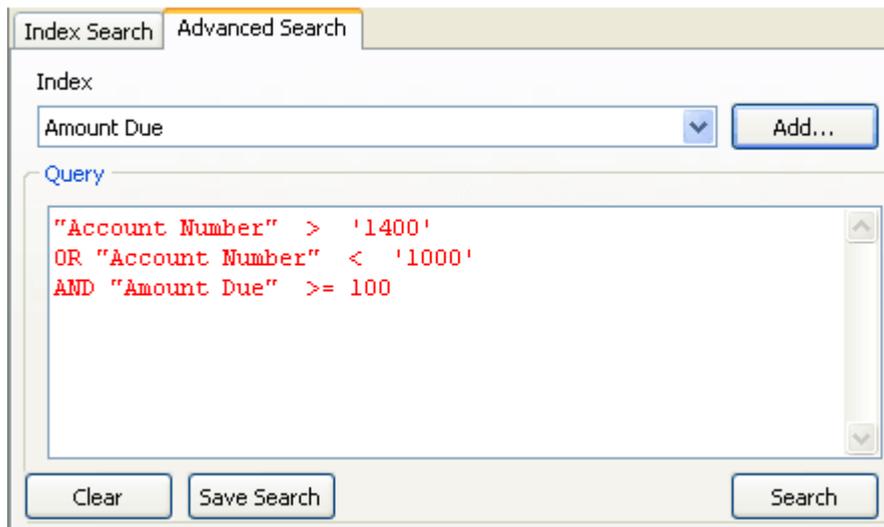


Click on the **Add** button again to continue building the query.

4. Select *OR* in the *Logic Operator* pane of the *Add Index Search Criteria* window. Next, select *Less Than* and enter the value *1000* before hitting **OK**.

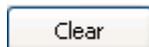


This information gets added to the search query window. If you have additional search criteria to include, then select an Index, click **Add**, and repeat steps 3 and 4 until your query is complete.



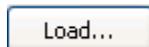
5. When you have finished building your query, click on the **Search** button to retrieve your search results. If you have a query that you use frequently, you can save it by clicking on the **Save** button. The next time you want to use a saved query, click on the **Load** button from the *Advanced Search* tab and select your saved query - it's that simple!

Clear



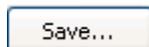
Clicking this button will empty any entered search criteria in the Index value drop downs as well as any search query entered on the *Advanced Search* tab.

Load



Clicking this button allows a user to open a saved search query and re-run it.

Save



Clicking this button allows a user to save the current entered query to be reused at a later time.

Search



Will run a search against the highlighted folder (and subfolders if applicable) using the entered search criteria. The results or matching documents will be returned in a *Search Results Grid* for the user.

NOTE: If you do not want an advanced query to be used each time you search in FileNexus, be sure to return to the *Advanced* tab and clear out the *Query* pane (delete any text found in the pane or press the **Clear** button) so that the criteria does not get applied to subsequent searches.

Pick-list Searches

In version 6 of FileNexus, users are now able to employ pre-populated pick-lists in the *Index Search* pane of the FileNexus Client. Pick-lists are pre-populated index drop downs in the *Index Search Pane* of the FileNexus Client. These pre-populated drop-down menus allow users to select from valid search values for an index without having to remember search criteria or key it in.

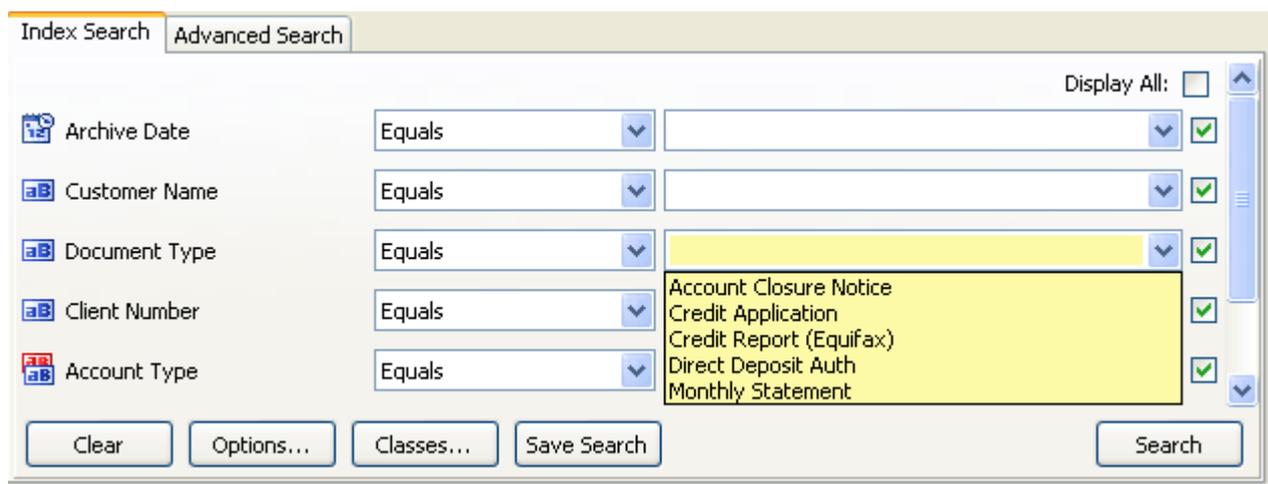
Setting Up Pick-lists

Pick-lists should be set up only for indexes that will have a limited number of archived values. For example, if you had a *Customer Name* index on a *Billing Statements* document class, you would NOT set this index up as a pick-list as the list of values could grow by the thousands. However, if you had an *Account Type* index on *Billing Statements*, this may only ever have 5 - 10 possible values, and therefore would be a good candidate for which to set up a pick-list.

Pick-list searching in the FileNexus Client requires a *FileNexus Administrator* to enable pick-list searching on an index in one or more document classes using the Data Capture Setup Program. For more information on how to set up indexes for pick-list searching, please refer to the section [FileNexus Data Capture Setup](#) program.

Searching with Pick-lists

To search for documents in the FileNexus Client using a pick-list, simply click on the drop down next to the index name and select from the displayed values. You can easily verify which index is set up for pick-list searching as the index edit box will be highlighted in yellow. Only the unique index values for documents already archived to FileNexus will be auto-populated in the index pick-list.



Enter any remaining search criteria as you would normally and click on the **Search** button to conduct your search for documents.

Multi-value Index Searches

Searching for documents by entering criteria for a multi-value index is very similar to entering search criteria for other indexes but there are certain points to keep in mind.

To enter search criteria for a multi-value index, simply select the comparison operator from the *Operator* drop down as normal, and then key in the value being searched for before hitting **Search**. With multi-value indexes, *each* of the possible multiple values for the document will be compared to the entered search criteria.

The screenshot shows the 'Advanced Search' dialog box with the following details:

Index Name	Operator	Search Value	Checkmark
Archive Date	Equals		<input type="checkbox"/>
Account Number	Equals		<input checked="" type="checkbox"/>
Customer Name	Equals		<input checked="" type="checkbox"/>
Account Type	Equals	RESP	<input checked="" type="checkbox"/>
Document Type	Equals		<input checked="" type="checkbox"/>
SIN	Equals		<input checked="" type="checkbox"/>

Buttons at the bottom: Clear, Options..., Classes..., Save Search, Search.

For example, if Customer Statements are archived to FileNexus and each statement can reference more than one Account Type, you may have an Index called “Account Type” set up as a multi-value index. In this example, the user wants to find documents that may relate to an “RESP” Account Type.

NOTE: An easy way to verify if an index is a multi-value index is to look at the icon to the left index name on the *Index Search* tab. If it looks like , then it is a multi-value index.

When viewing search results, you may see a comma separated list of values in the multi-value index column, as shown for the *Account Type* index in the search results below. Even though the user entered only “RESP” as search criteria for Account Type, the matching documents may have additional values in the Account Type multi-value index as indicated below.

	Account Number	Customer Name	Account Type	Document Type
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
	556677	John Smith	RESP	Direct Deposit Auth
	556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
	556677	John Smith	RESP, Terra Partners Portfolio	Direct Deposit Auth
	556677	John Smith	RESP, Terra Partners Portfolio	Credit Application
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Account Closure Notice

If all of the values for the multi-value index do not fit in the search results grid display, which will be indicated by “...”, you can hover over the desired grid cell and quickly see the entire comma separated list of values for the multi-value index as shown below.

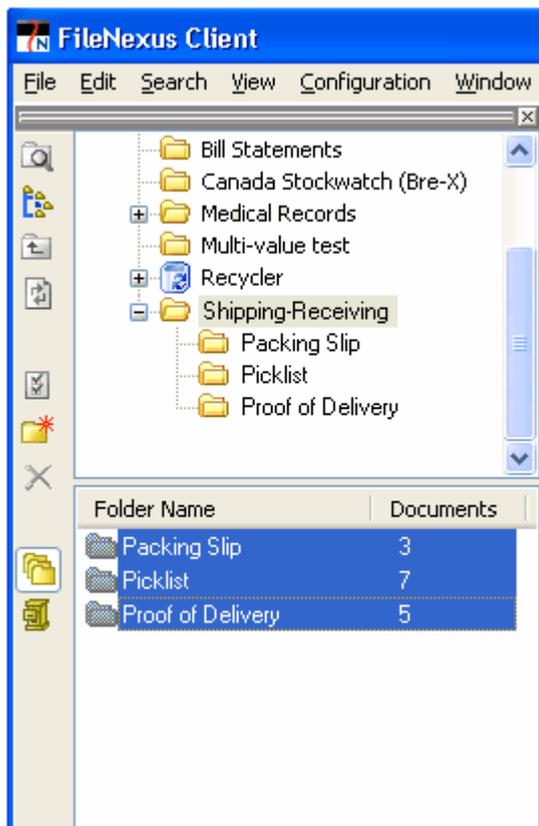
	Account Number	Customer Name	Account Type	Document Type
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
	556677	John Smith	RESP	Direct Deposit Auth
	556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
	556677	John Smith	RESP, Terra Partners Portfolio	Direct Deposit Auth
	556677	John Smith	RESP, Terra Partners Portfolio	Credit Application
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
	223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Account Closure Notice

Cross-Folder Searches

If you want to perform a search across more than one folder, make sure the Folder List window is displayed. You can display the folder list window by pressing the F12 key or by selecting *Folder List* from the *View* menu. The *Folder List* window will display all of the sub folders that exist in the currently highlighted folder. In this approach, you can only perform cross-folder searches on folders that have the same parent folder. (Filing Cabinet Searches can also allow for cross folder searching. This is described in the next section.)

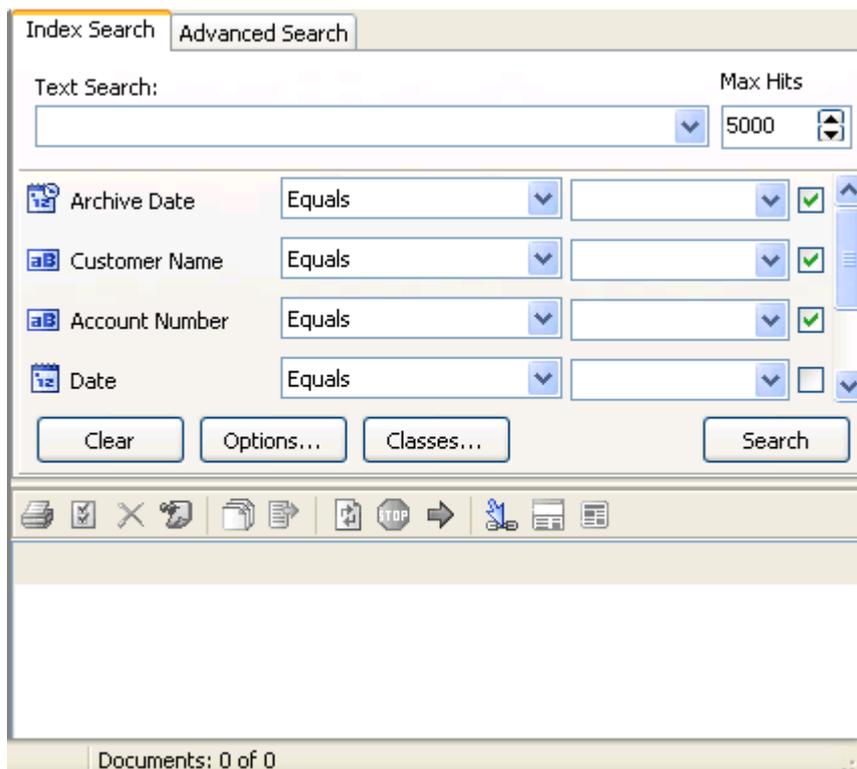
From the folder list window (usually in the bottom left hand corner of your screen), select the first folder that you want to search in, and then hold the Ctrl key down while you select other folders that you want to search across.

NOTE: The Search Pane will show only index values that are common to all of the document classes that you are searching across. Now you can proceed with your search as normal.

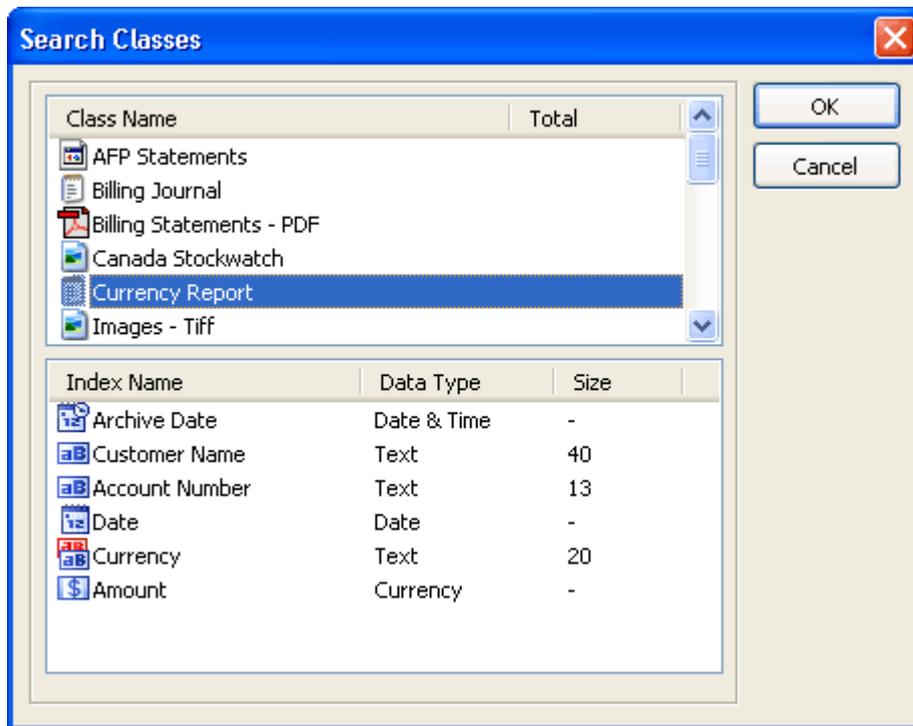


Document Class Specific Searches

If the folder that you are searching in contains more than one type of document class, then only common index will be shown in the Search Pane. For example, you have a document class called Resumes and that class has First Name, Last Name, and Document Date as its three indexes. You also have a document class called Employee File, which has First Name, Last Name and Social Insurance Number as its indexes. If you put both types of documents into one folder, then when you try to search on that folder, only the common indexes will appear (First Name and Last Name in this case). That means that you could not search on either the Social Insurance Number or the Document Date.



By clicking on the **Classes** button on the *Index Search* tab of the Search Pane, you can select which document class or classes you want to include in the search on the *Search Classes* dialog.



On the *Search Classes* dialog, select one or more Document Classes you wish to conduct your search on and hit **OK**. You will return to the *Index Search* tab of the Search Pane and can resume searching for documents as normal. In the above example, you can search the *Currency Report* documents in the currently selected folder(s) using any or all of the *Currency Report* indexes because it is the sole document class being included in the search.

NOTE: The next time you wish to conduct a document class specific search you will need to reselect the class using the **Classes** button as FileNexus will not save class information for subsequent searches.

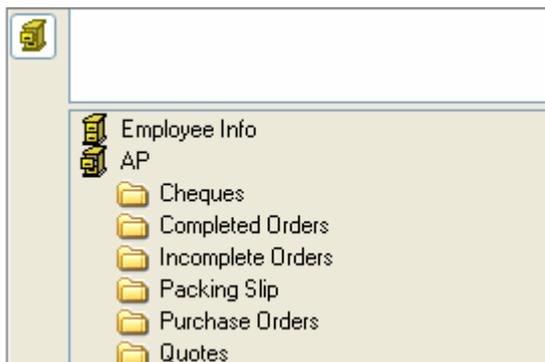
Filing Cabinet Searches

To perform a filing cabinet search, first make sure the *Cabinet List* window is displayed (or press **Ctrl+F12** to toggle the window on and off or click on the **Filing Cabinet** icon on the Folder Tree side toolbar). Next, you should right-click in the open space of the *Cabinet List* window and select *New File Cabinet*. A new cabinet icon will appear. You can rename the cabinet by right-clicking on it and selecting *Rename* from the pop-up window.

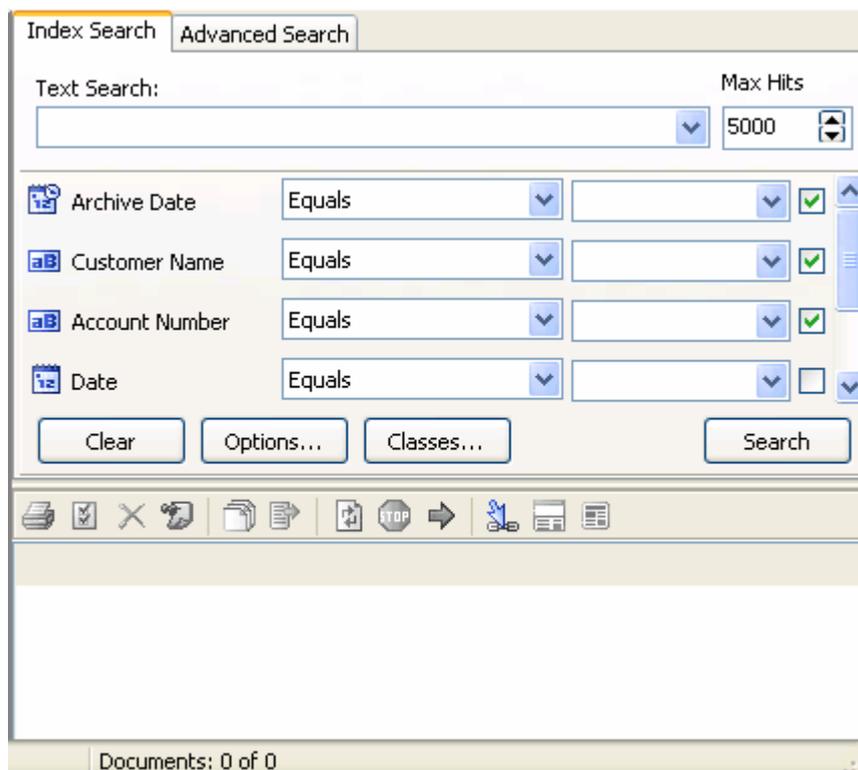
Adding Folders to a Filing Cabinet

To add a folder to the cabinet, drag the folder from the *Folders* window (press the **F11** key to toggle on/off the Folders window) into the newly created cabinet. Repeat this for each folder that you want included in the filing cabinet. Now, when you double-click or right-click on the **Cabinet** icon, you will be searching across all of the folders that you included in the cabinet. Filing cabinets are created on a per Windows login and per FileNexus User basis and will not affect other users on the FileNexus System.

NOTE: If the various folders (and the document classes within them) dragged into a filing cabinet do not have any common indexes, then the only search criteria that you will be able to search on and display will be the Archive Date.



Searching Full Text Indexed Documents



When searching in a folder that contains one or more document classes that have been full-text indexed, an extra *Text Search* input box will be displayed at the top of the Search Pane on the *Index Search* tab, along with a *Max Hits* input box. To perform a full-text search, simply key in the word or phrase in the *Text Search* input box that you want FileNexus to find. If you want only exact matches, enclose your search parameters in quotation marks.

Text Search

The string you enter in this edit box will be used to conduct a content search within full-text indexed archived documents. The document types that can be full-text indexed may include but are not limited to Text, Word docs, Excel spreadsheets, some PDFs, etc.

Max Hits

The *Max Hits* value is the total number of documents that will be returned and displayed in a *Search Results Grid* before a full-text search will terminate. *Max Hits* is not displayed for non full-text searches. This value has a default maximum of 5000 but is adjustable by your system administrator.

Examples:

Using Equals

John Smith - would find all documents that contain both the words John *and* Smith

"John Smith" - would find all documents that contain the phrase John Smith

John or Smith - would find all documents that contain either John *or* Smith

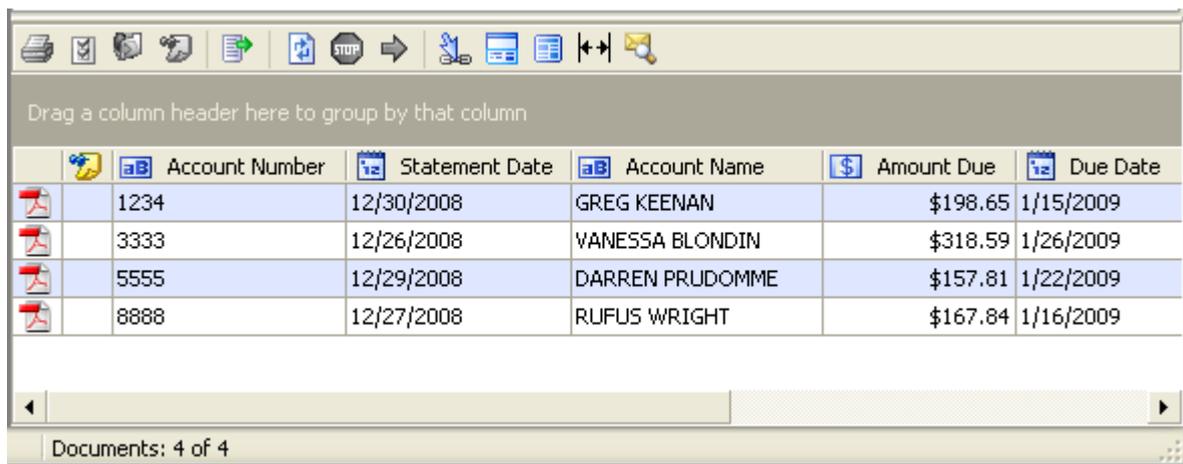
John - would find all documents that contain the word John

After conducting any type of search, your results will appear in the *Search Results Grid*.

Search Results

Search Results

Once FileNexus has searched for documents matching your search criteria, the results will be displayed in the *Search Results Grid*; a pane that appears below the Search Pane in the FileNexus Client.

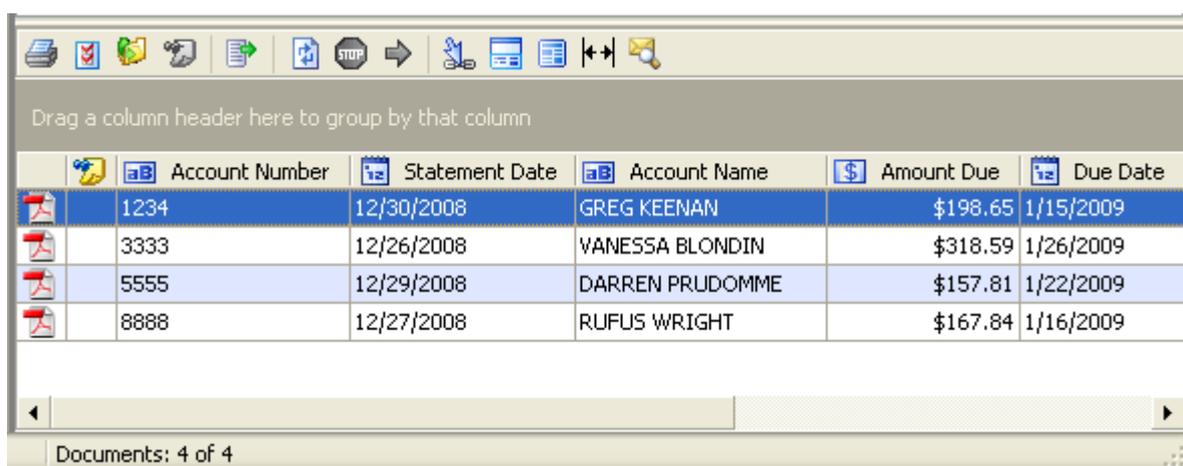


	Account Number	Statement Date	Account Name	Amount Due	Due Date
	1234	12/30/2008	GREG KEENAN	\$198.65	1/15/2009
	3333	12/26/2008	VANESSA BLONDIN	\$318.59	1/26/2009
	5555	12/29/2008	DARREN PRUDOMME	\$157.81	1/22/2009
	8888	12/27/2008	RUFUS WRIGHT	\$167.84	1/16/2009

Documents: 4 of 4

If no matching documents are found, the search results grid will appear empty. If one or more documents match your search criteria, one row for every document will be displayed, along with the documents' associated index values.

To view a document, highlight and double-click it in the search results grid. To sort the result list, click on the index column that you want the grid sorted by. In the example below, if you clicked on the Account Name column, the result list would be sorted by Account Name.



	Account Number	Statement Date	Account Name	Amount Due	Due Date
	1234	12/30/2008	GREG KEENAN	\$198.65	1/15/2009
	3333	12/26/2008	VANESSA BLONDIN	\$318.59	1/26/2009
	5555	12/29/2008	DARREN PRUDOMME	\$157.81	1/22/2009
	8888	12/27/2008	RUFUS WRIGHT	\$167.84	1/16/2009

Documents: 4 of 4

NOTE: Only Indexes that were selected (checked) in the search pane will be displayed in the search results grid.

For a more detailed explanation of the *Search Results Grid* and how to work with search results, refer to the next section on the *Search Results Window*.

Overview

The *Search Results Window* will appear after FileNexus has completed a user's document search. It has two main components, the *Search Results Grid* and the *Search Results Toolbar*. For a better view of the search results, you may press F11 to toggle on/off the *Folder Tree* view that normally appears on the left-hand side of the application window.

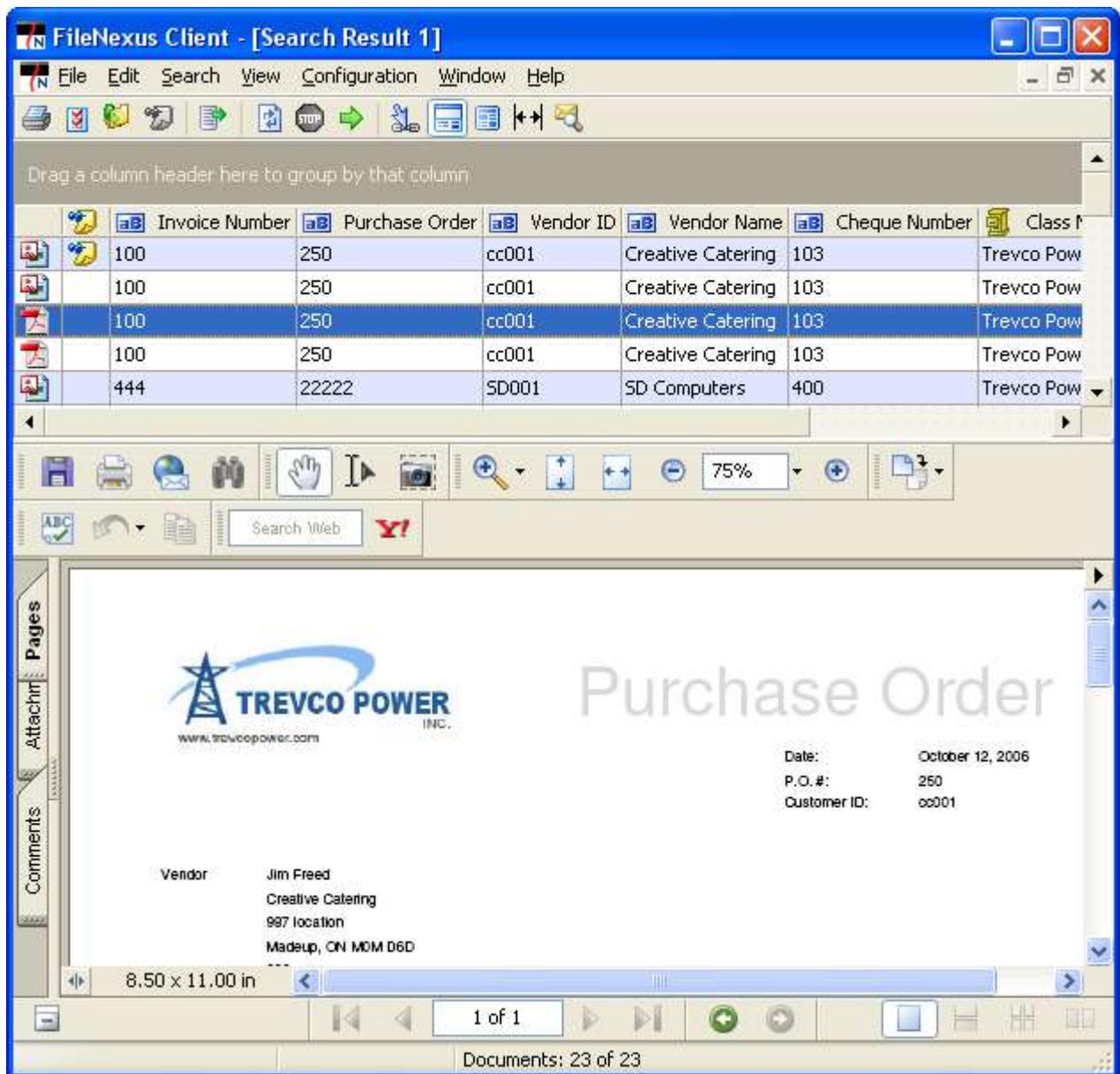
The *Search Results Grid* displays a list of archived documents that met the user's search criteria. If FileNexus does not find any matching documents, the window will be empty.

If you have matching document results in the grid, they may appear as shown in the below example with one row per document. In the case of having a multi-value index on the documents being searched, the values for the multi-value index may appear in a comma separated list as shown in the *Account Type* column.

Client Number	Customer Name	Account Type	Document Type
223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement
556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
556677	John Smith	RESP	Direct Deposit Auth
556677	John Smith	RESP, Terra Partners Portfolio	Monthly Statement
556677	John Smith	RESP, Terra Partners Portfolio	Direct Deposit Auth
556677	John Smith	RESP, Terra Partners Portfolio	Credit Application
223344	Jane Doe	RESP, RSP Line of Credit, Smith Par...	Monthly Statement

Since the *Search Results Grid* is dynamic, you can manipulate your results for ease of viewing. For more information on how to employ the features of the dynamic *Search Results Grid*, refer to the section on [A Dynamic Search Results Grid](#).

In the below example, the user has highlighted a document and it is displayed in the *Preview Pane* below. The *Preview Pane* allows a user to view document contents without having to open the document. The *Preview Pane* can be toggled on/off by clicking the *Preview Pane* icon  on the *Search Results Toolbar*.



A description of how to manage documents in the Search Results Grid can be found in the [Search Results Toolbar](#) section.

A Dynamic Search Results Grid

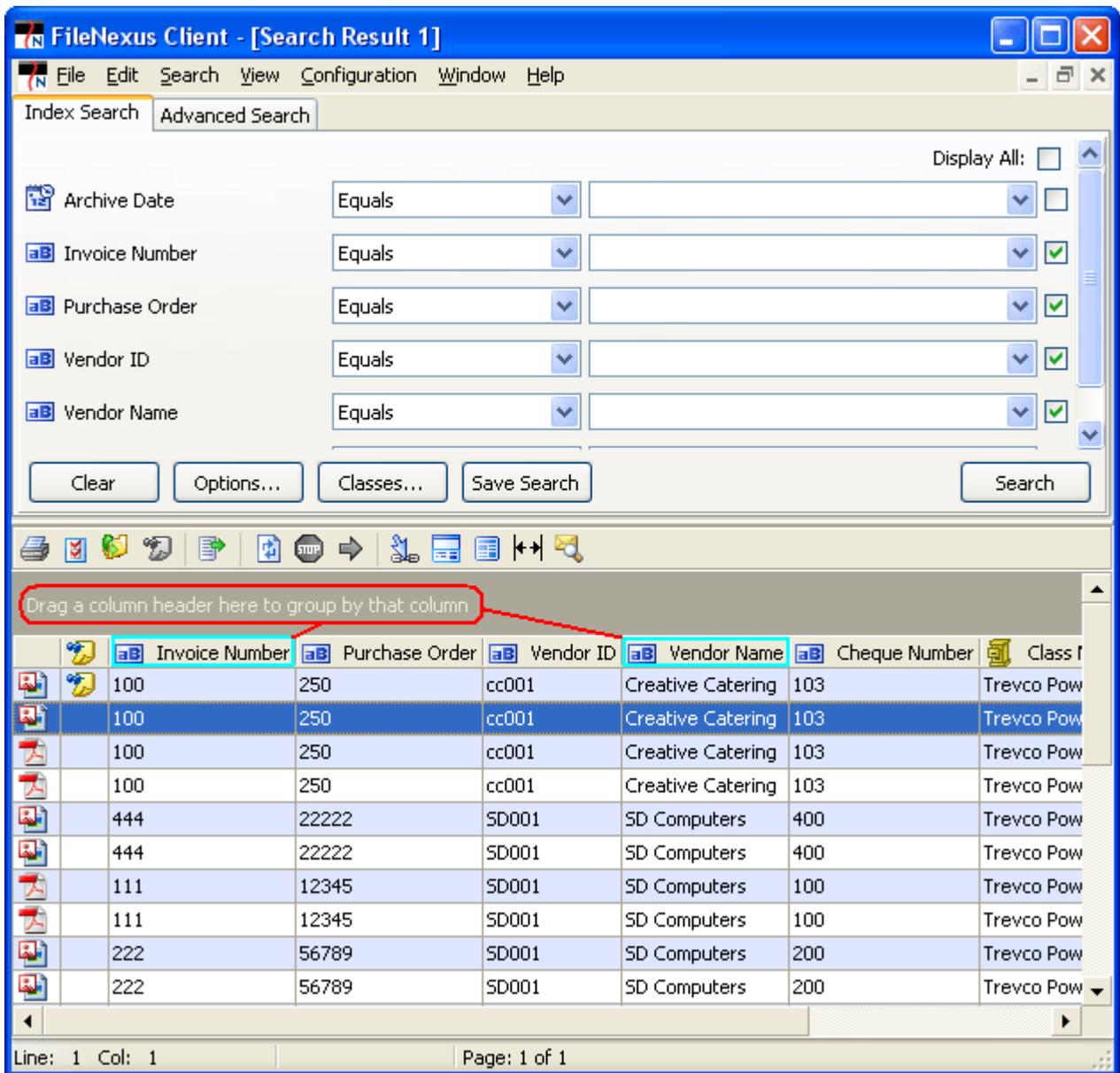
The *Search Results Grid* is dynamic and therefore allows individual FileNexus users to manipulate the view of search results without affecting other users and without permanently changing their own experience from one document search to another.

Reordering Index Columns

To change the order of index columns in the *Search Results Grid*, simply drag and drop the column headings to the desired location. This change will only stay in effect for the current search results. The next search will result in the column headings reflecting the same order of indexes displayed in the *Index Search Pane*. To change the order of indexes in the *Index Search Pane* (and thereby change the order of columns in the *Search Results*), refer to the *Lock Search Indexes* feature in the [Index Search Tab](#) section.

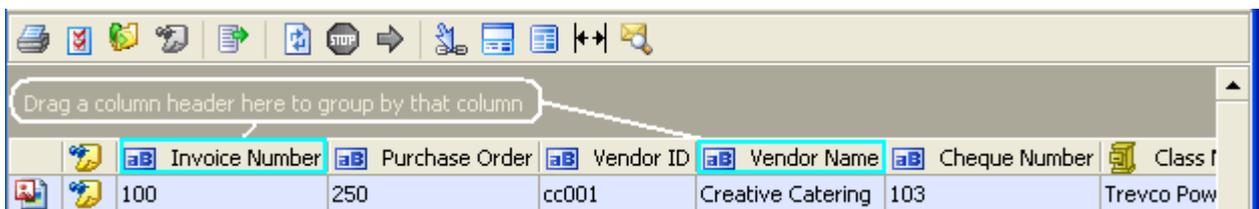
Sorting by Columns

To sort your search results by a particular index, simply click on the column heading containing the index name. The first click on the column heading will sort the search results in *ascending* order. Click the column heading again to order your search results in *descending* order.

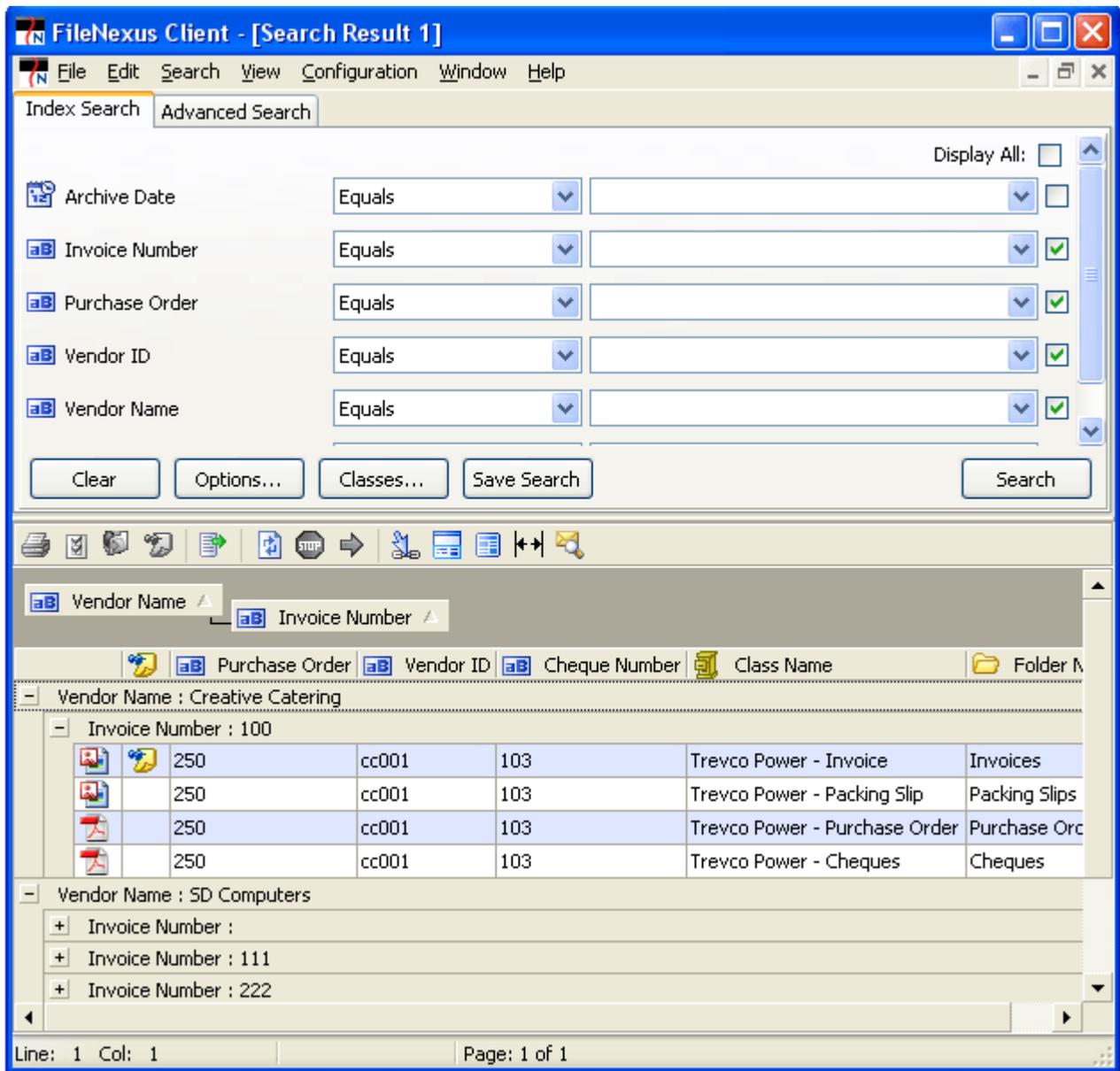


Grouping by Index Columns

In the dynamic *Search Results Grid*, you can also use the “Group By” feature to better organize your search results. Simply click and drag the column heading of the index you wish to group your results by into the grey space just below the *Search Results Toolbar*. You can group by more than one index by dragging additional column headings into the grey space.



Your results may then appear as shown in the below example where the user has grouped by the *Vendor Name* and *Invoice Number* indexes. To expand your grouped results click on the “+” signs next to the index name.



The Search Results Toolbar

The Search Results (or Client) Toolbar

The *Search Results Toolbar* is located at the top of the results window and it should look similar to the one below.



Below is a list of all the icons and their functionality.

Printing

The Printer icon allows you to print documents in the current *Search Results Grid*. Highlight the document(s) you wish to print and click on the printer icon. A print dialog will appear where you can choose the normal print options like the print range, number of copies, etc. For more information on printing in FileNexus, see the [Printing a Document](#) section of this manual.

Document Properties

The Document Properties icon allows you to view all of the index values of an archived document in the *Document Properties* dialog box. This dialog box also allows users that have the appropriate access rights in FileNexus to manually edit the index value(s) of a document. To change the value of a document's index, highlight the document in the *Search Results Grid* and click on the **Properties** icon (or right-click the document and select *Properties* from the pop-up menu). Then, on the *Document Information* tab, click in the text box next to the index needing to be modified, and enter in the correct value before hitting **OK**.



From the *Document Properties* dialog, a user can also check the *Audit Log* by selecting the *Audit Log* tab to view a complete account of who has handled or viewed the document from time of archival.

Document Information		Audit Log	
Audit Date	User	Action	
10/26/2005 10:08:25 AM	SA	Modified Index	
10/26/2005 10:08:16 AM	SA	Modified Index	
10/17/2005 11:32:05 AM	SA	Downloaded Document	
10/17/2005 11:31:15 AM	SA	Downloaded Document	
8/31/2005 10:46:39 AM	SA	Downloaded Document	
8/29/2005 11:16:05 AM	HR Manager	Moved Document	
8/29/2005 11:15:45 AM	HR Manager	Downloaded Document	
8/16/2005 4:44:12 PM	SA	Downloaded Document	
8/16/2005 11:47:00 AM	HR Manager	Modified Index	
8/16/2005 11:46:56 AM	HR Manager	Downloaded Document	
8/14/2005 5:43:48 PM	HR Manager	Moved Document	
8/12/2005 4:31:16 PM	SA	Archived Document	

More Information

The index "Employee Status" was modified from :

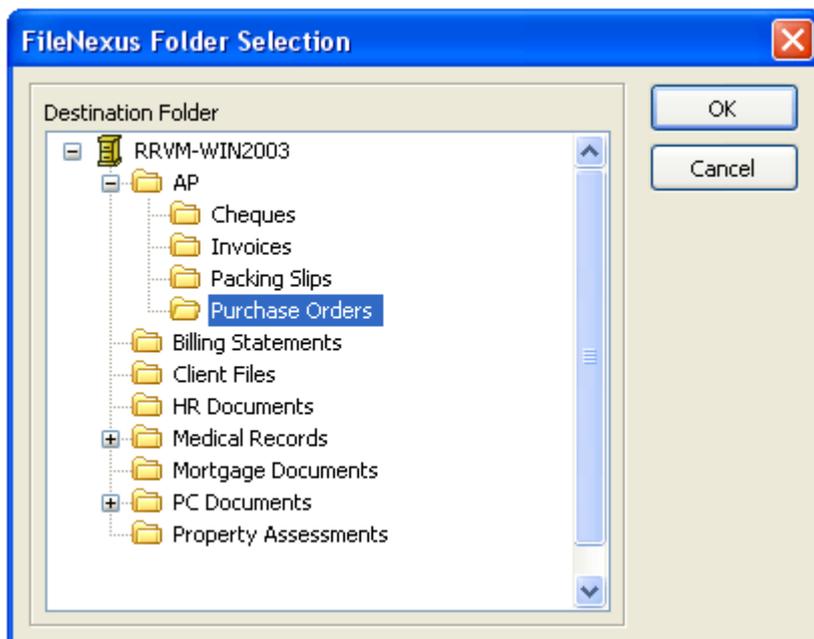
In the above example, you can see the date time for each time the document has been viewed (Downloaded) and by whom, if it has been moved to/from a different folder, whether any index values were modified, etc. By highlighting an individual entry, additional information about the entry may appear in the *More Information* pane.

NOTE: The audit log of an archived document is maintained automatically by FileNexus and cannot be manually amended in any way. Furthermore, it is viewable only by FileNexus users with the appropriate security rights.

Move To

The *Move To* icon allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the *Search Results Grid* that you wish to move, and click the **Move To** icon.

The *FileNexus Folder Selection* window will appear and allow you to select the correct destination folder in the FileNexus Client before you hit **OK**. Hit **Cancel** to cancel the move operation.



Document Notes

If any annotation or document notes have been added to the document currently highlighted, the Notes icon will be enabled (appear in colour rather than grayed out) on the Search Results Toolbar and the same Note icon will appear next to the document's index values in the *Search Results Grid*. Clicking on it will allow you to read the attached note(s) without having to open the document itself. This icon will only become enabled if you have a single document selected. To find out how to add notes to a document, refer to [Adding Document Notes](#).

Export List

The **Export List** icon allows a user to export either the selected document(s) or the entire *Search Results Grid* to a windows folder. An *Export List As ...* window will appear allowing a user to specify the type of export.



If you wish to export documents in their native file format (e.g. Word .doc, .xls, .txt, .tif, etc.) then select the *Export Documents* radio button and hit **OK**. If you wish to export only the index values in the selected document(s), select *Export Comma Delimited List* and hit **OK**. This will create a .csv file, or comma separated list of index values for the selected document(s). To export FileNexus document links to a Windows folder, select *Export Document Links* and hit **OK**.

IMPORTANT: Be sure to check off *Selected* before you hit **OK** unless you want to export the entire *Search Results Grid*. Note: Text documents will be not be exported with associated form overlays

Regardless of the option you choose in the *Export List As* window, a dialog box will appear allowing you to select where to save the document, document link, or .csv file to, whether it's to your desktop, or some other network folder.

Refresh Search Results

Clicking the Refresh button will instruct FileNexus to perform your last search again. This is useful if you have been working with a group of documents in a folder and want to see if additional documents have been archived to the same folder. By clicking the refresh button, the *Search Results Grid* will refresh to show you all of the currently archived documents that meet your previous search criteria.

Stop (download of search results)

If you have started a search that will result in a large number of documents being returned, and you don't want to wait while FileNexus downloads all of the results, click on the Stop icon to prevent any further results from being added to your Search Results Grid.

Hit Highlighting

If your search included a Full-Text search and the *Preview Pane* window is displayed, you'll notice that FileNexus automatically finds the word/phrase that you searched for, and displays the page that it was found on and highlights the word. By clicking on the "Next Hit" icon (found on the Search results toolbar) FileNexus will automatically move to the next found instance of the word/phrase within a document.

NOTE: Hit highlighting currently works with Text, Laser Capture, Microsoft Word, Excel, and PDF documents.

Hit Highlighting and Full text searches containing more than one word

When you use the Full-Text search option to search for more than 1 word, FileNexus automatically inserts a logical "And" operator between each word. This means that a Full-Text search for John Smith is really a search for documents that contain both John and Smith. The hit highlighting function will highlight instances of either word. For example, the hit highlighting function may highlight the word John even if the last name was Doe instead of Smith. If you want your search and the hit highlights to be phrase specific, then you must enclose the original search parameters in quotation marks. Then, when you search for "John Smith" the Full-Text search will only return documents that contain the exact phrase, and similarly the hit highlighting function will display only instances of that phrase.

FileNexus Document Links

If you have the FileNexus Documents links icon depressed, you can drag a document link out of FileNexus to your Windows desktop, to an email message, or other Windows based applications. The FileNexus Document Link (FDL) is an encrypted pointer. When a user clicks on this pointer, the FileNexus Client will be invoked and the document opened for quick viewing, without having to perform a document search. Document links have several uses.

1. You can use documents links when you want to e-mail a document to someone in your organization who has access to FileNexus. Since the document link is only a pointer file it is very small and takes up very few network resources. This is much more efficient than mailing the actual document.
2. Another use for document links is to give someone access to a document that is in a folder to which they do not normally have viewing rights. Since the document link has the necessary security rights to view the document built into it, this is a good way to provide users occasional access to sensitive documents. For example, Bob does not have access to the payroll folder, but I want him to look at last Tuesday's payroll report. I can e-mail him a document link. Now Bob can see the Tuesday payroll report, but he cannot view or search for any other documents in the same FileNexus folder.
3. Another use for document links is to help integrate FileNexus with your existing work flow solution. In this example, you might want to export all new invoices to a set of document links. These links would then be put through your existing work flow. Each time someone clicks on a link, the original FileNexus document will appear on his/her screen.

Preview Pane

If the Preview Pane icon is depressed, an additional window appears underneath the Search Results Grid. This pane will display to the user a preview of the currently selected document (it will show some portion of the first page of the selected document). If you want to work with or view the entire document, simply double-click the document in the Search Results Grid as you normally would. The preview pane mode can be toggled on or off simply by clicking on the Preview Pane icon. For more information on how to manage documents within the Preview Pane window, see the section entitled [Preview Pane](#).

Forms Overlay

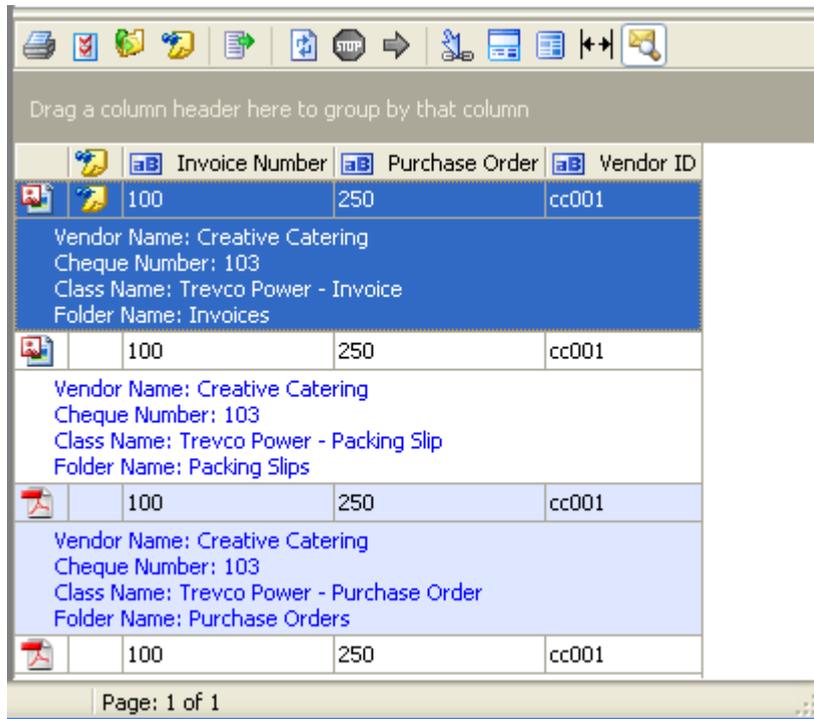
If the Forms Overlay button is depressed, any text document that is set up to use an image overlay will automatically have the appropriate form artwork superimposed on it. If no form or image overlay is available for the document, it will appear as normal.

Auto-size Columns

If you click on the Auto-size Columns icon, any search results columns in the grid below will be adjusted to fit either the max size of the index values or the column heading (index name), whichever is greater.

Auto-Preview

By clicking on the Auto-Preview icon, the user is able to wrap around the rows in the Search Results Grid should they extend past the end of the FileNexus Client's application screen (and therefore require the user to scroll across to view the remaining index columns).



In the case that a multi-value index is included on the document(s) being searched for, the values for the multi-value index may be displayed in a comma separated list as shown below.

