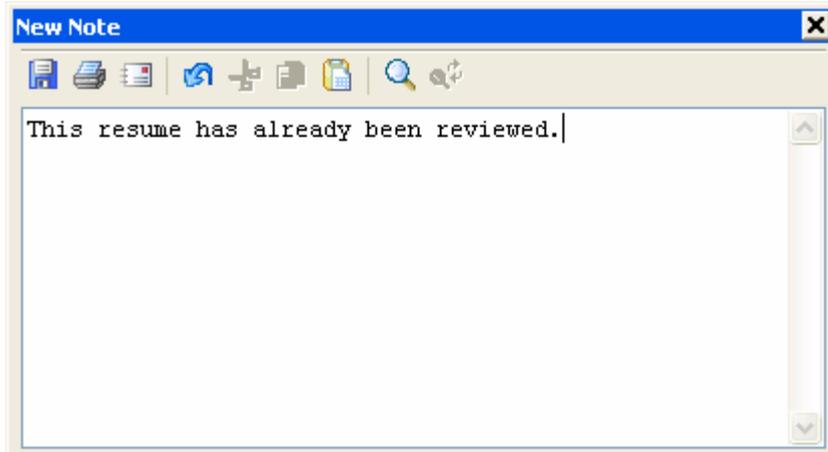
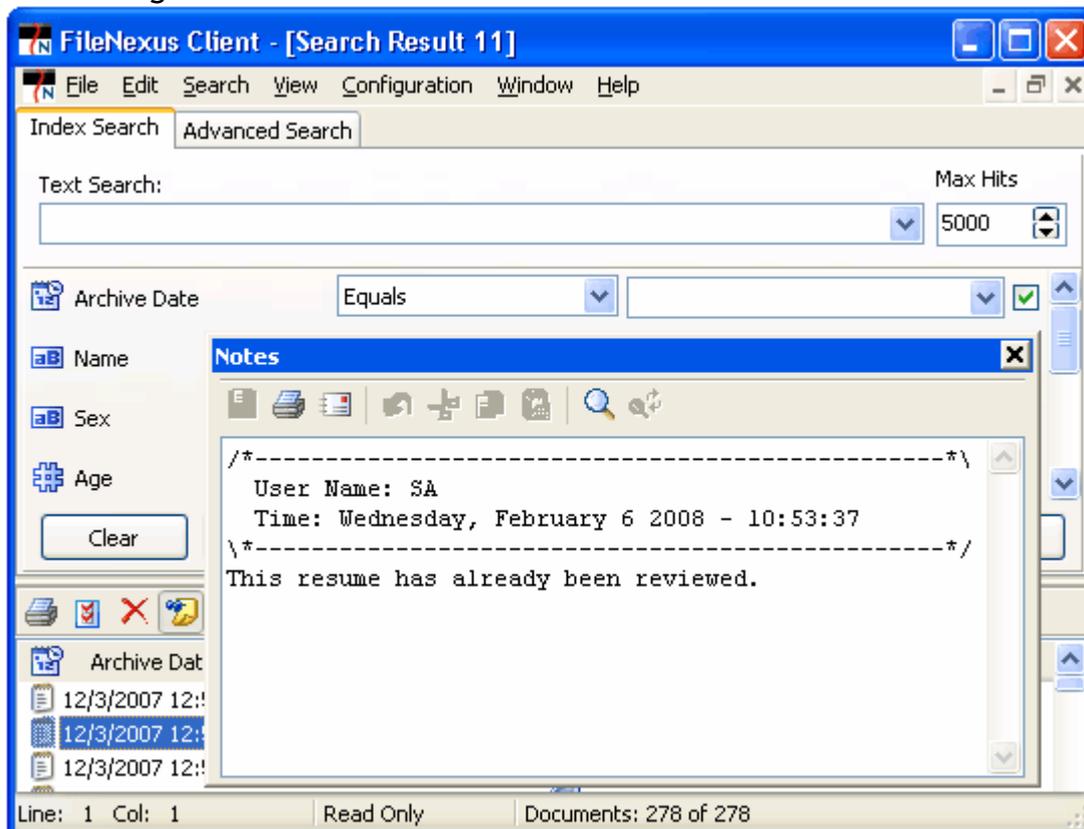


## Adding Document Notes

To add a note to a document, right-click on the document in the *Search Results Grid* and select *Annotate*. The *New Note* window will appear for you to enter the text of the note, save, print, or email the note.



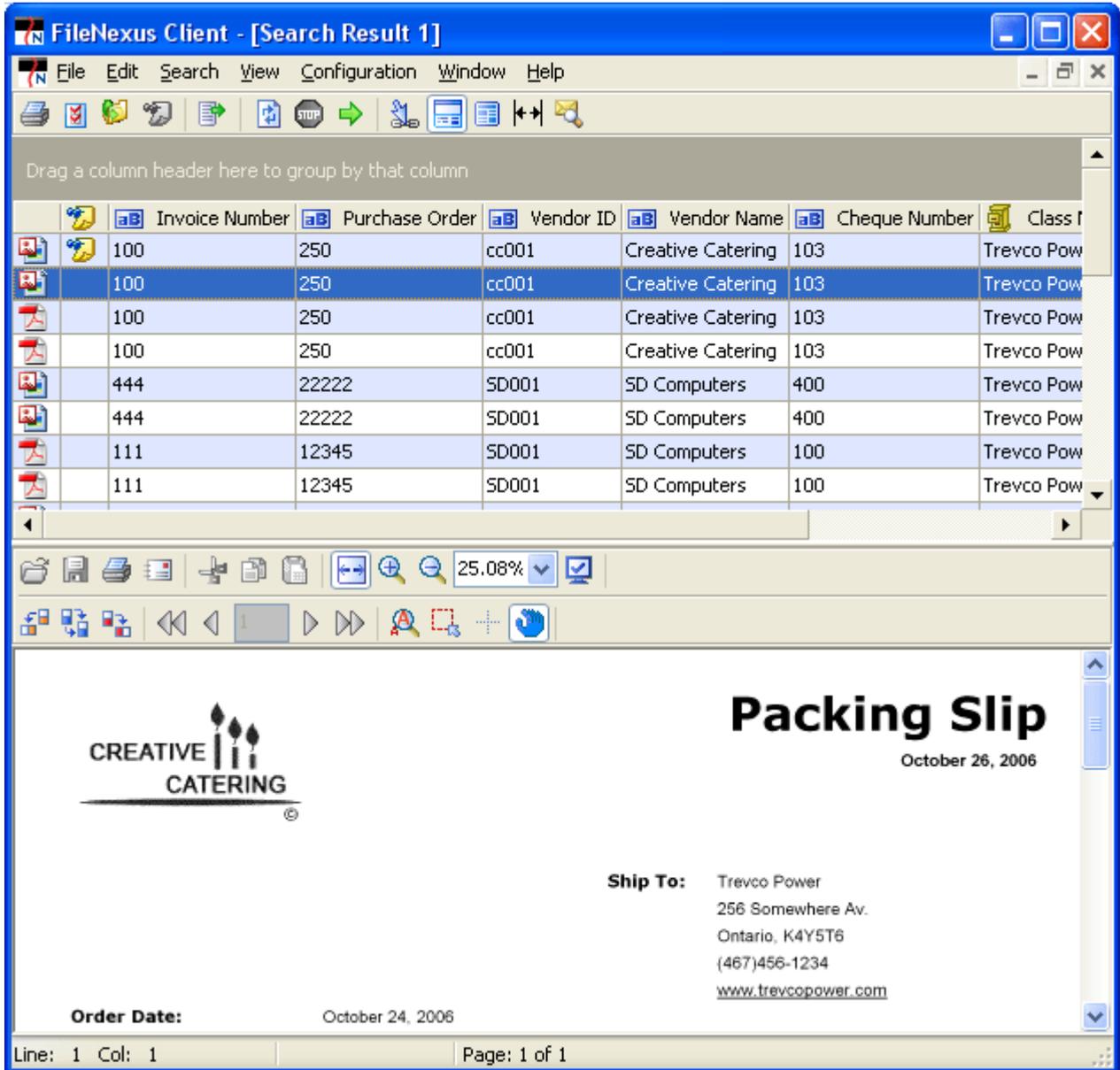
To save the note, click on the save icon in the top left corner of the *New Note* window, or click on the close window icon (the x in the top right of the window) and select **Yes** in the confirmation window that appears. If any document notes have been added to a document, the *Notes* icon will be enabled (appear in colour rather than grayed - see picture below). 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.



Notes added to the document will be logged with the user name and date time of entry.

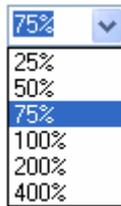
## Overview

The *Preview Pane* of the FileNexus Client allows you to quickly preview numerous documents in the *Search Results Grid* without having to open up each document. By highlighting a document in the *Search Results Grid*, a preview of the document will appear in the lower pane so that you can make a quick visual verification that the document indexes coincide with what is contained in the document.



When viewing documents in the *Preview Pane*, a *Preview Pane Toolbar* is available to you to manage the document currently displayed.



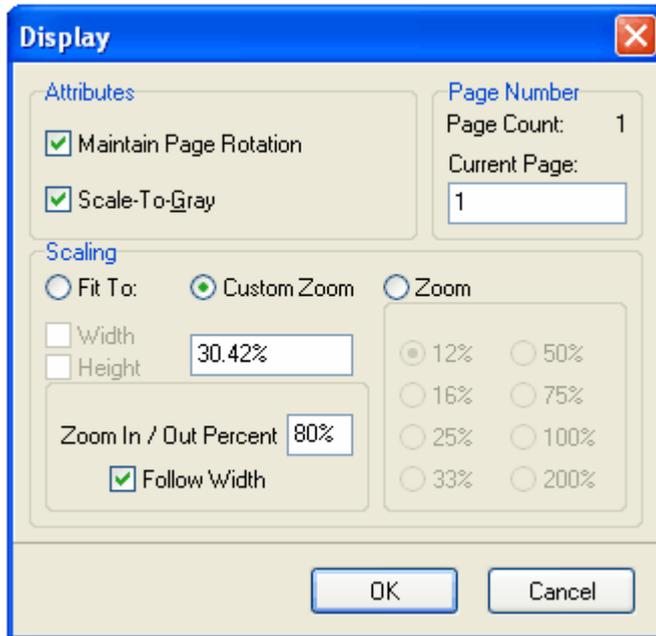


### Scale select

The scale selection drop down allows you to select in which percentage scale you wish to view the current document.

### Display Settings

The display settings icon will pop up a *Display Properties* window and allow you to adjust various display properties for documents.



### Rotate 270

The rotate 270 icon will actually rotate the current document counter-clockwise by 90 degrees.

### Rotate 180

The rotate 180 icon will rotate the current document by 180 degrees.

### Rotate 90

The rotate 90 icon will rotate the current document clockwise by 90 degrees.

### First Page

If the current document has more than one page, you can navigate to the first page by selecting the first page icon.

### Previous Page

If the current document has more than one page, you can navigate to the previous page by selecting the previous page icon.

### Next Page

If the current document has more than one page, you can navigate to the next page by selecting the next page icon.

## Last Page

If the current document has more than one page, you can navigate to the last page by selecting the last page icon.

## Magnify

By clicking on the magnify icon, you can then hold the left-click button of your mouse down as you drag it around the current document to act as a portable magnifying glass.

## Zoom

By clicking on the zoom icon, you can left-click and drag your mouse to draw a box around a particular area of the current document to zoom in on.

## Select

To use the selection tool, click on the select icon and then click and drag your cursor on the displayed document to draw a box around the area you wish to select. You must select an area of the displayed document before using the cut or copy tools.

## Document Properties

### Overview

The *Document Properties* window describes the characteristics of a particular document located in the *Search Results Grid* of the FileNexus Client application. It lists the current index values of a document on the *Document Information* tab, as well as the audit log of the document on the *Audit Log* tab.

You can open up the *Document Properties* highlighting a document in the *Search Results Grid* and selecting *Properties* or clicking on the **Document Properties** icon in the *Search Results Toolbar*. 



As mentioned, there are two tabs in the Document Properties window.

### [Document Information Tab](#)

### [Audit Log Tab](#)

## Document Information Tab

In the *Document Information* tab, you can view the current index values associated with a document. By clicking on the **Next** or **Back** buttons, you can scroll through the document information for the next or previous document within the same *Search Results Grid*.



If an incorrect value has been entered by data entry personnel or populated from a host look up, you may correct the index value based on the actual information contained in the document. To change the value of an index, simply click within the white space next to the index name, and enter the correct information. If the index value is a date, you can double click the white space to use a calendar utility to select the appropriate date.

**NOTE:** A user must have the appropriate rights to edit index values of a document.

Customer Name: KAREN JONES

Account Number: 54434

Date: 4/14/2007

Currency: \$

Amount: \$

May, 2007						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

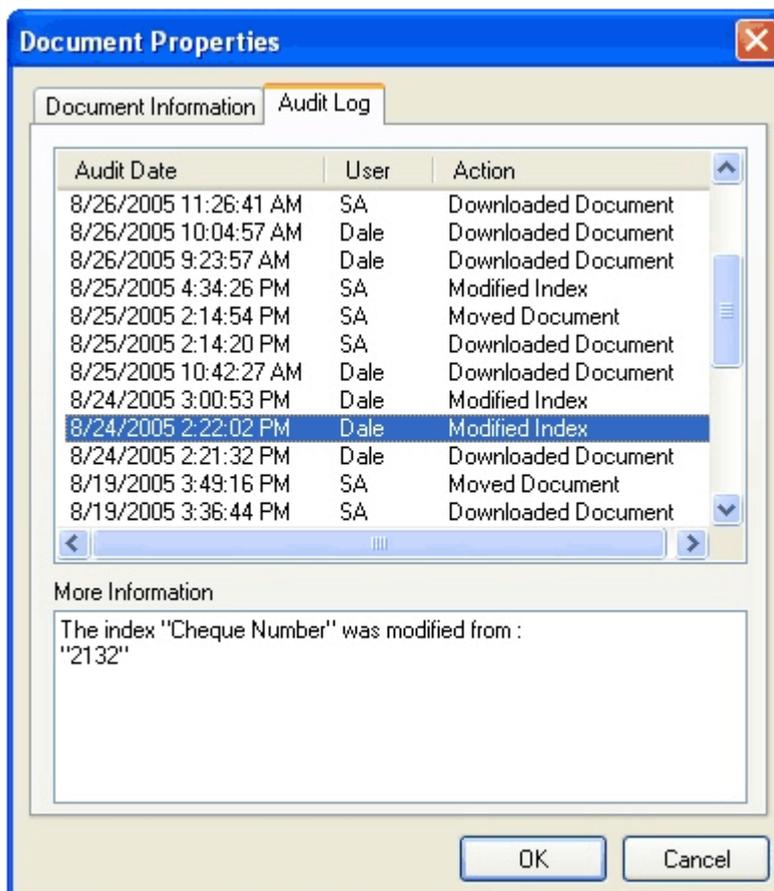
Cancel

## Audit Log Tab

### Audit Log Tab

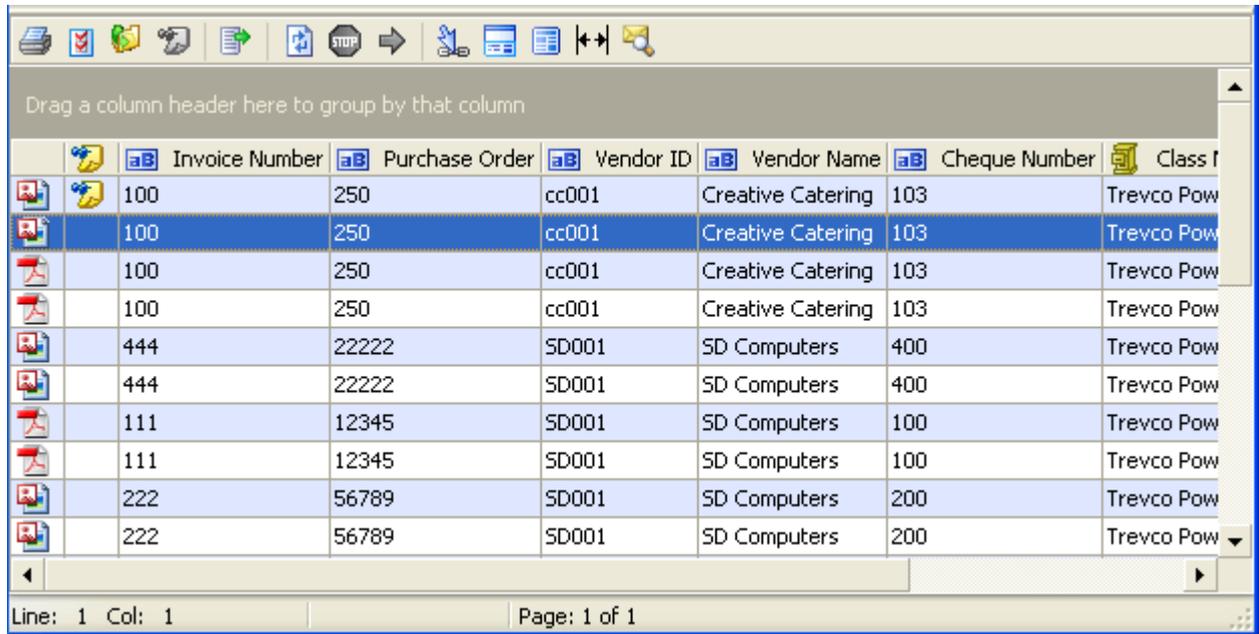
The *Audit Log* is a secure and complete account of everything that has occurred to a document from the time it enters the FileNexus system. The *Audit Log* tab allows you to view exactly who has accessed a document and what has been done to it. FileNexus automatically logs each instance a document has been viewed, had notes added/removed, emailed, downloaded, moved between folders, or managed in any way, as well as stamps the date time and user id that carried out the event.

By highlighting an entry in the top pane of the *Audit Log* tab, any available additional information about the event will be displayed in the *More Information* pane.



## Opening a Found Document

Once FileNexus has performed a search and found all of the documents that met your search criteria, the results will be displayed in a *Search Results Grid*. To view a document in its entirety, double-click on it in the *Search Results Grid* or right-click on it and select **Open** from the pop-up menu.



Drag a column header here to group by that column

	Invoice Number	Purchase Order	Vendor ID	Vendor Name	Cheque Number	Class
	100	250	cc001	Creative Catering	103	Trevco Pow
	100	250	cc001	Creative Catering	103	Trevco Pow
	100	250	cc001	Creative Catering	103	Trevco Pow
	100	250	cc001	Creative Catering	103	Trevco Pow
	444	22222	SD001	SD Computers	400	Trevco Pow
	444	22222	SD001	SD Computers	400	Trevco Pow
	111	12345	SD001	SD Computers	100	Trevco Pow
	111	12345	SD001	SD Computers	100	Trevco Pow
	222	56789	SD001	SD Computers	200	Trevco Pow
	222	56789	SD001	SD Computers	200	Trevco Pow

Line: 1 Col: 1 Page: 1 of 1

The *Search Results Grid* will display the values for all of the indexes that were selected in the *Search Pane*. Sometimes the information displayed in the *Search Results Grid* is all that you require.

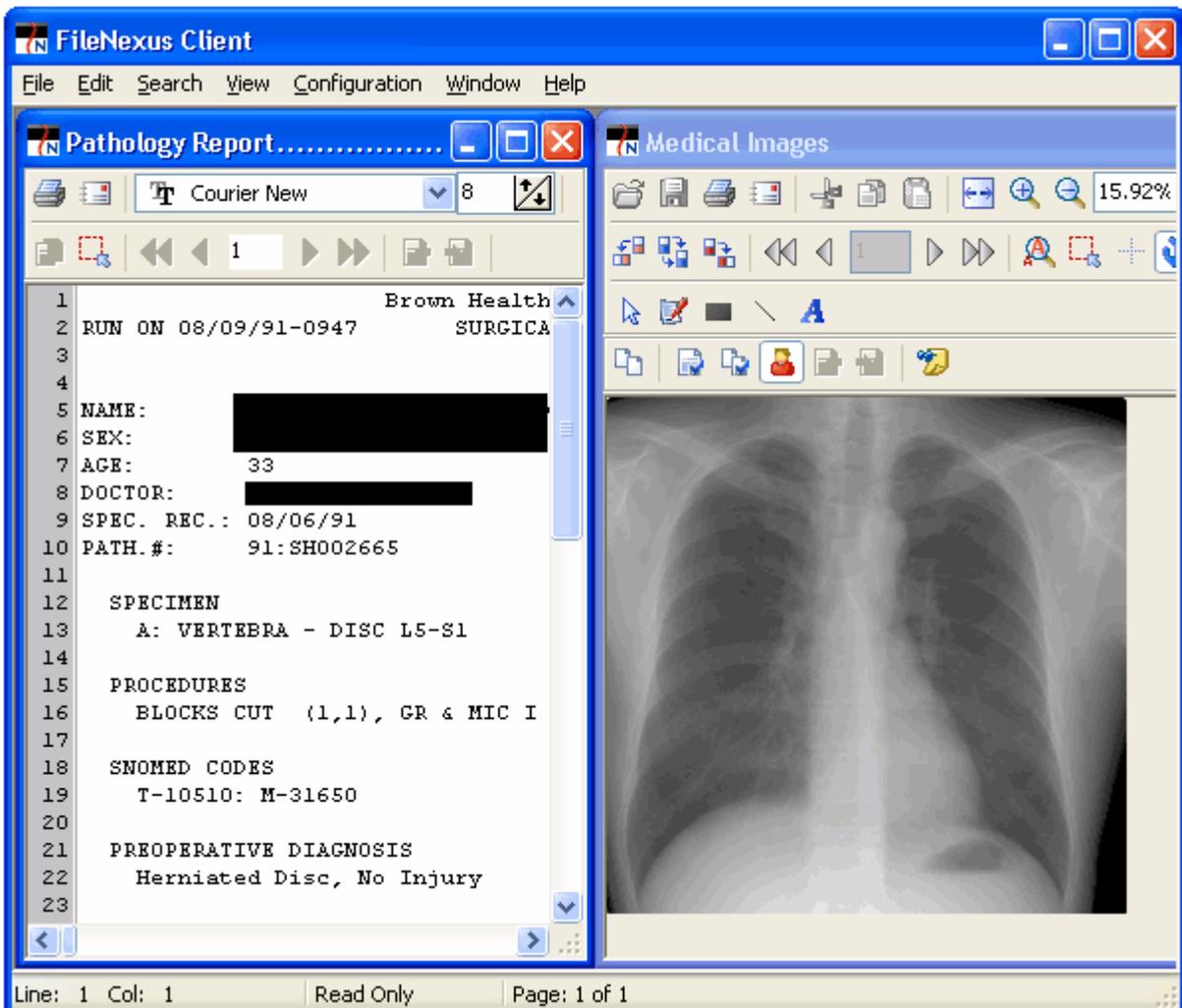
For information on how to manage documents that you open, refer to the following section on *Viewing Documents*.

## Overview

Viewing documents within FileNexus can allow users to manage daily document handling, retrieval, and work flow processes. In contrast to viewing documents in the *Preview Pane*, double-clicking on a document in the *Search Results Grid* will allow a user greater flexibility and added functionality in document management.

The FileNexus Client supports document viewing of text files, Jpeg and Tiff images, as well as other Windows supported file types.

**IMPORTANT:** For file types that are not able to be viewed within FileNexus, double-clicking on the document from the *Search Results Grid* will invoke the native file's default application. For example, if you double-click on an archived Word document, it will open up in an instance of the Microsoft Word application. All Windows file types can be archived to FileNexus, but they remain in their native file format, NOT in a FileNexus proprietary format, and therefore can still be viewed in their originating applications.



[Image Viewing](#)

[Text Viewing](#)

## Manipulating Retrieved Documents

FileNexus supports the archival and viewing of various image formats; Tiff, Jpeg, Gif, etc. Opening an Image document from the *Search Results Grid* will result in differing document management options than opening up a Text or other type of document.

### Image document toolbar



#### Printing

The Printer icon allows you to print the current document in the *Preview Pane*. 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.

#### Send or Emailing a Document

The Send icon allows you to email the active document in the *Preview Pane*. By clicking on the send icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the document as an attachment in its native file format (tiff, .doc, .xls, .txt, etc.).

#### Cut

The Cut icon can be used to temporarily remove a selected area of the document. To select a portion of the document, see *Select* described at the end of this article. Using this option will not permanently delete a portion of the archived document from FileNexus. It will simply remove the selected area temporarily until the user selects another document for viewing.

#### Copy

The Copy icon can be used after you have selected an area of the document to copy to your clipboard. To select a portion of the document, refer to the *Select* icon described later in this document. After you click on the copy icon, you can then paste the copied area of the document to another Windows application (e.g. Word, Paint, Photoshop, etc.).

#### Follow width

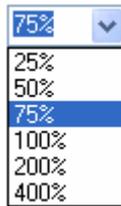
If you have zoomed in or out of the current document in the *Preview Pane*, you can resize the document to fit the width of the screen by clicking on the *Follow width* icon.

#### Zoom in

The Zoom in icon allows you to resize the current document to a larger scale for easier viewing.

#### Zoom out

The Zoom out icon allows you to resize the current document to a smaller scale for easier viewing.

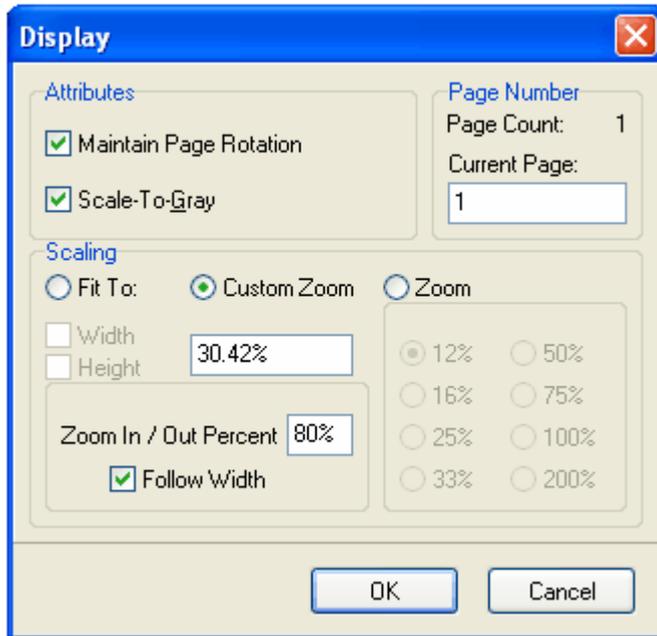


### Scale select

The Scale Selection drop down allows you to select in which percentage scale you wish to view the current document.

### Display Settings

The Display Settings icon will pop up a *Display Properties* window and allow you to adjust various display properties for documents.



### Rotate 270

The Rotate 270 icon will actually rotate the current document counter-clockwise by 90 degrees.

### Rotate 180

The Rotate 180 icon will rotate the current document by 180 degrees.

### Rotate 90

The Rotate 90 icon will rotate the current document clockwise by 90 degrees.

### First Page

If the current document has more than one page, you can navigate to the first page by selecting the First Page icon.

### Previous Page

If the current document has more than one page, you can navigate to the previous page by selecting the Previous Page icon.

### Next Page

If the current document has more than one page, you can navigate to the next page by selecting the Next Page icon.

## Last Page

If the current document has more than one page, you can navigate to the last page by selecting the Last Page icon.

## Magnify

By clicking on the Magnify icon, you can then hold the left-click button of your mouse down as you drag it around the current document to act as a portable magnifying glass.

## Zoom

By clicking on the Zoom icon, you can left-click and drag your mouse to draw a box around a particular area of the current document to zoom in on.

## Select

To use the selection tool, click on the Select icon and then click and drag your cursor on the displayed document to draw a box around the area you wish to select. You must select an area of the displayed document before using the cut or copy tools.

## Pan mode

Click on the Pan mode icon when you want to be able to shift (or pan) the image. When you are in pan mode, hold down the left mouse button and drag your mouse in the same direction that you want the image to move.

## Select Markup

The Select Markup icon allows you to select markups that already exist on an image document (Tiff, jpeg, gif) and move or delete them. Click on the Select Markup icon, then click on the existing markup on the document, and hit Delete or drag the markup to another location on the page. Once you have modified the archived document, you will be prompted to save your changes when closing the current document view.

## Highlighter Markup

If you click on the Highlighter Markup icon, you can highlight areas of the current document by left-clicking and dragging your mouse to select a zone. If you wish to change the highlighting colour, right-click on the highlighted area and select Properties. A window will appear allowing you to modify the colour.

## Blackout Markup (Filled Rectangle Markup)

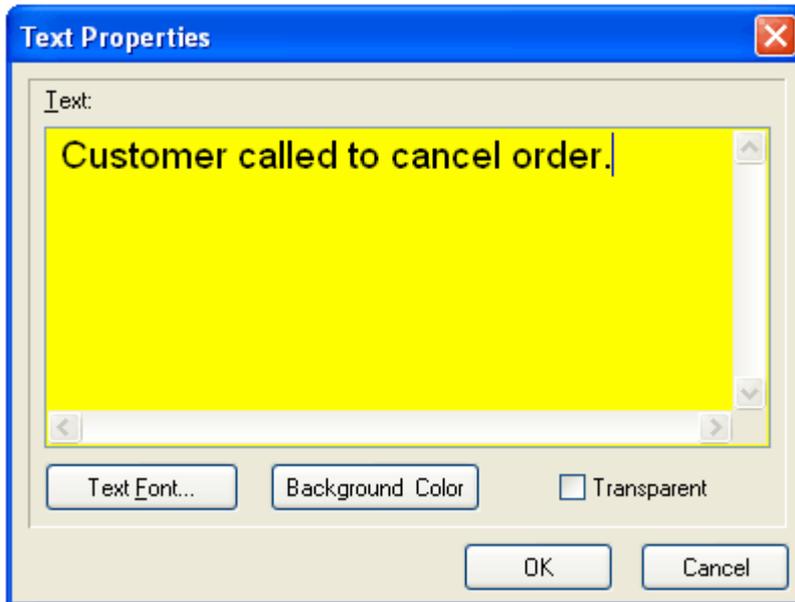
This option is useful if there is sensitive information on a document you don't want others to view. Simply click on the Filled Rectangle Markup icon, then left-click and drag your mouse within the current document to select a zone you want "blacked out" or hidden from view.

## Line Markup

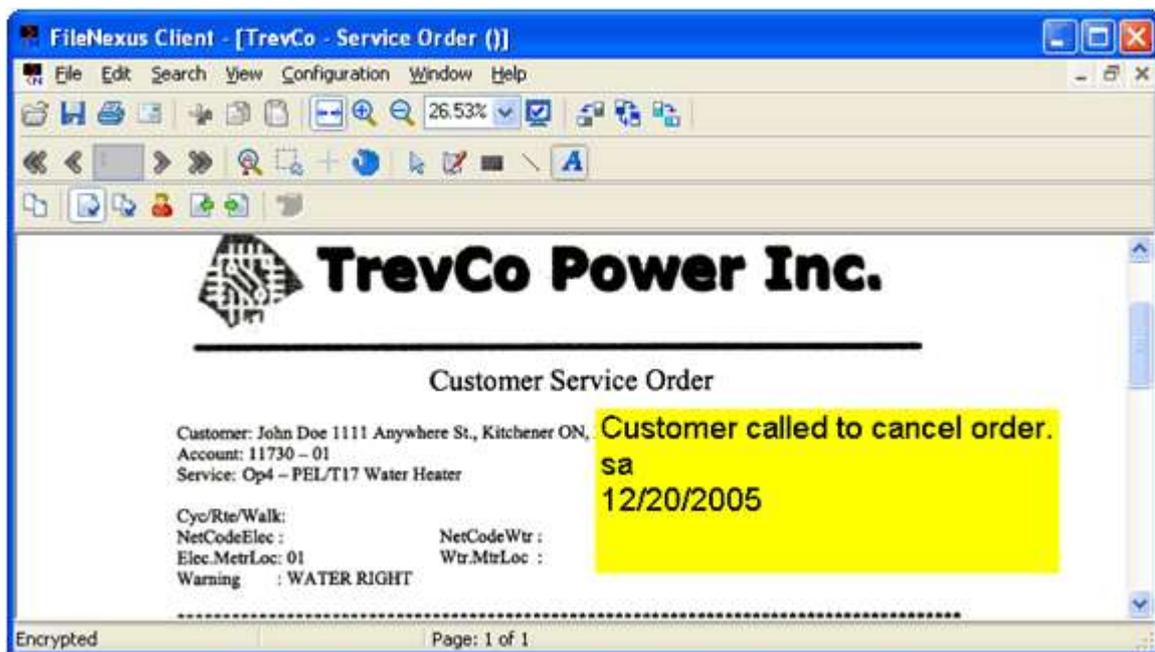
The line markup tool is helpful if you want to draw a link between two or more items on a document. Click on the Line Markup icon and left-click and drag your mouse from point A to point B on the current document to "draw" a line. After you have drawn a line on the document, you can resize, move, or delete it.

## Text Markup

If you wish to put an electronic "post-it" type of note on an image document, click on the Text Markup icon. Then, "draw" a box onto your document. This will open up a Text Properties dialog for you to enter text into.



You can change the font or background colour by clicking on the **Text Font** or **Background Color** buttons. If you don't wish the text markup to obscure the image, check the *Transparent* checkbox. Then hit **OK**. The text markup will then appear on the document with the user login name and date stamp visible.



### Markup All Pages

If you want your markup to appear on every page within a document, and in the same place, click on this icon before creating the markup.

### Markup Application Level

In addition to the type of markup that can be applied to an archived document (Highlighter, Filled Rectangle, Line, Text, or All Pages), FileNexus distinguishes three Markup Application Levels; *Document*, *Class* and *User*. The Markup Application Level defines how a markup will be applied to a document(s) and who will be able to view it.

### Document Markup

A *Document markup* will create a markup only on the current document. This markup will then be viewable by all FileNexus users that have the access rights to a) view the current document and b) to view document markups.

### Class Markup

A *Class markup* will create the same markup as on the current document, on every document having the same document class (e.g. all Outbound Invoices, or all Time Sheets). The class markup will apply not only to all currently archived documents of the same document class, but all documents of the same class that will be archived in the future. This markup will then be viewable by all FileNexus users that have the access rights to a) view the current document and b) to view class markups.

### User Markup

A *User markup* will create a markup on the current document only visible to the user login that created it. This is useful if a user wants to leave himself/herself an electronic reminder note on a document that some action has taken place or needs to be taken.

### Document Navigation

These buttons will allow a user to navigate to the previous or next document respectively, within a *Search Results Grid*. These icons will gray out accordingly if you are currently viewing the first or last document within a *Search Results Grid*.

### View Notes

If any document notes have been added to active document being viewed, the **Note** icon will be enabled (appear in yellow rather than grayed out). Clicking on it will allow you to read the attached note(s). To find out how to add notes to a document, see [Adding Document Notes](#).

## Manipulating Retrieved Documents

### Text document toolbar



#### Printing

The Printer icon allows you to print the current document in the *Preview Pane*. 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.

#### Send or Emailing a Document

The Send icon allows you to email the active document in the *Preview Pane*. By clicking on the send icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the document as an attachment in its native file format (tiff, .doc, .xls, .txt, etc.).

#### Font Select

The Font Select drop down allows you to change the default font type for viewing text documents in FileNexus.

#### Font Size

Clicking on the up or down arrows will increase or decrease the default font size used in viewing text documents in FileNexus. Alternatively, you can enter the numeric value of the font size in the text box to resize the default font.

#### Copy

The Copy icon can be used after you have selected an area of the document to copy to your clipboard. To select a portion of the document, refer to the *Select* icon described later in this document. After you click on the copy icon, you can then paste the copied area of the document to another Windows application (e.g. Word, Paint, Photoshop, etc.).

#### Column Select

The Column Select icon allows you to select a column of data within a text document rather than selecting in paragraph form. To toggle on or off the column select option, simply click on the icon. The column select option is toggled ON when it appears depressed.

#### First Page

If the current document has more than one page, you can navigate to the first page by selecting the First Page icon.

#### Previous Page

If the current document has more than one page, you can navigate to the previous page by selecting the Previous Page icon.

### Next Page

If the current document has more than one page, you can navigate to the next page by selecting the Next Page icon.

### Last Page

If the current document has more than one page, you can navigate to the last page by selecting the Last Page icon.

### Document Navigation

These buttons will allow a user to navigate to the previous or next document respectively, within a *Search Results Grid*. These icons will gray out accordingly if you are currently viewing the first or last document within a Search Results Grid.

### Forms Overlay

Please refer to the [Forms Overlay](#) section.

### View Notes

If any document notes have been added to active document being viewed, the *Note* icon will be enabled (appear in yellow rather than grayed out). Clicking on it will allow you to read the attached note(s). To find out how to add notes to a document, see [Adding Document Notes](#).

### Modify Forms Overlay

Please refer to the [Forms Overlay](#) section.

## Overview

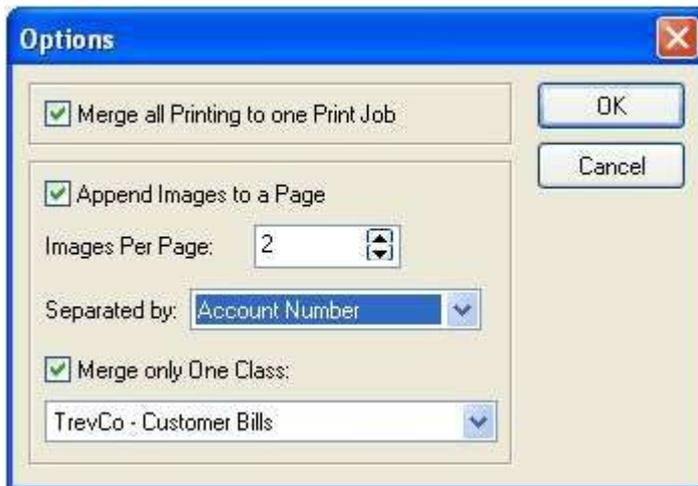
In the FileNexus Client, there are a number of ways in which you can print a document or a group of documents.

### Printing from the Search Results List

To print a document(s) from the Search Results List, simply highlight the document(s) in your *Search Results List* and click on the print icon  in the *Search Results Toolbar*. A print dialog will appear. To set your Print Options, click on the *Options* button.

#### Print options

Print options can be accessed by clicking on the *Options* button from the print dialog box that appears when you click on the printer icon in the *Search Results Toolbar*. The below *Options* window will appear allowing the user to specify more advanced printing options.



#### **Merge printing to one print job**

Select this option if you are printing many small documents. For example, if you are batch printing 500 3-page bills, selecting this option will combine them all into one large print job. Once it is assembled, the entire job will be sent to the printer. If you don't select this option, FileNexus will send 500 individual print jobs to the printer (one job for each 3-page bill). Since most printers have a 2 to 5 second delay between print jobs, printing many documents at once is significantly faster when they are first merged into one print job.

#### **Append images to a page**

If you want to print more than 1 document per page, check this box and select the number of "Images" you want printed on each page. For example, if you wish to print 2 customer bills per page, specify 2 images per page. Of course, you wouldn't want bills for 2 different customers printed on the same page, so you can select the index that you want the documents grouped by. In this example, you might have them broken up by Account Number. This means that FileNexus will print 2 bills on each sheet of paper, but if the account number changes (therefore a different customer), it will print to a new page.

NOTE: Most users will expect that a single document page in FileNexus will be printed to a single page from a printer. In this case, make sure that *Images Per Page* is set to 1. This setting will be remembered as the default for subsequent print requests.

### Merge only one class

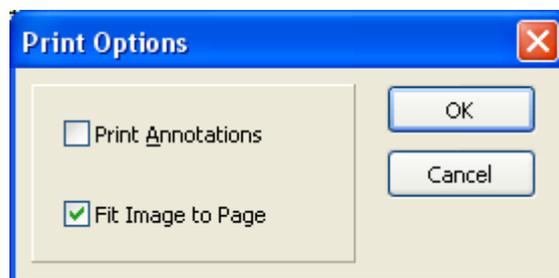
If your Search Results Grid contains more than one type of document class (for example, Customer Bills and Credit Memos), but you only wanted one of the document classes to be printed with more than 1 document per page, you can select the document class from the pull down list. An example of this would be when you are printing both Customer Bills and Credit Memos and want 2 bills printed on each page, but you do not want 2 credit memos per page (since the shrunk down credit memo would be too small to read). Set the Customer Bills as the only document class to merge.

## Printing from a Previewed or Opened Document

To print a document while it is being previewed or is opened in FileNexus (not in its native application like MS Word, Excel, Adobe Acrobat, etc.), click on the print icon  in the *Image or Text Document Toolbar*. To set your Print Options, click on the **Options** button.

### Print options

Print options can be accessed by clicking on the *Options* button from the print dialog box that appears when you click on the printer icon in the *Image or Text Document Toolbar*. The below *Print Options* window will appear allowing the user to specify more advanced printing options.



### Print Annotations

By checking on the option for *Print Annotations*, FileNexus will include any available document Markups (that the user has access rights to view) on the printed copy.

### Fit Image to Page

By checking on the option for *Fit Image to Page*, FileNexus will ensure that a single page of the document to be printed fits a single printed page.

NOTE: Most users will expect that a single document page in FileNexus will be printed to a single page on a printer. In this case, make sure that *Fit Image to Page* is checked ON. This setting will be remembered as the default for subsequent print requests.

### Overview

The *Forms Overlay* module allows a user to view a text document either in plain text or overlay artwork on it so it appears as if it was printed on a pre-printed form. For example, FileNexus users may typically view invoices generated by a host system that contain plain text. With Forms Overlay, you can overlay the artwork of the invoice file so the user sees the invoice as it would appear if had been printed. Overlays can also be applied to PDF documents archived to FileNexus.

The following sections will help you to setup and use *Forms Overlay* in the FileNexus Client application.

[Forms Overlay Setup](#)

[Forms Overlay - Search Results Window](#)

[Forms Overlay for PDF Documents](#)

## Forms Overlay Setup

From the FileNexus Client Application, you can setup and choose to toggle on/off the *Forms Overlay* option for archived text documents.

When searching for Text documents in FileNexus, the *Preview Pane Toolbar* (as shown below) provides the user with available features to manage documents in the *Search Results Grid*.

### Search Results Toolbar



### Forms Overlay Icon

The Forms Overlay icon can be toggled on/off if the currently selected document belongs to a Document Class that has a Forms Overlay Image associated with it. By clicking on this icon (so that it appears depressed as in the above image), when you open the selected document, it will open up as an image appearing as if it had been printed on a pre-printed form with the appropriate artwork. This opened document with a Form Overlay can now be managed as an Image document. To review what options are available to you in managing an image in FileNexus, see the section on [Image Viewing](#).

### Modify Forms Overlay Icon

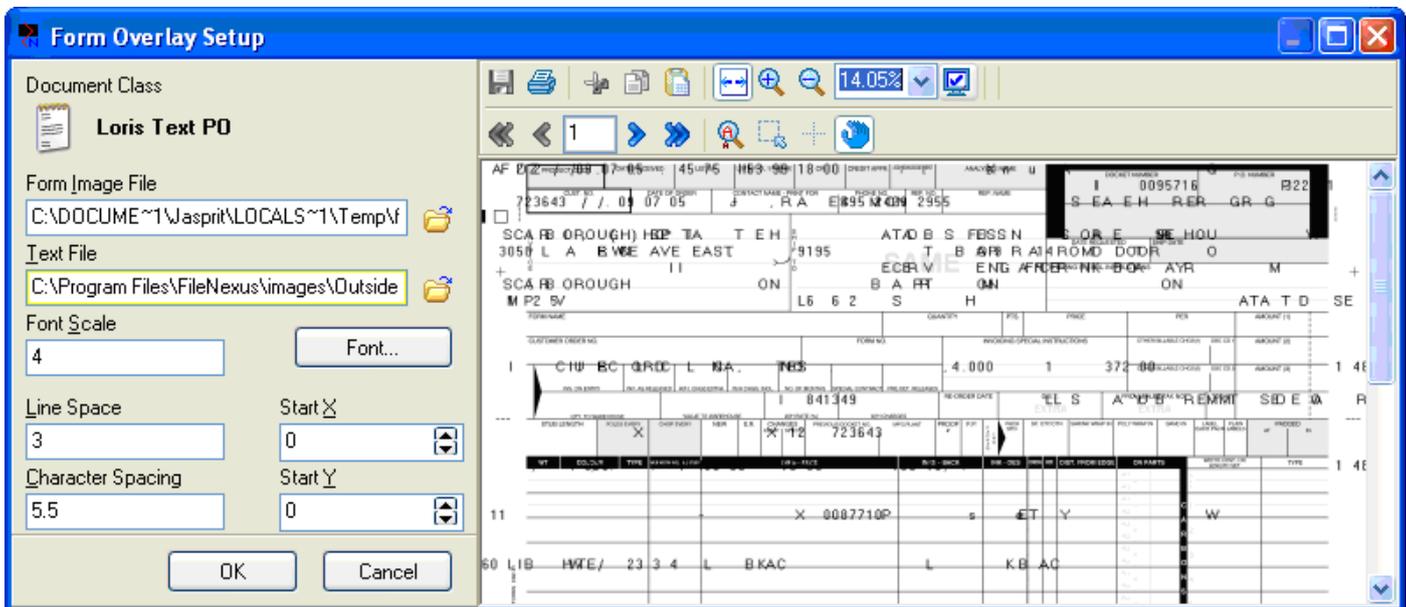
In order to set up a Forms Overlay for a Text Document Class, you will need to open up a representative text document of that class in FileNexus. On the *Text View toolbar* (as shown below), there is a **Modify Forms Overlay** icon that allows you to add/change/delete a Form Overlay on a particular document class.

### Text View Toolbar



By clicking on the **Modify Forms Overlay** icon, you can select, remove, or modify the image or artwork you wish to overlay on the text documents of a particular Document Class. The current document you are viewing *must* belong to the Document Class for which you wish to adjust the Forms Overlay settings.

When you click on the **Modify Forms Overlay** icon, a *Form Overlay Setup* window similar to the one below will appear.



The *Document Class* will clearly appear in the top left of the window, *Loris Text PO* in the above example. On the right-hand side of the window, will be the document display pane. This pane will automatically refresh when you adjust any of the below settings to reflect your changes. Once you are satisfied that the document appears as you wish, hit **OK** to accept the changes or **Cancel** to ignore them.

### Form Image File

The complete network path to an image file (.tif file) that you wish to overlay on the text documents of the displayed Document Class.

### Text File

The complete network path to a sample text file that will be indicative of the archived documents belonging to the displayed document class. This path may point to a Cache directory where the currently selected document is saved.

### Font Scale

A Font setting that can be adjusted (normally between 1.0 and 10.0) to modify the scale of the font that will be the default used when viewing archived documents with Forms Overlay toggled ON.

### Line Space

Setting that can be adjusted to modify the amount of space between lines of text.

### Character Spacing

Setting that can be adjusted to modify the amount of space between characters.

### Start X

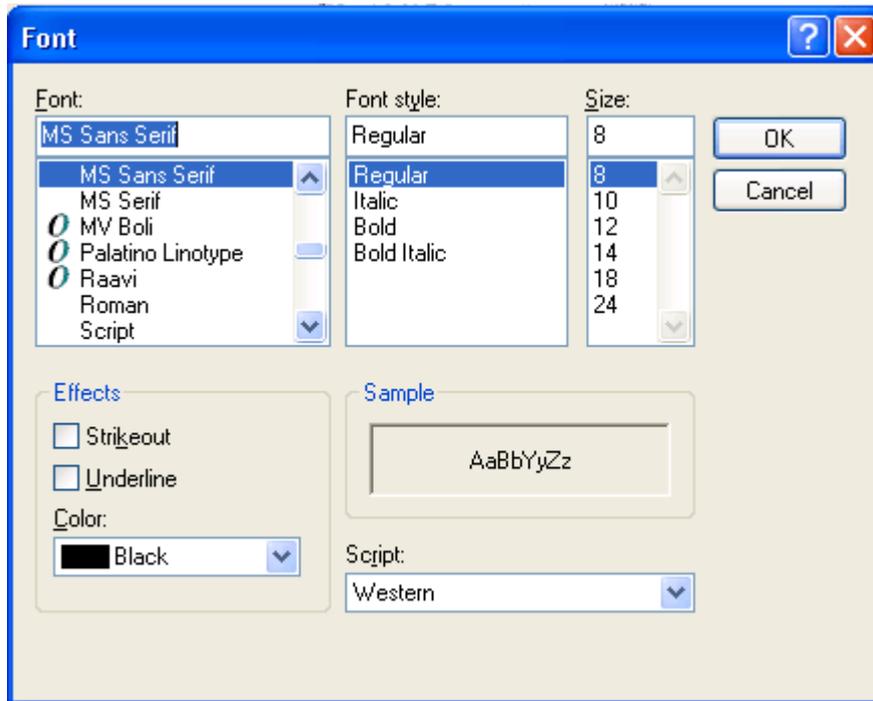
The horizontal offset of how far to the right the text should begin. A higher number will offset text further to the right.

### Start Y

The vertical offset of how far from the top of the page the text should begin. A higher number will offset text further from the top of the page.

## Font

If you click on the Font button, a Font dialog will appear.



From this dialog, you can adjust the font type, style, size and effects. Simply make the necessary changes and click **OK** to accept your changes or **Cancel** to ignore them.

## Forms Overlay - Search Results Toolbar

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



### Forms Overlay

If the *Forms Overlay* icon is depressed, any text document that is set up to use an image overlay will automatically have the appropriate form artwork superimposed over it when you double-click on the document to open it or if you right-click on the document and select *Open* from the right-click menu. If no form or image overlay is available for the document, it will appear as normal.

## Final Note on Forms Overlay Setup

Using the *Forms Overlay Setup* window to configure an image to work with your text documents in FileNexus may prove challenging to some users. There is no standard guideline as to what your settings should be to optimize how documents appear when using forms overlay. There is no default or standard for these settings as your organization is in complete control of how the text and tiff overlay documents are formatted, and your format may be very different from the format of text and image documents being created by other FileNexus customers. By adjusting the various settings in the Forms Overlay Setup window, even just a little, you will find the way that the document appears can vary greatly.

If you have further questions on how to employ Forms Overlay with FileNexus, feel free to contact support at Lorix Technologies at (416) 252-4701 ext. 230.

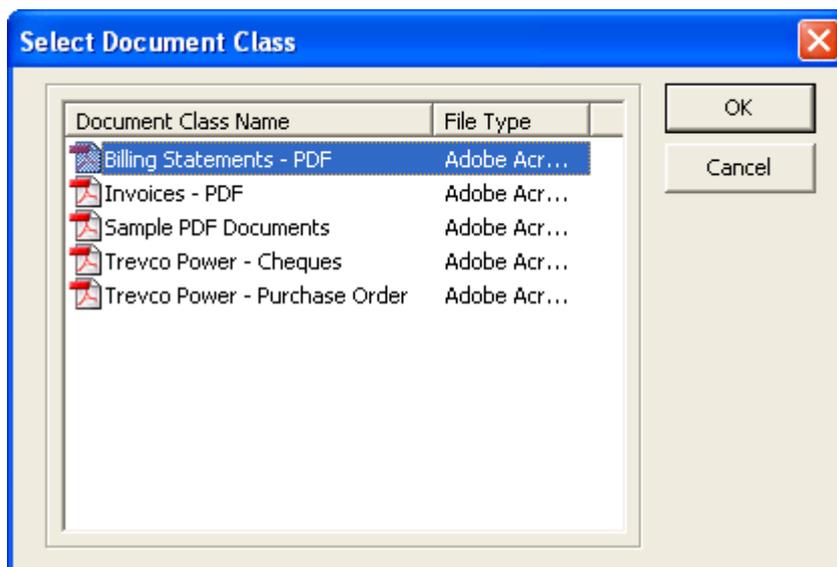
## Overview

Some PDF documents that are archived to FileNexus may be of a standard format and only include data and some minimum of formatting when archived to FileNexus. A typical example of PDF documents that may fit this example are Customer Billing Statements from a City Power or Utility corporation. In this case, statements that may normally get printed and mailed out on pre-printed stock paper that includes the corporation's logo and address information may now be lacking the artwork that would be on the printed stock. To rectify this situation, FileNexus supports PDF Overlays for archived PDF documents.

To set up a PDF Overlay, you must have the following:

1. The name of the Document Class whose documents you wish to overlay artwork or a company logo.
2. A saved tiff image of the artwork/logo to superimpose on the relevant Document Class. This tiff should be the same page size as the document page size for the desired Document Class.

To add the tiff as a PDF Overlay to a Document Class, go to the *Configuration* menu in the FileNexus Client and select *PDF Overlay*. By selecting the *PDF Overlay* option, a FileNexus Administrator may select a PDF Document Class to which a Tiff image or artwork overlay should be applied.



Highlight the *Document Class* from the list provided and then hit **OK**. In the subsequent *Open* dialog window, browse to and select the Tiff image that should be used as an overlay for the document class and click the **Open** button.

Now, users will have the option to view the documents of the relevant PDF Document Class with or without the *PDF Overlay*.

## Markups and Annotations

Once a document has been archived in the FileNexus system you cannot erase or modify it. However, it is possible to add annotations and markups to a document. Markups (highlights, blackouts, lines, notes etc.) appear on the document and print out with the document, but they can be turned on and off at any time (assuming that you have the necessary user access rights). Therefore, if needed, you can always see the original (unmarked) document.

For a comprehensive detailing of how to manage documents in FileNexus, Markups and Annotations, please see the sections on [Image Viewing](#) and [Text Viewing](#).

## Moving Files and Folders

### Moving Folders

In the FileNexus Client, users can move folders by "dragging and dropping" them, just as you would in Microsoft Windows Explorer. This means that you can click on a folder called Smith & Company, and while holding down the left mouse button, drag and drop it into a folder called New Clients. The Smith & Company folder (and all of the documents it contains) will become a sub folder of the New Clients folder.

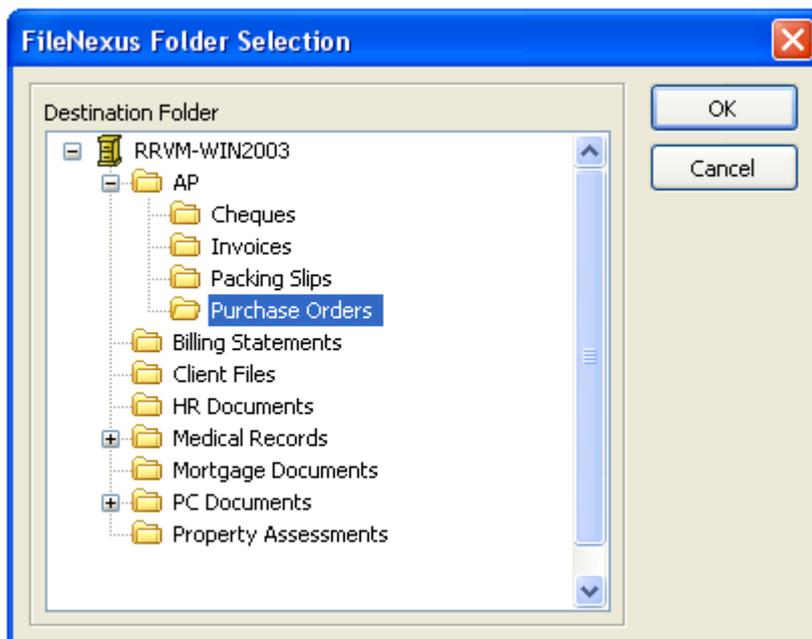
### Moving Files

To move individual documents from one folder to another, you must first search for the documents you want to move, and then highlight the document(s) with your mouse. Now you can drag them into the folder of your choice. In order to move files you will need to have 2 windows open; the Search Results Grid window (list of retrieved documents matching search criteria) and the Folder Tree view (displays the available folders). Alternatively, you may use the Move To icon from the Search Results Toolbar to move 1 or more documents.

### 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.



## Client Archiver Overview

The *FileNexus Client Archiver* is an end-user application that allows you to archive any computer generated file (word-processing document, spreadsheet, CAD file, sound file, image file, etc.) from your PC to the FileNexus System by simply dragging (or saving) the document into a monitored archival directory and providing FileNexus with minimal class and index information.

[Setting Up the Client Archiver](#)

[Using the Client Archiver](#)

## Setting up the Client Archiver

If your organization has the FileNexus PC Data Module, you have the ability to archive any PC generated documents directly from your PC to the FileNexus System.

1. Install the FileNexus Client onto your PC. This will automatically install both the FileNexus Client (used for viewing and managing archived documents) and the FileNexus Client Archiver (used to archive PC files) if you have the correct License Serial Key.
2. Create a new folder on your Windows Desktop (or a convenient location on your PC) and name it something that you'll recognize as a "to be archived" folder, like "My Archive".



3. Start the Client Archiver from *Start* → *All Programs* → *FileNexus* → *FileNexus Client Archiver*. The Client Archiver icon (a drive with a CD) will appear in your Windows System tray (usually bottom right of your monitor).



Right-click on the *Client Archiver* icon and select *Settings*.



The *Settings* window will appear in which you can set the monitored *Archive Directory* to the folder you created on your Desktop.

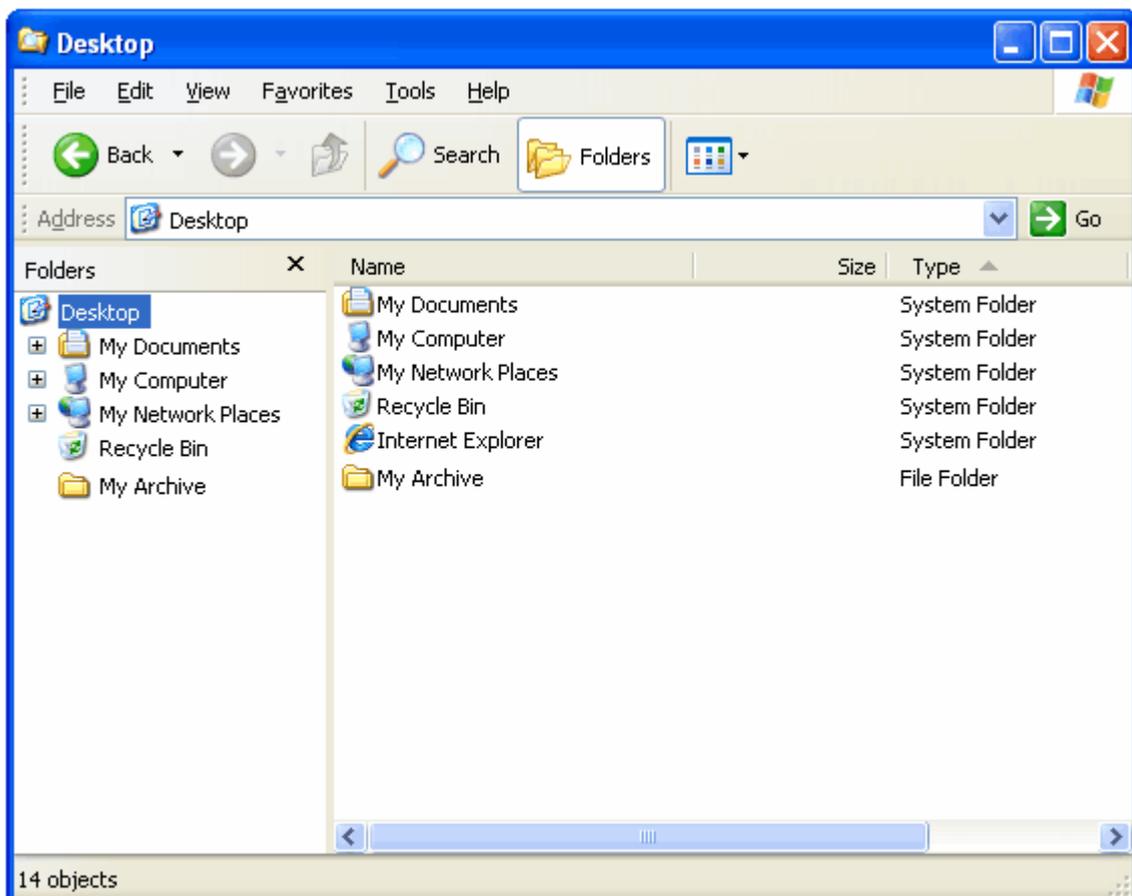
## Settings Window

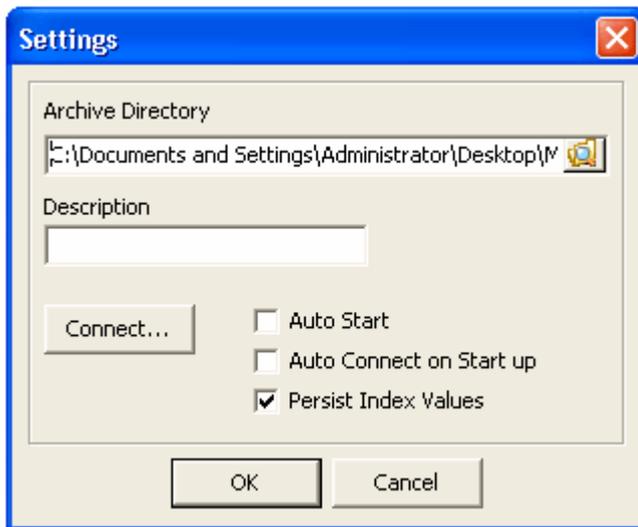


### Archive Directory

When the Client Archiver is running, it will monitor this directory. Whenever it detects a new file in this directory, it will try to archive the file. Note that FileNexus will erase all files placed into the archival directory after they have been archived. If you want to retain a copy of the file on your local PC, simply keep a copy of the File in another directory.

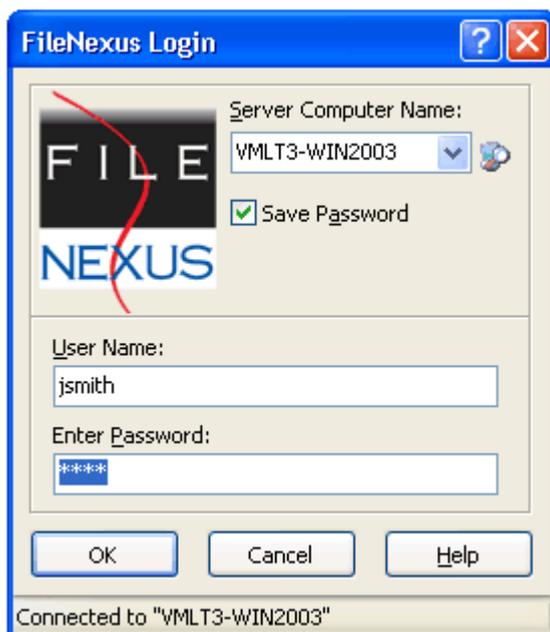
It's usually a good idea to create a folder on your *Desktop* called *My Archive*. Then, in the Client Archiver, set this directory as your archive directory. Directories created on the Windows Desktop are easy to navigate to in *Windows Explorer* - they are found in the root of the *Desktop* in the Windows Explorer Tree (as seen below).



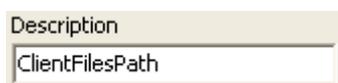


### Connect

If you click on **Connect**, you can login to FileNexus using your User Name and Password and hitting **OK**. You must be connected to FileNexus in order to archive a new document.



### Description



By entering a “description” in the provided edit box, the Client Archiver will push the documents being archived to a predefined path on the FileNexus Server. By default, there is a single directory on the FileNexus Server that accepts ALL Client Archiver documents. However, if your organization needs to separate documents archived using the Client Archiver into different network directories, a FileNexus Administrator can set up additional paths on the FileNexus Server in the Windows Registry. Refer to [Description Paths in FileNexus](#) for more information.

- Auto Start
- Auto Connect on Start up
- Persist Index Values

### **Auto Start**

Checking on this option will start the monitoring of the defined Archive Directory as soon as the user invokes the Client Archiver program and it appears in the Windows System tray.

### **Auto Connect on Start up**

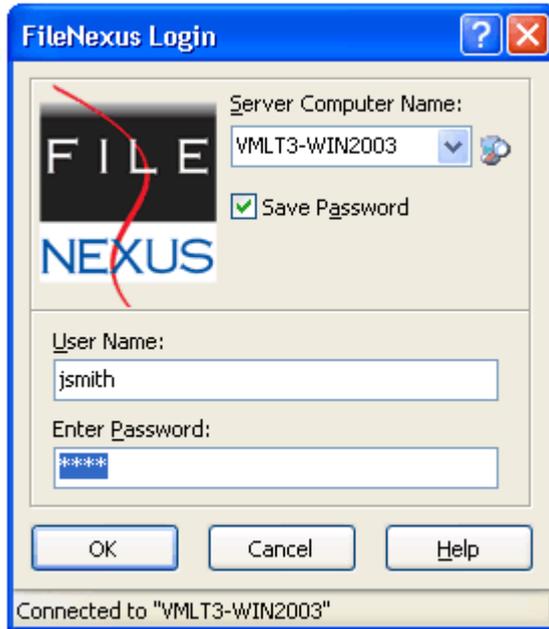
Checking on this option will automatically login a FileNexus user (provided he/she has *Save Password* checked on in the login screen) when the monitoring of the Archive Directory is started in the Client Archiver (by right-clicking on the Client Archiver icon and selecting *Start Archiver* or the *Auto Start* option is checked on and the program has been launched).

### **Persist Index Values**

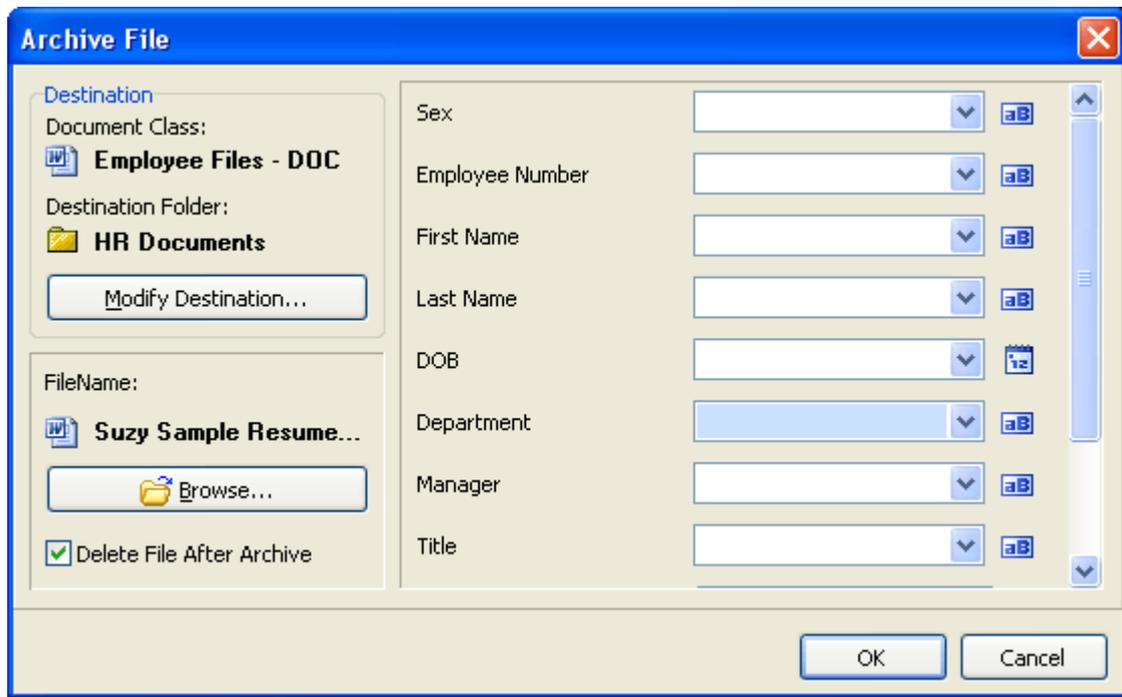
Checking on this option (which is turned on by default) will allow FileNexus to keep track of previously entered index values and have them reappear in the *Archive File* dialog for quicker data entry. However, you may not wish to have persistence turned on if your input will be unique for each document being archived. In that case, it may be disruptive to have old index values appear in the *Archive File* dialog when archiving a new document and you may wish to have this option unchecked.

## Using the Client Archiver

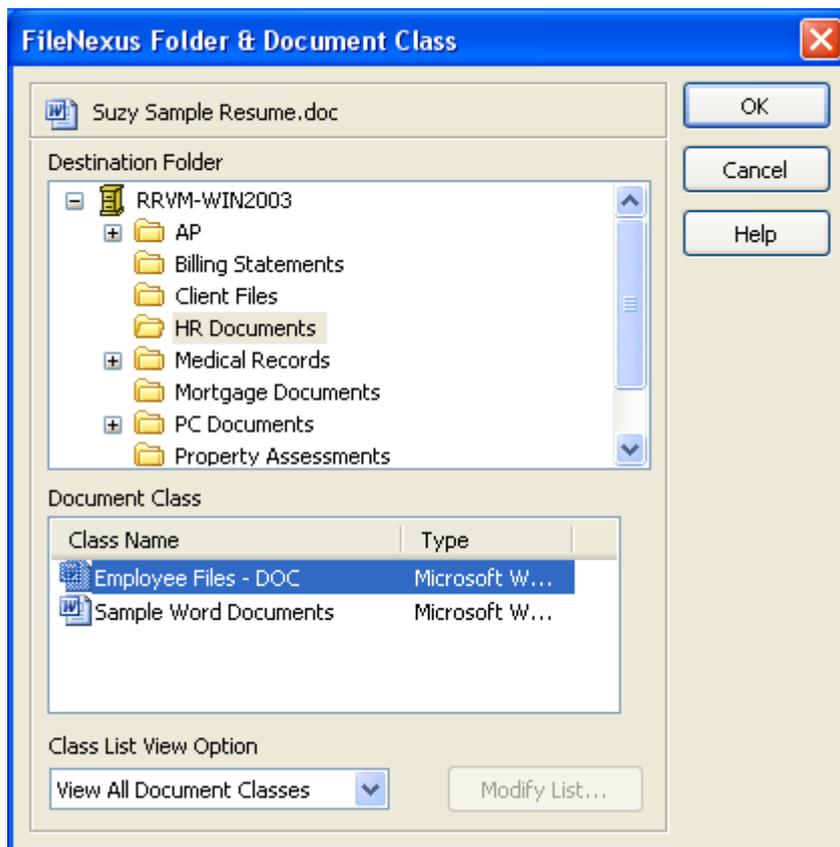
1. Save or copy a document to your *Archival Directory (My Archive)*.
2. Start the Client Archiver from *Start → All Programs → FileNexus → FileNexus Client Archiver*. The *Client Archiver* icon (a drive with a CD) will appear in your Windows System tray (usually bottom right of your monitor). You may be prompted to login to FileNexus unless you have set the Client Archiver to *Auto Connect at Start Up*. 



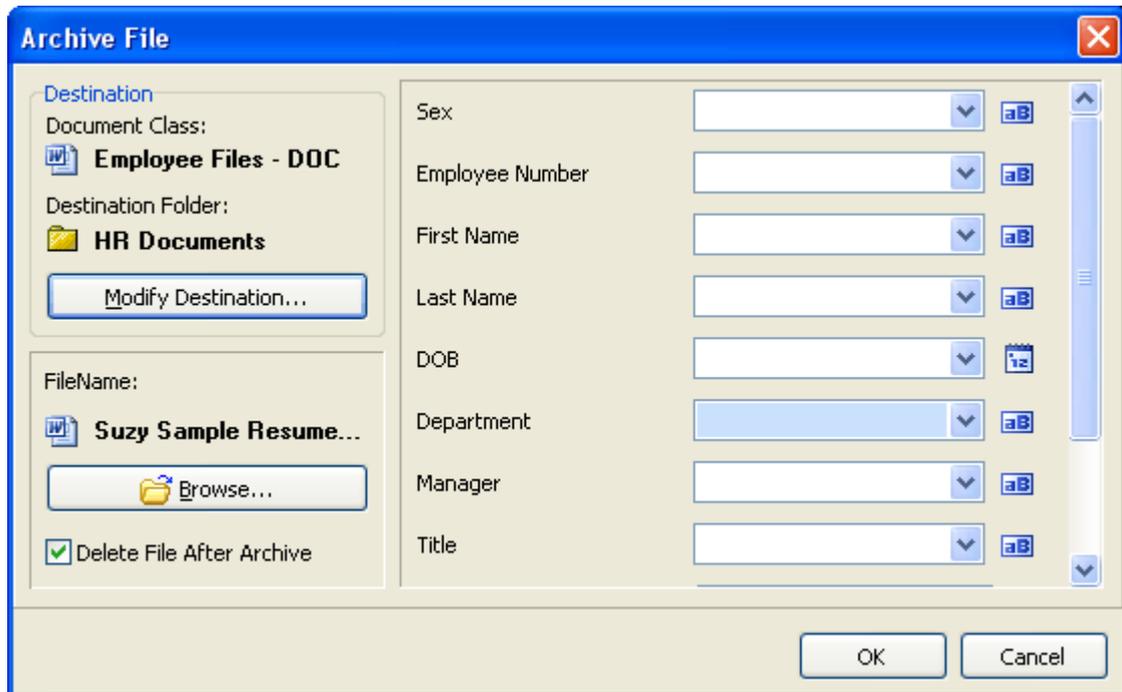
3. After you have successfully logged into the FileNexus, the *Client Archiver* will detect a new document for archival and open an *Archive File* window. The window will default to the previously chosen *Document Class* and *Destination Folder* for the last document that was archived (provided the last document had the same file extension).



4. If the document that you would like to archive should belong to a different class than the previous document archived, click on the **Modify Destination** button and select the correct Destination Folder and Document Class in the *FileNexus Folder & Document Class* dialog before hitting **OK**. In this dialog, a user will only see the folders that he/she has access rights to view.



5. Now that you have told FileNexus what type of document to expect and what folder to put it into, FileNexus will prompt you to enter index values for the document.



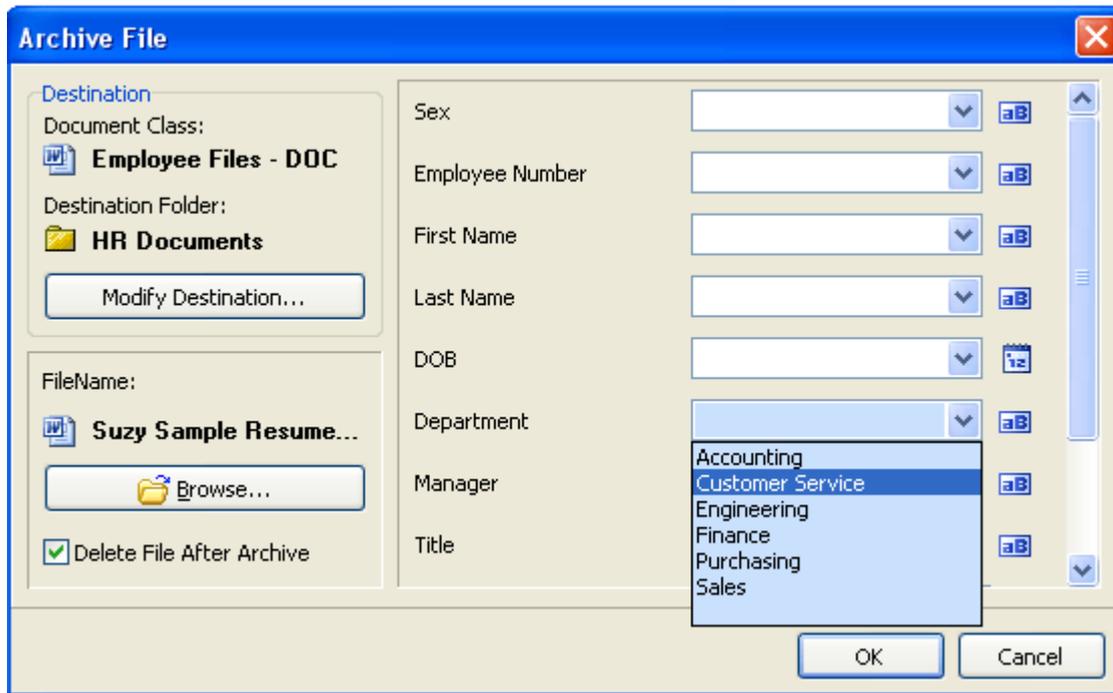
On the left hand side of the screen, you will see a box displaying the name of the file currently being archived (Customer Data.doc in the previous example), the folder the document is going to be placed into (Sample Word), and the file's document class (General Word Docs).

6. Key in the necessary index information. If the data to be entered is a date data type, you can double-click in the white space of the index input box/drop down and a calendar will appear for you to choose a date.

The Client Archiver "remembers" important information in an effort to make archiving as easy as possible. For example, if you archive a spreadsheet document to a Document Class called *Spreadsheets* to a folder called *Financial Reports*, the next time you archive a spreadsheet, FileNexus will default to the *Spreadsheets* class and the *Financial Reports* folder - all you have to do is type in the index values. In fact, FileNexus will even display the last index values you used when you archived a Spreadsheet document (if persistence is checked ON).

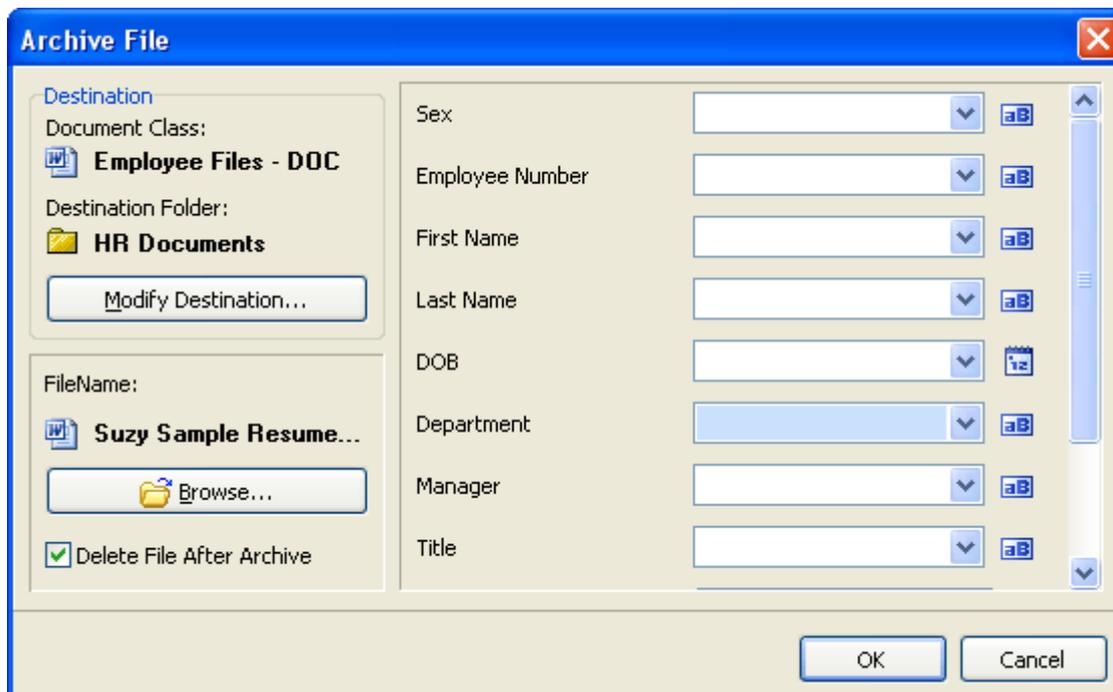
7. When you are finished entering index information, click on **OK** to send the document to the FileNexus system. If you have further documents to archive to the FileNexus system, simply repeat steps 1, and 3 - 7.
8. To stop the Client Archiver, right-click on the *Client Archiver* icon and select *Stop Archive*. Selecting *Close* from the right-click menu will shut down the application completely.

If you have a particular index on a document class or several document classes that requires pre-determined input, you can set up pre-populated drop down menus or "Pick-lists" to ensure consistent data entry, as shown in the following example.



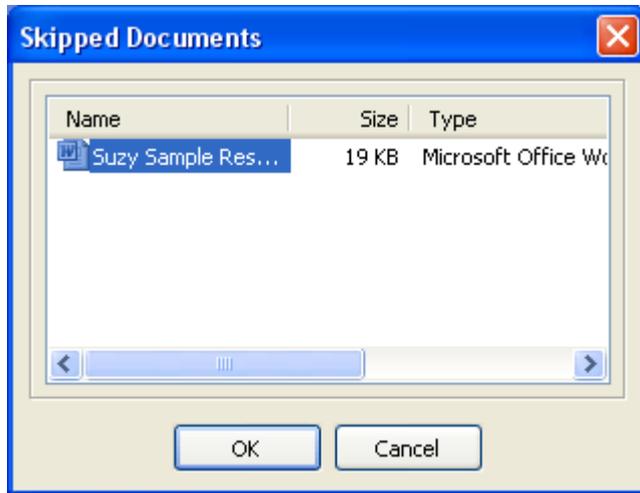
Any indexes for which an Input Pick-list has been set up will appear highlighted in blue to clearly indicate to the user that they may select the index value from the pre-populated drop down. To set up input pick-lists for the Client Archiver, refer to the section of the *Data Capture Setup* program called [Input Pick-lists](#).

When running the *FileNexus Client Archiver*, you may mistakenly copy/save a document in the *My Archive* folder that you don't want to archive to FileNexus. If this happens and you see the *Archive File* window pop up, simply hit the **Cancel** button and delete the document from the *My Archive* folder.



On the other hand, if you are in the middle of archiving documents and you need to cancel the indexing process, you can hit **Cancel** in the *Archive File* window and

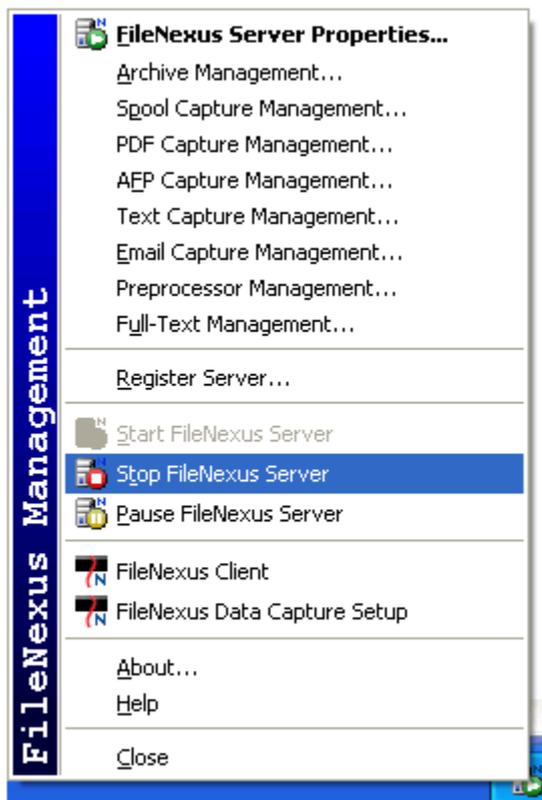
resume archiving/indexing the document at a later time. This “skipped” document will need to be addressed in a different manner when you resume indexing/archiving. When you are ready to index/archive a document that you “skipped”, right-click on the Client Archiver icon in your Windows System tray and select *Archive Skipped*. A *Skipped Documents* dialog will appear where you can choose the document you wish to resume archiving. Highlight it in the window and hit **OK**. You will then return to the *Archive File* window where you can continue as normal.



## FileNexus Database Setup Program

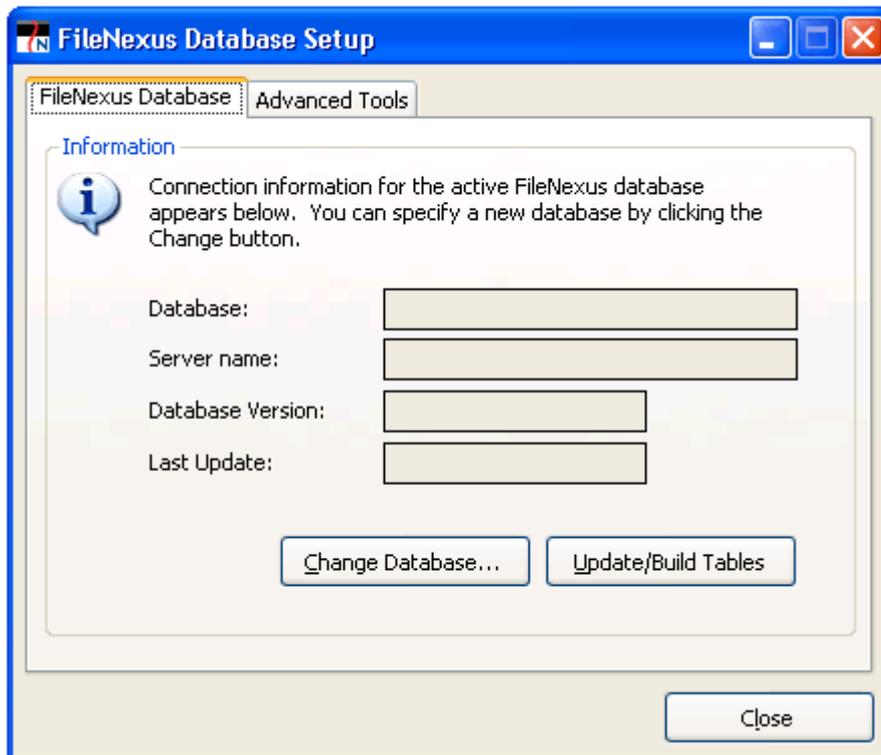
Before you can run FileNexus, you must first create a link between FileNexus and the SQL database that you created earlier. To do this, run the **FileNexus Database Setup** program from the **Start** menu.

**NOTE:** In order to run most of the functions in the FileNexus Database Setup program, all FileNexus users must be logged off the FileNexus system as you **MUST** stop FileNexus in order to proceed. To stop the FileNexus Server, you must right-click on the FileNexus Management icon in your Windows System tray (on the FileNexus Server) and select **Stop FileNexus Server**.



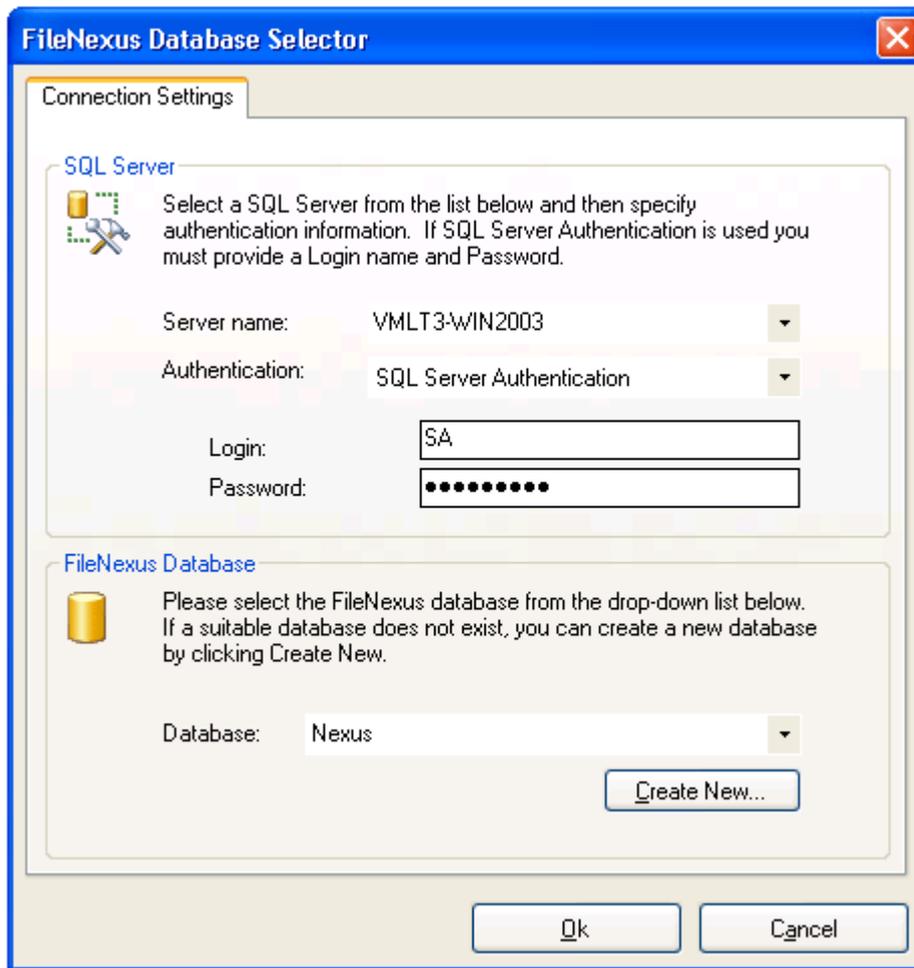
In the Database Setup program, remain on the [FileNexus Database tab](#).

## FileNexus Database Tab



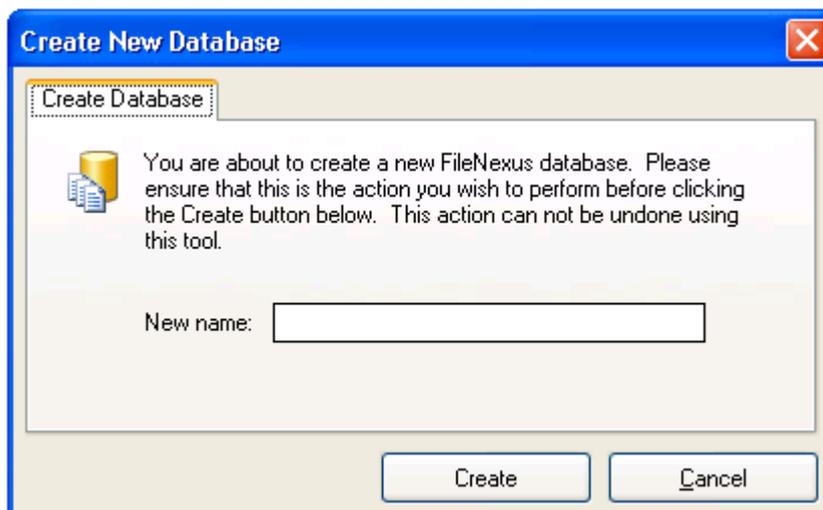
If all of the edit boxes appear blank as shown above, click on **Change Database** which will open up a new window displaying a **Connection Settings** tab.

1. In the **FileNexus Database Selector** window, enter or select the name of the Server on which SQL Server is installed on the **Connection Settings** tab. Leave **Authentication** as “SQL Server Authentication”.



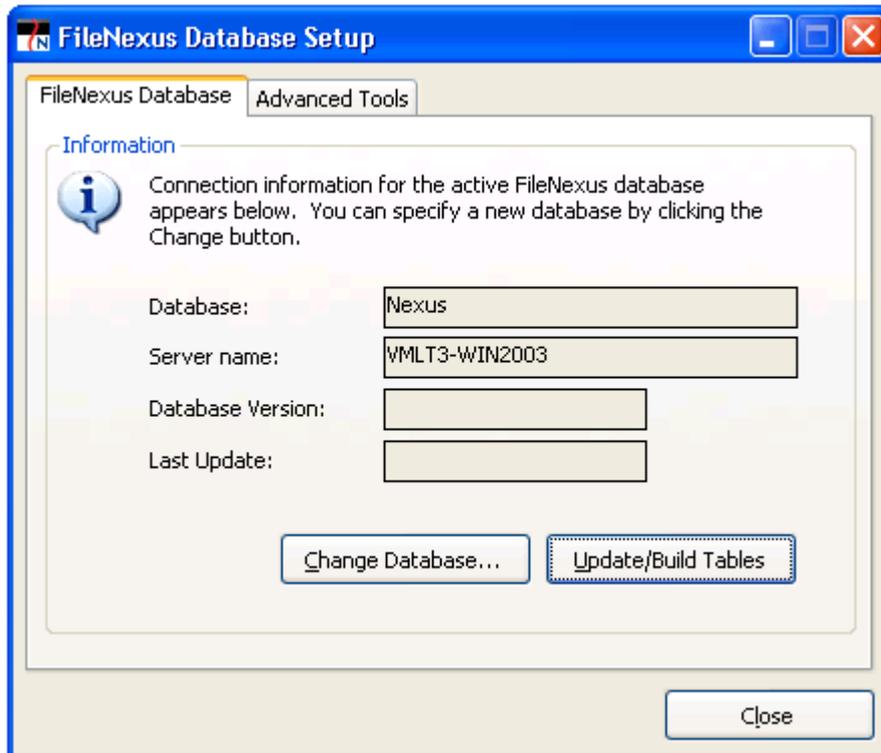
2. Enter a specific username and password to log into SQL Server. The username should be SA or another user in SQL Server that has administrative or dbowner rights on the FileNexus Database you created earlier. The password should be the user's password in SQL Server.
3. Choose the **Nexus** database (that you created earlier) from the **Database** drop down.

If you have not yet created a database in SQL Server to be used by FileNexus, click on **Create New**. In the **Create New Database** window, enter the name of your FileNexus Database (Nexus, as a suggestion) and hit **Create**.

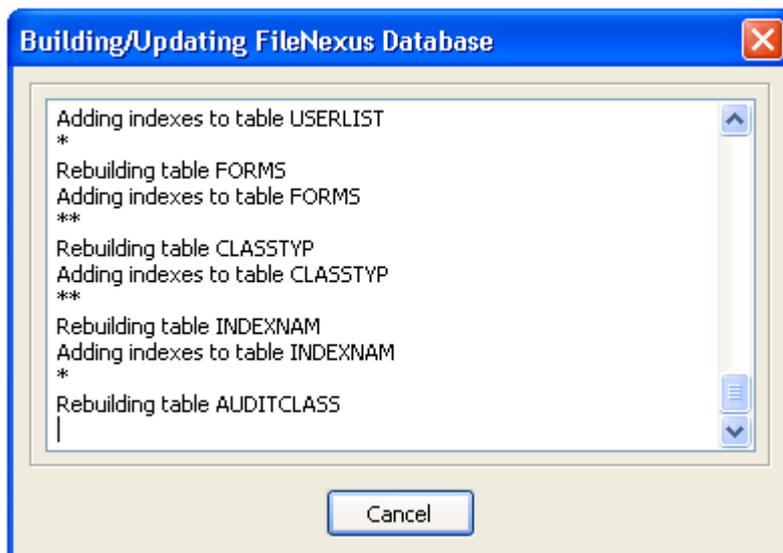


You will be prompted to confirm the creation of a new database. Click Yes. The Create Database window will disappear when the database has been created successfully.

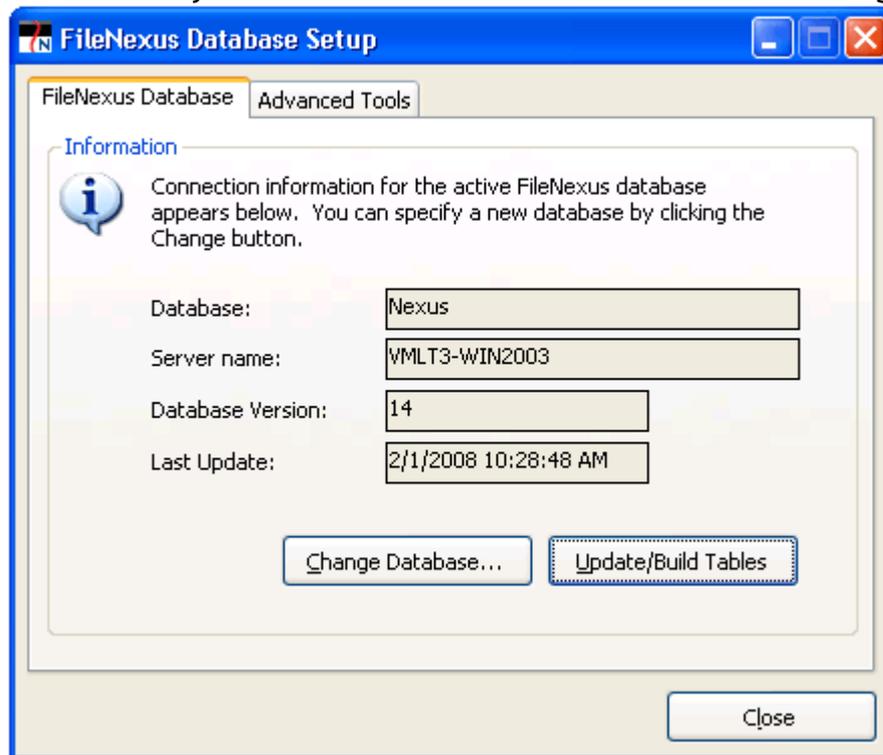
4. When you have finished, click **OK** on the **Connection Settings** tab. This should return you to the **FileNexus Database** tab of the FileNexus Database Setup application window.



5. Click on the **Update/Build Tables** button. While FileNexus is updating/building tables, the following window may appear.



6. After the update is finished, the **Database Version** and **Last Update** fields should be filled in and your window should look similar to the following image.



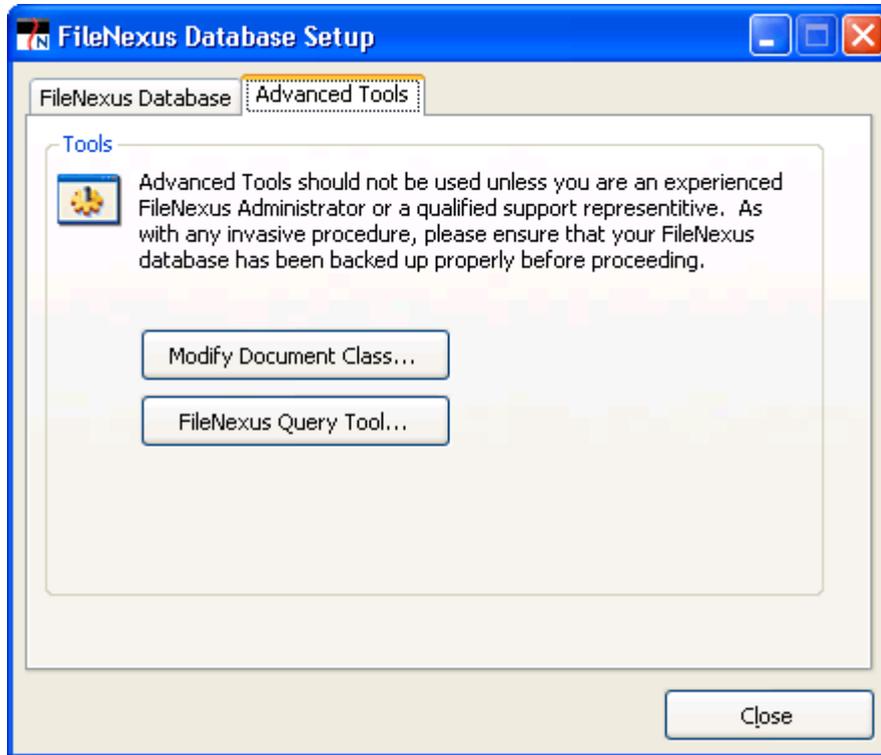
You will now have one of three things accomplished.

1. If this is the first time you are establishing a connection between FileNexus and SQL Server, the necessary tables and links will be created in the **Nexus** database.
2. If you have previously installed FileNexus and are running an older version than the newly installed version, your existing database will be upgraded so that it can be used with the latest FileNexus version.
3. If you have recently had to re-install SQL Server 2000/2005 or restore a backup copy of the **Nexus** database, clicking on Update/Build Tables will re-establish the connection between FileNexus and the SQL Server database it employs.

As a FileNexus Administrator, you may have a need to use the **Advanced Tools** offered in the FileNexus Database Setup program from time to time. Proceed to the next section on the [Advanced Tools tab](#) for more information.

## Advanced Tools Tab

The Advanced Tools tab in the FileNexus Database Setup program allows FileNexus administrators to change any existing Document Classes or conduct queries directly on the FileNexus SQL database for information gathering or advanced trouble-shooting.



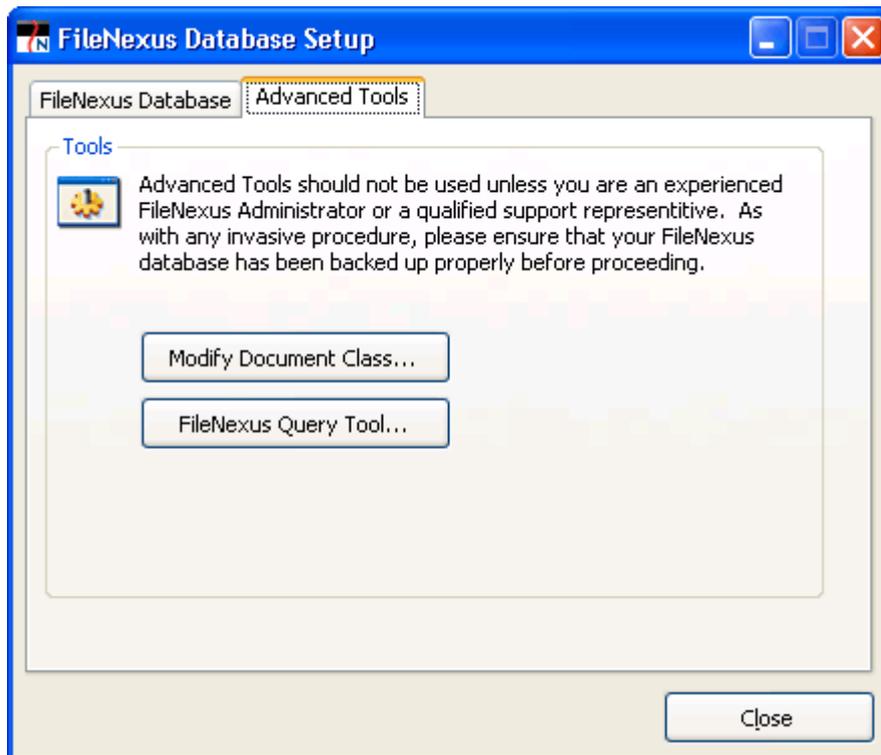
## Modify Document Class

This section describes how you can add, delete, or modify indexes from existing document classes. You should have a complete backup of your FileNexus database before using these features. Document Classes may only be deleted if no documents have been archived to them. Since the FileNexus database is being updated during this process, you must stop all FileNexus programs (Auto Archive Services, Capture Services, and disconnect any Client stations) before making any changes. You can stop the FileNexus Services and disconnect users from the system using the [FileNexus Management](#) utility.

**NOTE:** After adding, deleting, or modifying an index, you should click on the **OK** button, which returns you to the Advanced Tools tab. If you need to modify more than one index, then you'll need to repeat this process several times.

## Adding Indexes

To add indexes to a document class, click on the **Modify Document Class** button on the **Advanced Tools** tab.



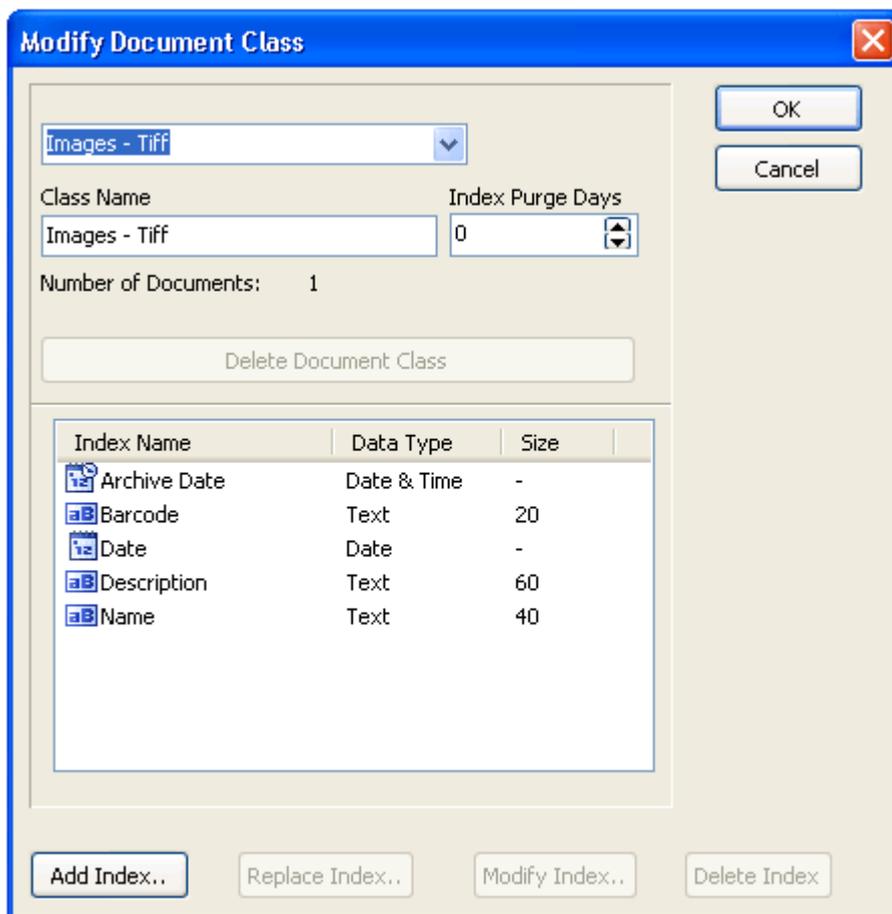
A warning will appear and you must wait 30 seconds before you can click the **OK** button.



You can wait 30 seconds or you can scroll down to the bottom of the warning message and click in the bottom left corner of the message pane and then hit **OK**.

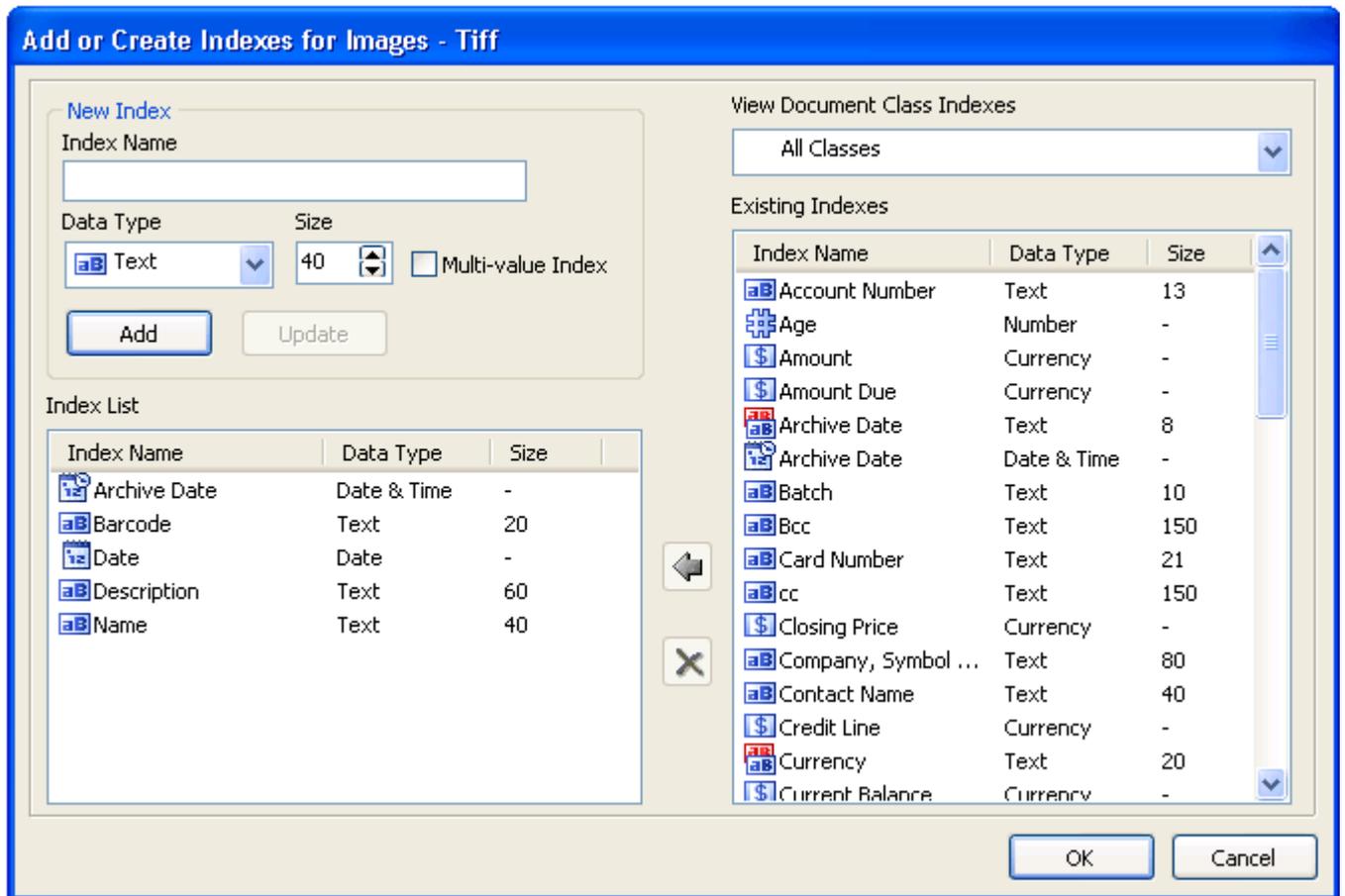
Once you have clicked the **OK** button, you will be prompted to login to the FileNexus System. The **Modify Document Class** window will appear after you have successfully logged into FileNexus.

In the **Modify Document Class** window, select the document class you wish to modify from the drop down. The document class information will auto-populate in the window, as shown below.

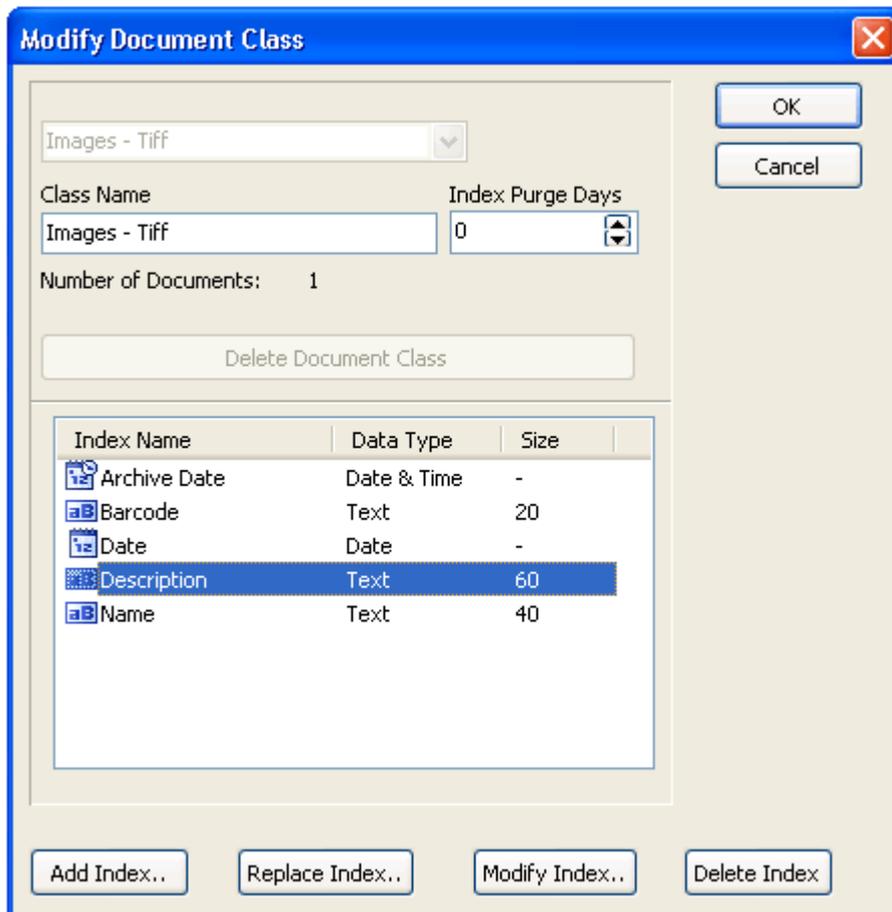


Click on **Add Index** to open the **Add or Create Indexes** window.

From this window you can enter a new index name, index size and the index data type then click on the **OK** button. Or, if an index already exists in an existing Document Class, you can select the index name from the **Existing Indexes** list, verifying the data type and size to ensure it will meet your needs, and click on the left pointing arrow to add it to the **Index List**. Create or add all necessary indexes and then click on **OK** to save your changes or **Cancel** to close without saving your changes.



After hitting **OK**, you will be returned to the **Modify Document Class** window.



## Replace, Modify, and Delete

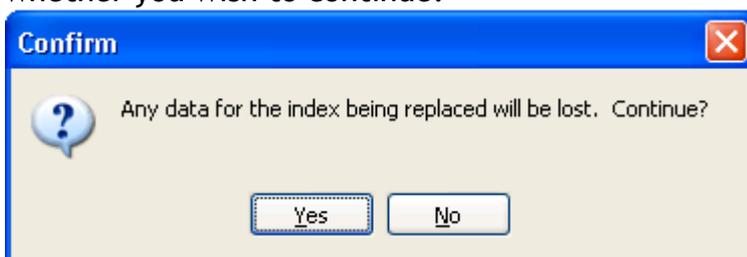
From the **Modify Document Class** window, you can also choose to **Replace**, **Modify** or **Delete** an Index in a selected Document Class.

If you highlight an index, the **Replace Index**, **Modify Index**, and **Delete Index** buttons will become enabled as shown above. Before making your changes, be sure that they will not adversely impact on previously archived documents. For example, you should not attempt to change the data type of an index from **Currency** to **Date** as the SQL database will likely not be able to carry out the transaction. Or, if you wish to decrease the index size of a text index, you may truncate values already stored in archived documents.

If you wish to remove an index from a document class, be **ABSOLUTELY** certain that you no longer need the information contained in that index before removal, as you cannot reverse this type of change on a document class.

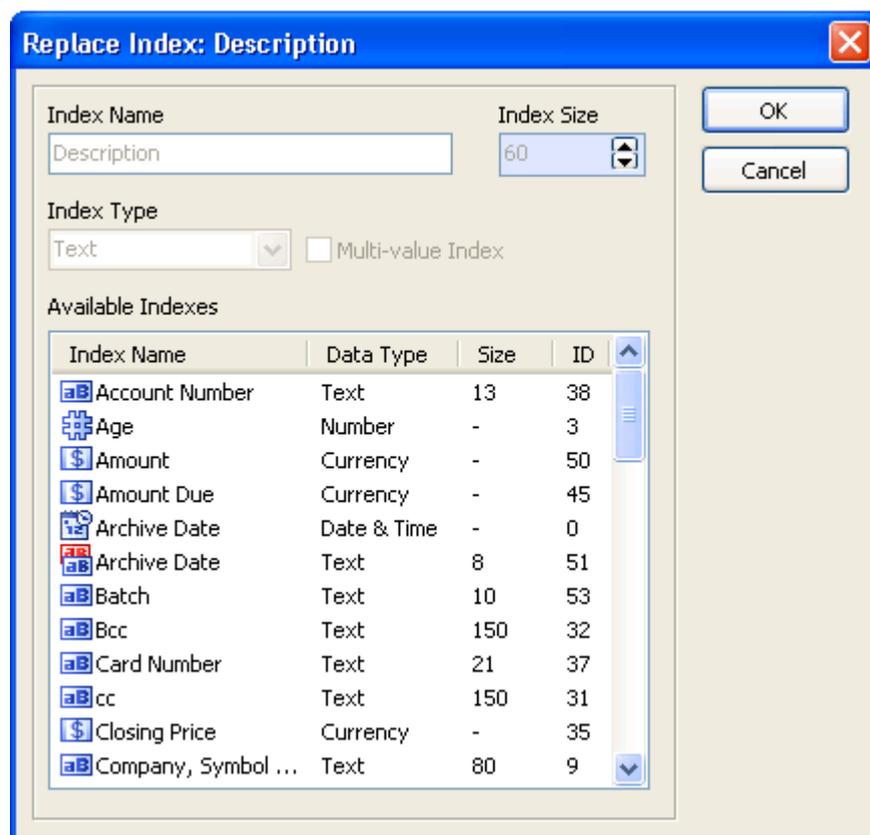
### Replace Index

When you click on the **Replace Index** button, a warning message will appear confirming whether you wish to continue.



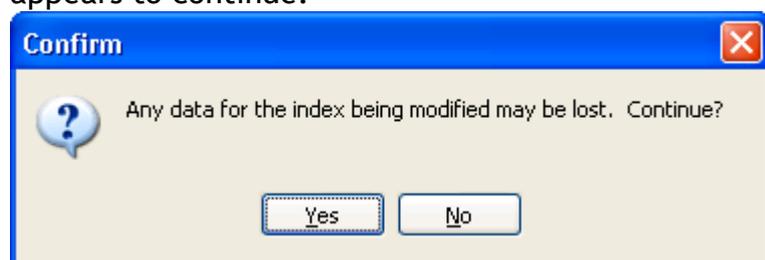
Click on **Yes** to continue, if you are sure that you wish to swap out an Index with a different one and thereby lose any index data on previously archived documents that was in the Index being replaced.

The **Replace Index** window will appear. Highlight the index you wish to add in place of the index being replaced, and hit **OK** to save your changes and return to the **Modify Document Class** window

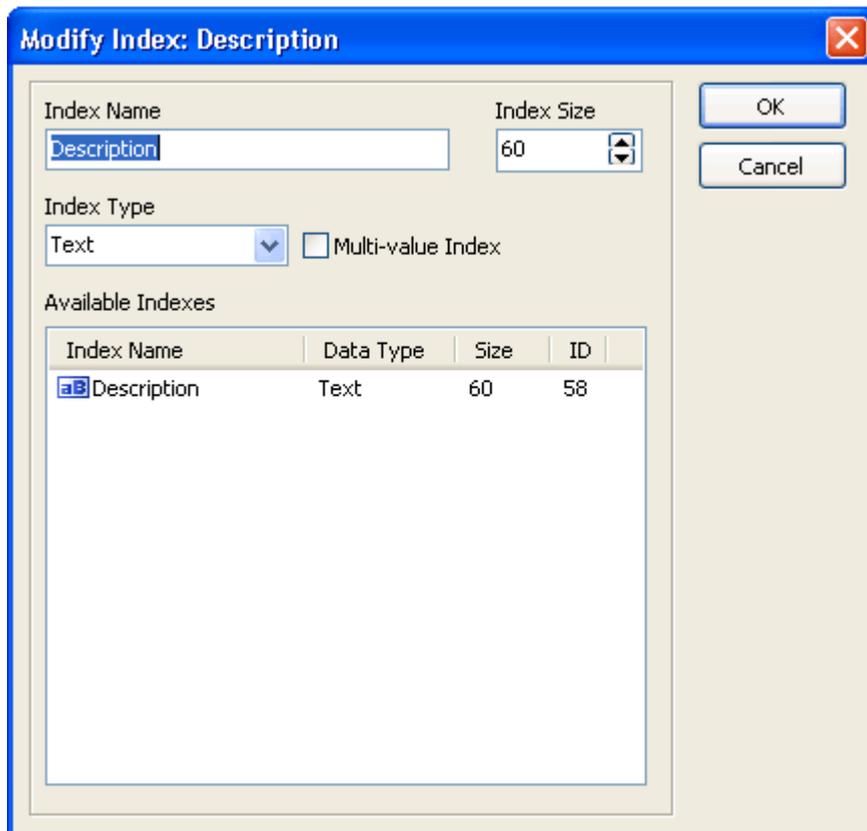


**Modify Index** Modify Index..

When you click on the **Modify Index** button, click **Yes** on the confirmation message that appears to continue.



The **Modify Index** window will appear. From this window, you can increase the **Index Size** of the index, modify the **Index Type** (data type), or change the index to a **Multi-value** index if it is a **Text** index and no other **Multi-value** index exists on the **Document Class**.



Hit **OK** to save your changes and return to the **Modify Document Class** window.

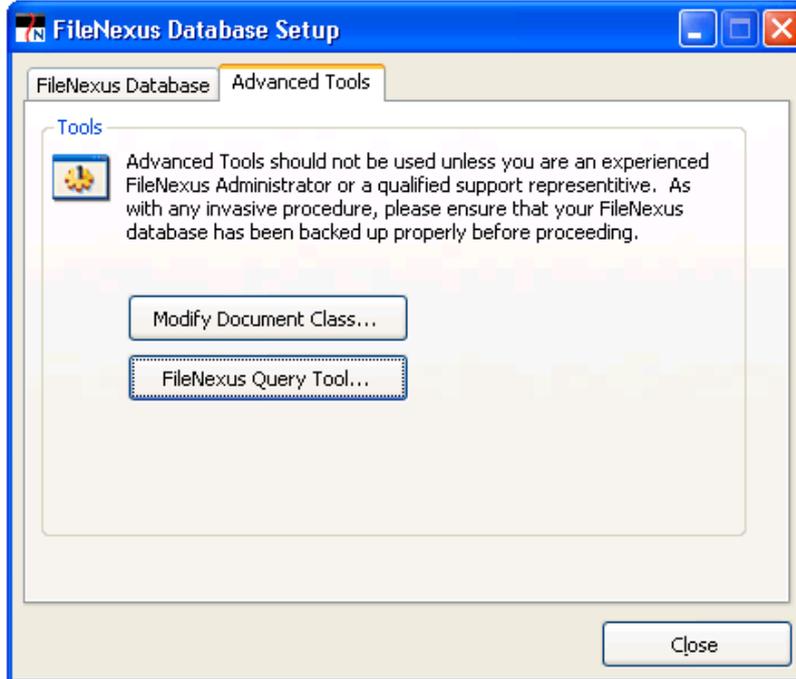
### Delete Index

By clicking on the **Delete Index** button, the following confirmation message will appear asking you to confirm whether you wish to delete the index. Click on **Yes** to confirm or **No** to cancel and return to the **Modify Document Class** window.

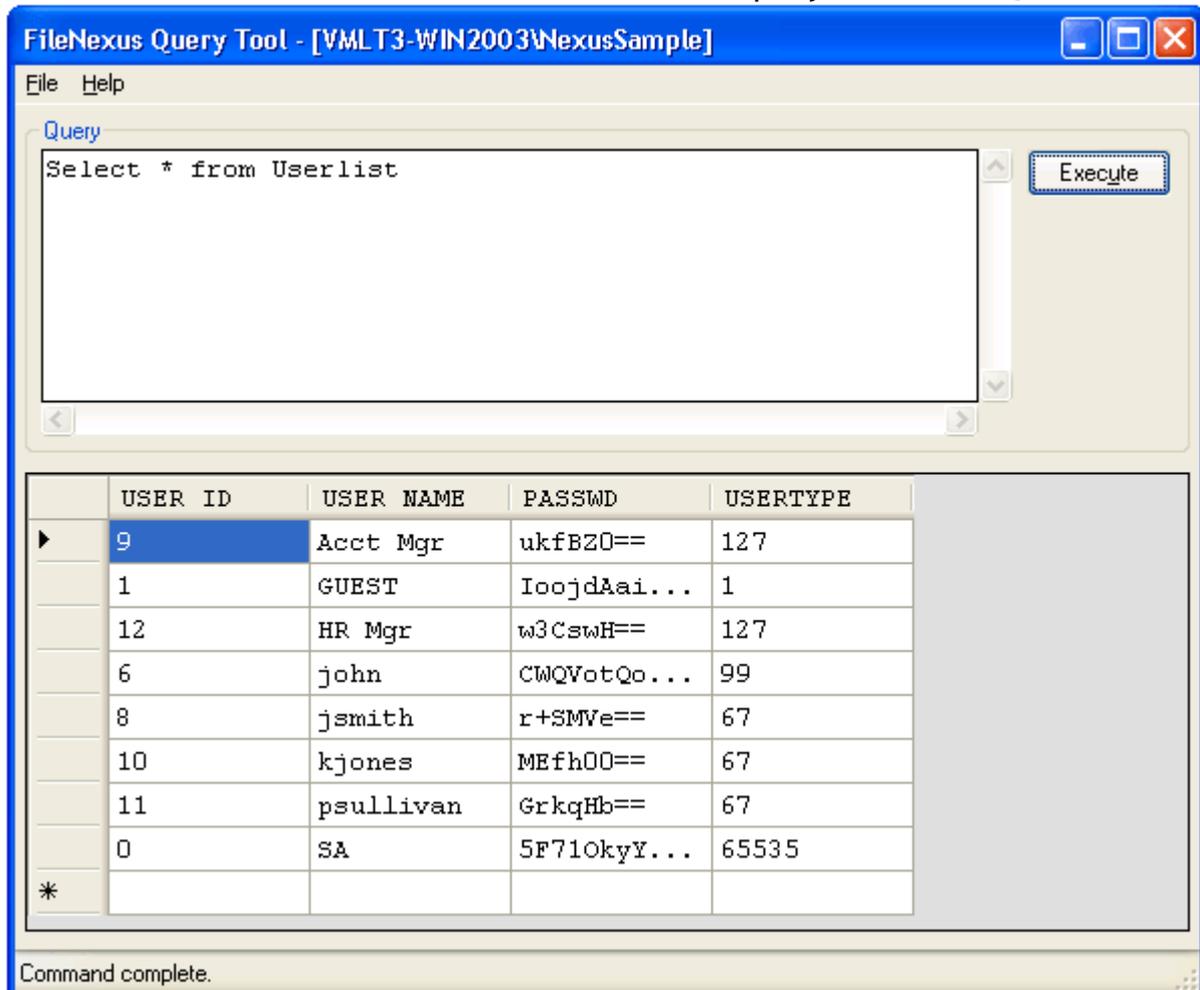


# FileNexus Query Tool

To access the query tool, click on **FileNexus Query Tool** on the **Advanced Tools** tab.



In the **Query** window, enter an SQL Query and hit **Execute**. Do NOT issue any Update/Delete commands in this tool as it may adversely affect the FileNexus System. This tool should be reserved for advanced users to query FileNexus SQL Database.



## Data Capture Setup Overview

The **FileNexus Data Capture Setup** program is an easy to use tool for administrative users to create *Document Classes* for categorizing documents and *Data Capture Setup files* (.ini) that will be used by a FileNexus Capture service that will identify, burst, and index documents. Each *FileNexus Data Capture Setup file* created will indicate to FileNexus how to identify a document, extract index values on a document, and set the document's destination folder in FileNexus. This application also provides a FileNexus user the ability to enable *Pick-list Searches* in the FileNexus Client for one or more indexes in a Document Class.

FileNexus DataCapture Setup is also used to configure FileNexus Workflow events. VB scripts are used to execute business rules triggered by a data event or manually fired from selecting a workflow button.

### FileNexus Data Capture Setup files

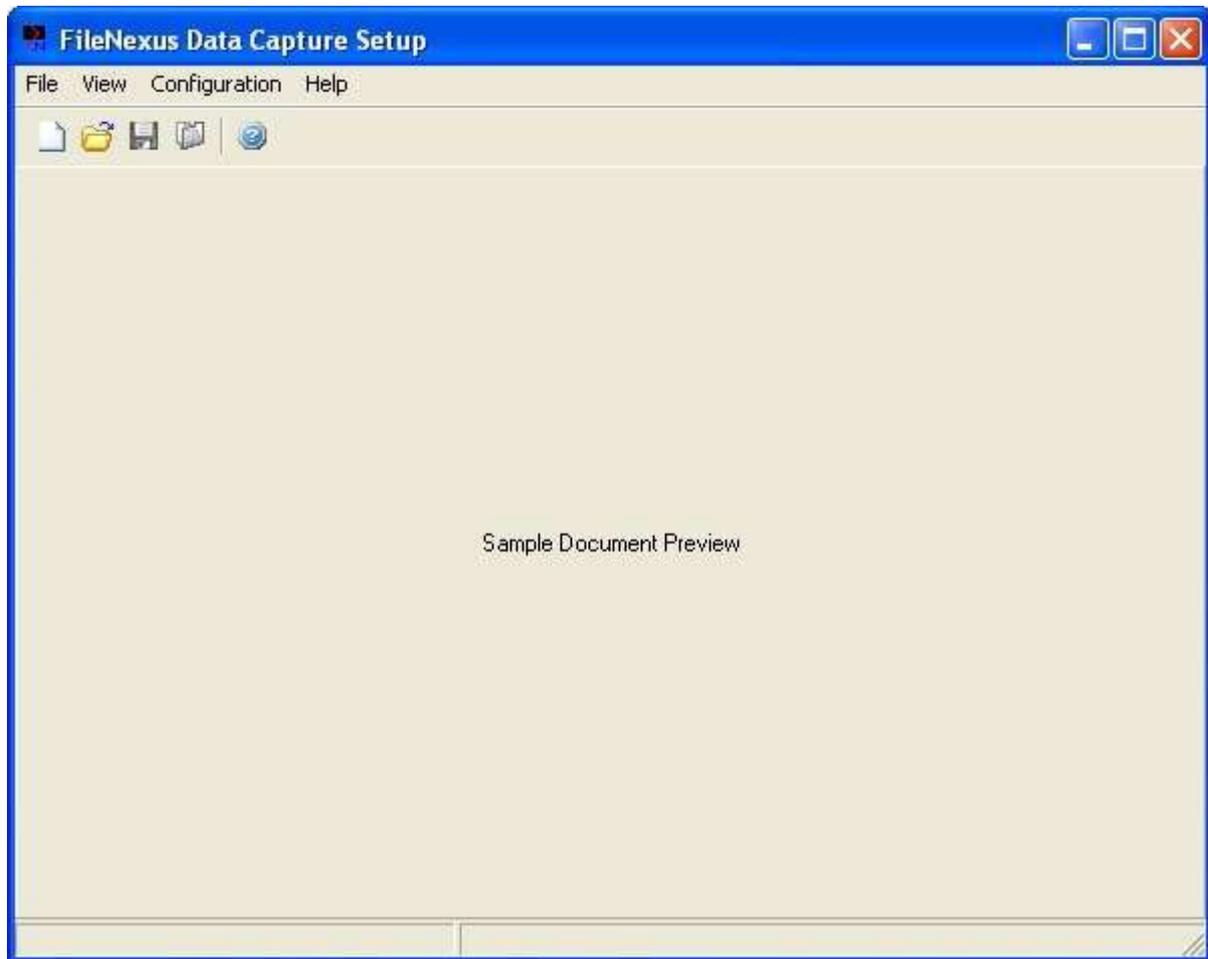
A FileNexus Data Capture Settings file (capture file for short) is an INI file (.ini) which contains information on how a capture service can identify and index a document sent to it. It contains information such as what page header(s) identifies a document as an Invoice, what index values to extract from a document and where, and how to burst a single file comprised of many documents into separate reports. A capture file may also contain advanced information used to update other documents stored in FileNexus or additional user defined variables on the document that may be used in a custom VB Script.

### Data Capture Services

There are five types of data FileNexus can automatically identify and index; Text, PDF, AFP, Image, and Email (.eml) documents. Each of the data types are processed through a FileNexus Capture Service which is managed through the [FileNexus Management](#) program.

## Getting Started

To launch the FileNexus Data Capture Setup program, go to Start → Programs → FileNexus → FileNexus Data Capture Setup. Then log into the FileNexus System with your FileNexus user name and password, and hit **OK**.



This will bring you to the FileNexus Data Capture Setup application window.

Sections	Description
<a href="#">Creating a Document Class</a>	Located under the <b>Configuration</b> menu, the <b>New Document Class</b> selection will display a dialog box used to create new document classes. This option is only available for FileNexus users with "Administration" rights.
<a href="#">New Data Capture File Dialog</a>	Selecting the <b>New</b> from the <b>File</b> menu will display a dialog box that allows you to define a new data capture settings file. (INI file) This option is used to define the data capture of Text, PDF, Image, or AFP documents.
<a href="#">Data Capture Options Dialog</a>	In the <b>Configuration</b> menu, the <b>Options...</b> selection pops up a system options dialog box for the FileNexus Data Capture Setup application.
<a href="#">Data Capture Setup Environment</a>	Once a <b>FileNexus Data Capture</b> file is loaded or a new one is created, setting and sample view is initialized and ready for use.

## Creating a Document Class

### Overview

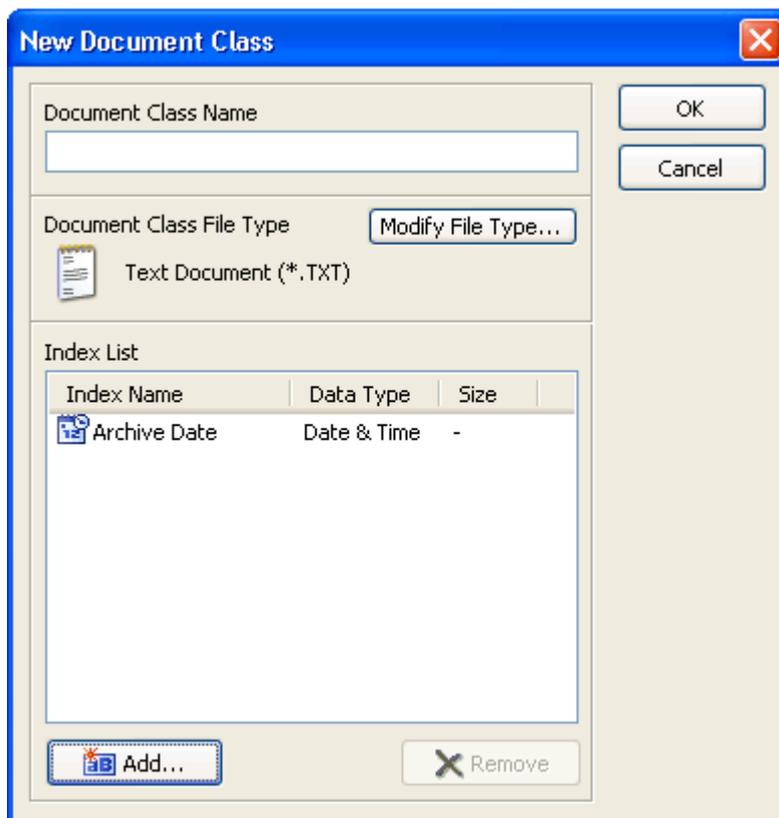
Before anything can be archived to the FileNexus system, a document class or classes must be defined to categorize documents entering the system. A **Document Class** describes a general type of document like "Invoice" or "Purchase Order" and contains indexes common to all documents of the class like "Invoice Number" or "PO Number". Before you can archive a new type of document to FileNexus, you must create a document class for the document type with the appropriate indexes and data types.

To create a new Document Class, go to the **Configuration** menu in the Data Capture Setup program and select **New Document Class** to open up the **New Document Class** dialog.

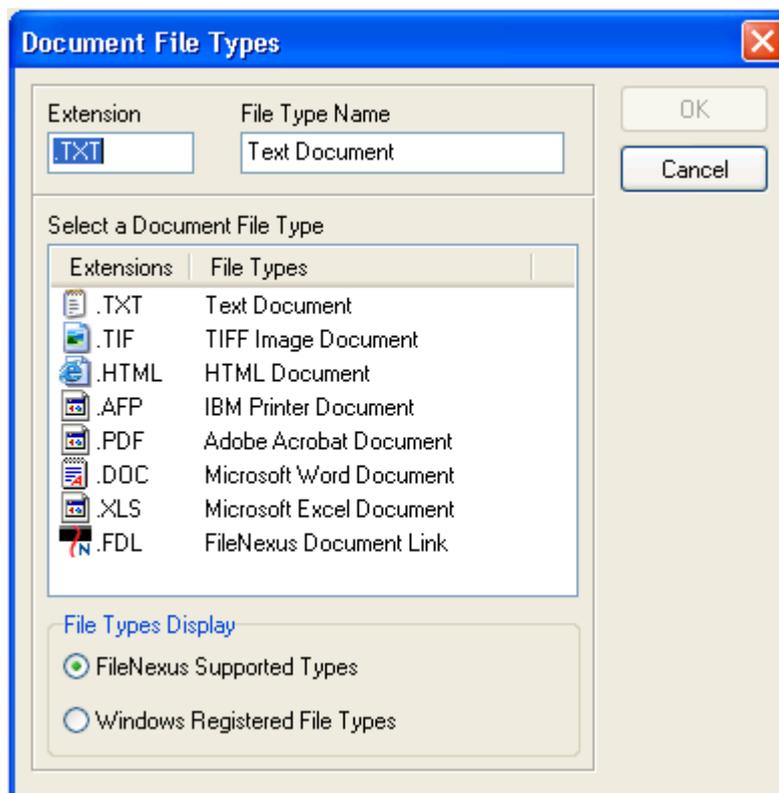


### New Document Class Dialog

The **New Document Class** dialog allows a FileNexus Administrator to create and define a new document class. This option is only available for FileNexus users with "Administration" rights.



In the **New Document Class** dialog, enter the name of the new document class. To select the type of files to be archived under a particular document class, click the **Modify File Type** button. The **Document File Types** window will appear. You must define what file types (or file extension) a particular **Document Class** will accept for archival.

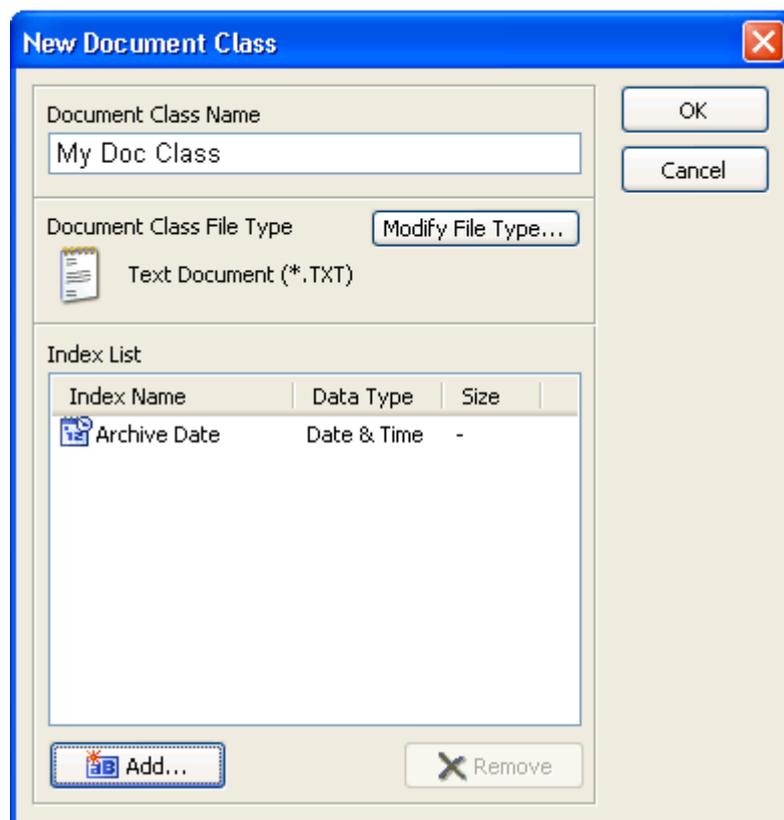


In the **Document File Types** dialog, highlight the appropriate file type, then select **OK**. If the file type you wish to select does not appear in the displayed list, click on the **Windows Registered File Types** radio button to display a complete list of Windows

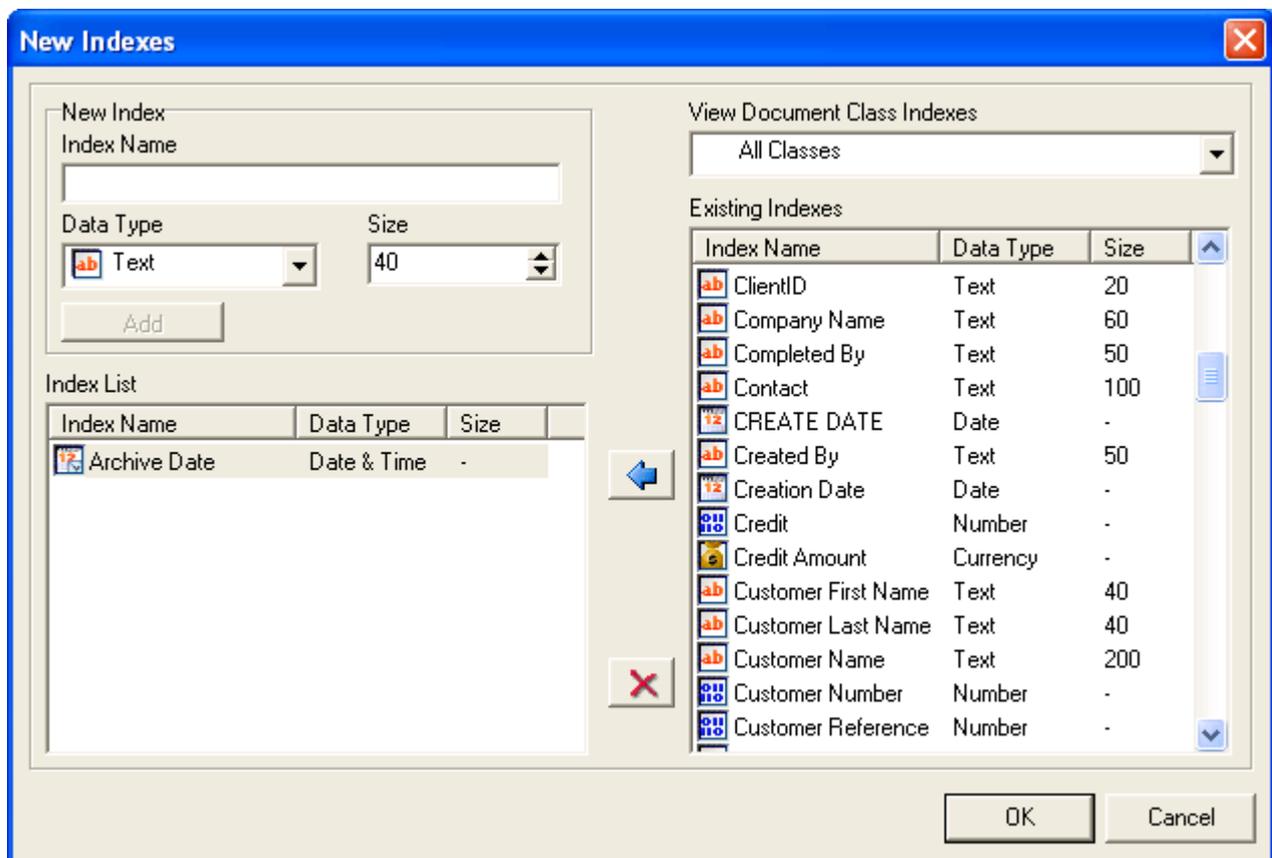
recognized file types. By changing the **Extension** and **File Type Name** edit fields, a user can select a file type not currently listed. Highlight your selection and click **OK** to proceed with creating a Document Class.

Section	Description
Extension	An edit field to enter the extension of a new file type which must have "." at the beginning of the extension name.
File Type Name	An edit field in which to enter the name of a new file-type.
Select a Document File Type	A list of document file-types from which to select.
File Types Display	Option allowing viewing of standard supported file types and all file types registered on the current Windows machine.

Next, you will need to create the indexes for the Document Class.



By default, all document classes will have **Archive Date** as an index. You must create at least one additional index in order to create a new Document Class (the minimum number of indexes per class being two). To add indexes to your Document Class, click on the **Add** button on the **New Document Class** window. This will make the **New Indexes** dialog appear.

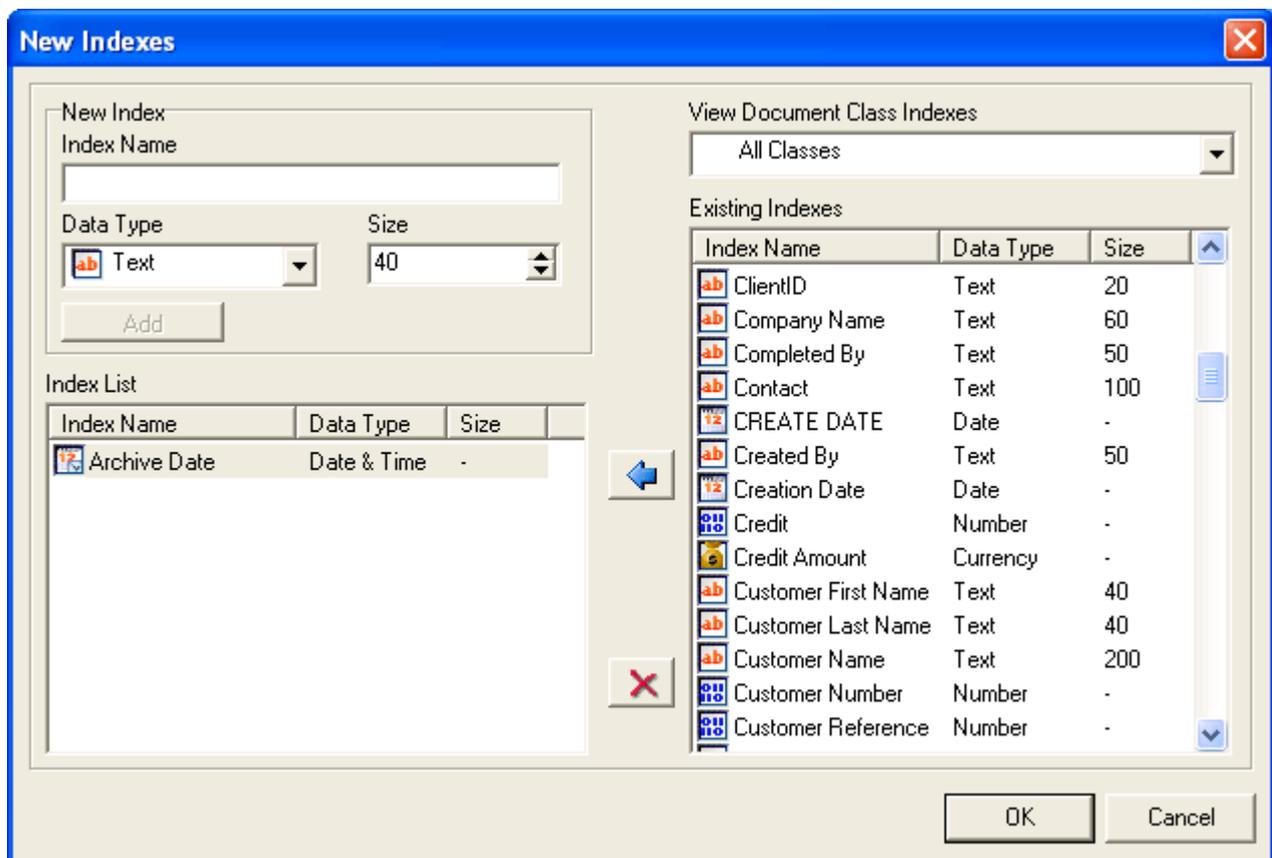


Adding Indexes to a Document Class

## Index Overview

An index describes a data field like "Invoice Number" or "Name" and holds a value that can be used to search for an archived document. Different Indexes may be comprised of different data types like Text, Date, Currency, Float, etc. The **New Indexes** dialog allows you to create new indexes or select existing indexes (from existing document classes) to add to a new Document Class.

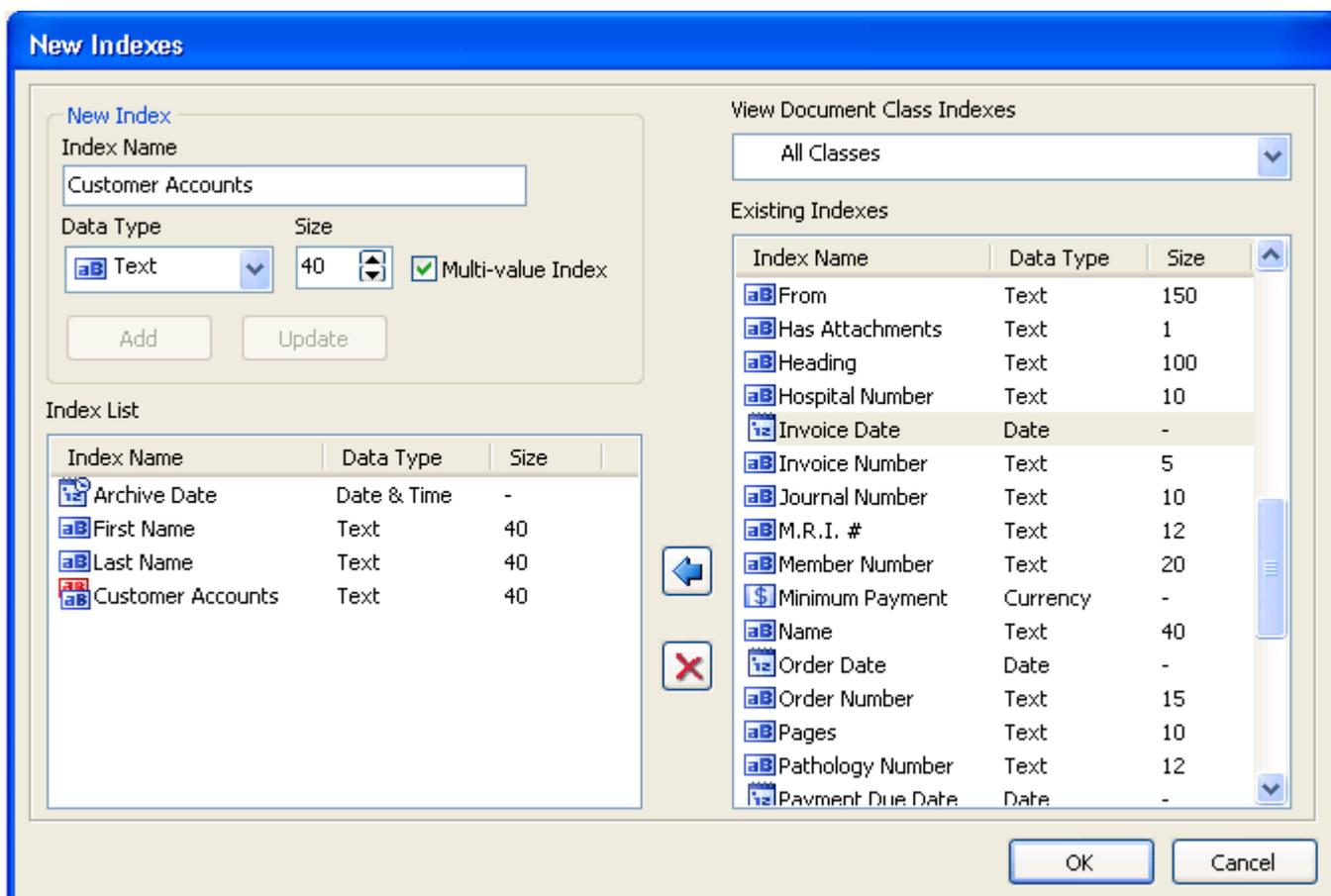
To add indexes to your Document Class, click on the **Add** button on the **New Document Class** window. This will make the **New Indexes** dialog appear.



### Adding or Creating an Index

To create a new index, enter the index name into the **Index Name** edit field. Next, select a data type from the **Data Type** drop down box. If your chosen data type is Text, enter the **Size** or maximum character length for the index and click **Add**. All indexes that will be created in the new Document Class will appear in the **Index List** box.

**NOTE:** Be sure to choose the appropriate **Data Type** for your index. For example, if you choose to make an “Account Number” index a **Number** data type, the index will never be able to accept any alpha characters. In addition, any leading zeroes that may normally appear in front of the Account Number will not be saved in FileNexus if the index is a **Number** data type.



If the index you are creating is a Text data type, you can elect to make the index a multi-value index by checking ON the **Multi-value index** checkbox before hitting **Add**. What this means is that the index will be able to store more than one searchable value. For example, you may create a Document Class for Statements that has an index called Customer Account. A customer statement may include information for more than one type or numbered account, so you may create a Customer Account index as a multi-value index on the Statements class. Only one multi-value index can exist on a single document class.

To add one or more existing indexes to the new Document Class, highlight the required index or indexes and then click the *Add Index* arrow button to move the index to the **Index List** box. Sometimes it is necessary to copy some or all indexes from another document class. You can limit or filter the indexes displayed in the **Existing Indexes** list box by selecting an existing document class from the **View Document Class Indexes** drop down box.

**NOTE:** If the selected class is missing an index, it may be because it already exists in the Index List display.

Section	Description
Index Name	An edit field to enter the name of the new index which may have a maximum of 32 characters and cannot contain invalid characters.
Data Type	Drop down list of index data types.
Size	Maximum character length (only valid for Text data type)
Add	The button that adds the new index to the Index List display.
Index List	Displays a list of new and selected indexes that will be used for a document class.
View Document Class Indexes	Drop down list of classes and an "All Classes" item to change the displayed indexes in Existing Indexes list view.
Existing Indexes	List of indexes that can be added to the Index List display.

	Clicking this button moves one or more indexes from the Existing Indexes list display to the Index List display.
	Pressing this button removes one or more indexes from the Index List display.
<input checked="" type="checkbox"/> Multi-value Index	Checking ON this checkbox for a new index allows the index to contain multiple Text values.

### FileNexus Data Types

Section	Description
 Text	Fixed-length non-Unicode character data must be a value from 1 through 255 character size.
 Number	Integer (whole number) data from $-2^{31}$ (-2,147,483,648) through $2^{31} - 1$ (2,147,483,647) with a storage size of 4 bytes.
 Float	Floating precision number data from $-1.79E + 308$ through $1.79E + 308$ with a storage size of 8 bytes.
 Time	Time data from 00:00:00.000 through 23:59.59.999, with an accuracy of three-hundredths of a second, or 3.33 milliseconds with a storage size of 8 bytes.
 Date	Date and time data from January 1, 1753, through December 31, 9999 with a storage size of 8 bytes.
 Date & Time	Date and time data from January 1, 1753, through December 31, 9999, with an accuracy of three-hundredths of a second, or 3.33 milliseconds with a storage size of 8 bytes.
 Currency	Monetary data values from $-2^{63}$ (-922,337,203,685,477.5808) through $2^{63} - 1$ (+922,337,203,685,477.5807), with accuracy to a ten-thousandth of a monetary unit with a storage size of 8 bytes.
	The icon that displays for a Text data type that is a FileNexus Multi-value index.

**NOTE:** The total storage bytes of all indexes for a particular class must not exceed 8000 bytes.

### Overview

Pick-lists allow users to select a search or input value from a pre-populated drop down menu or “pick-list”, and thereby help to eliminate incorrect data entry prior to archival of documents and incorrect search criteria entry when searching for archived documents.

There are two defined types of pick-lists in FileNexus; “Input” pick-lists and “search” pick-lists. Input pick-lists are set up for applications like the FileNexus Client Archiver and Image Indexer, where users may need to manually key in index data pertaining to a document. Search pick-lists are set up for documents that are already archived to FileNexus and allow users to select search criteria from a pre-populated drop down instead of keying in an index value.

The proceeding sections explain how to set up each type of pick-list.

### Input Pick-lists

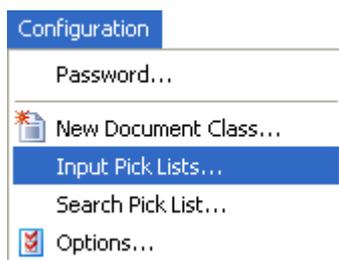
#### Setting Up an Input Pick-list

Input pick-lists can be used to help users with index data entry in the Image Indexer and Client Archiver.

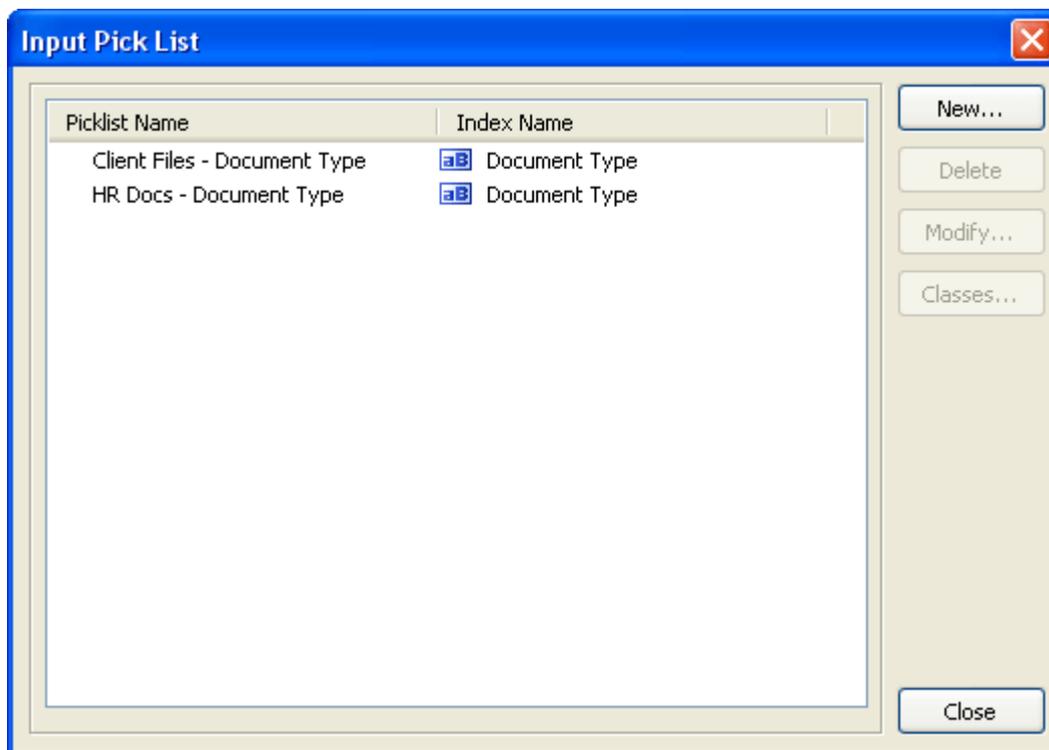
To set up an input pick-list, you must know the following:

1. The index for which the pick-list should be set up.
2. The name of the Document Class(es) for which the pick-list should apply.
3. The values that are to comprise the pick-list.

Once you have the above information, you may proceed to the *Configuration* menu in the *Data Capture Setup* program and select **Input Pick List**.



An *Input Pick List* dialogue will appear displaying any currently set up input pick-lists in the FileNexus system.



As you can see in the above example, there are two input pick-lists already set up for FileNexus; “Client Files - Document Type” and “HR Docs - Document Type”.

**NOTE:** In the above example, there are two input pick-lists set up for a “Document Type” index. This may occur if an index appears in more than one Document Class and the input values for one Document Class should be different than the input values for another Document Class. For Client Files, the document types may include Application, Credit Report, Direct Deposit Authorization, Monthly Statement, etc. Whereas the document types for HR Documents may include Annual Review, Contract, Employee Benefits, Resume, Timesheet, etc.

#### **New**

Click **New** to create a new input pick-list.

#### **Delete**

Highlight an input pick-list and click **Delete** to permanently delete it from the FileNexus System.

#### **Modify**

Highlight an input pick-list and click **Modify** to modify the values for the input pick-list.

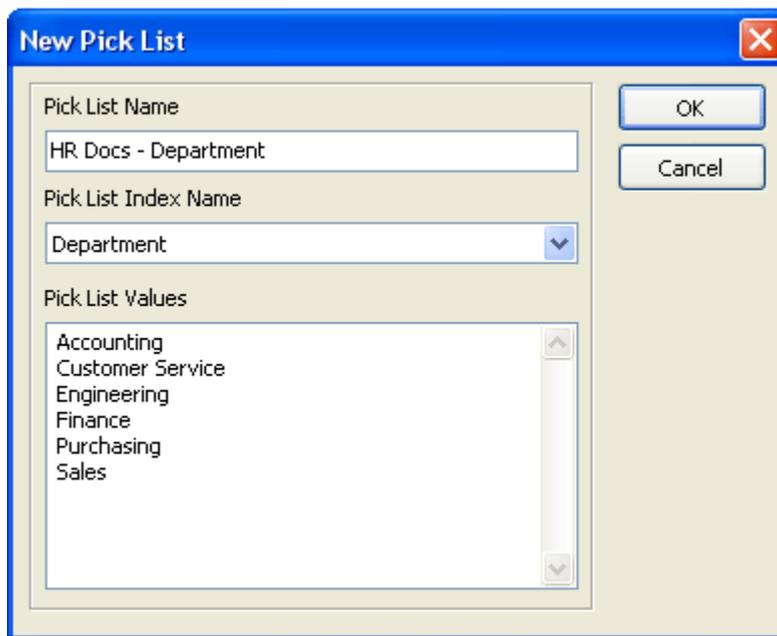
#### **Classes**

Highlight an input pick-list and click **Classes** to select the Document Classes for which the input pick-list should apply.

#### **Close**

Click **Close** when you are finished working in the Input Pick List dialogue.

To create a new input pick-list, click on the **New** button to open the *New Pick List* dialogue. Then enter the pick-list name, select an index, and input the values for the pick-list before hitting **OK**.



### Pick List Name

Enter a name for your input pick-list. This should be meaningful and reflect both the type of document (“HR Docs” for Human Resources documents in the above example) and the index the pick-list is being set up for (the “Department” index in the above example). There is no specific naming convention, but make sure to name your input pick-lists in a way that a FileNexus Administrator will easily recognize.

### Pick List Index Name

Select the index for which you wish to set up an input pick-list from the drop down provided. In our example, the Department index will be used for the input pick-list.

### Pick List Values

In this pane, enter a single value per line as you wish selections to appear in the input pick-list drop down to be employed by users. Be sure to confirm your spelling and that no extra spaces or carriage returns are entered before or after your values.

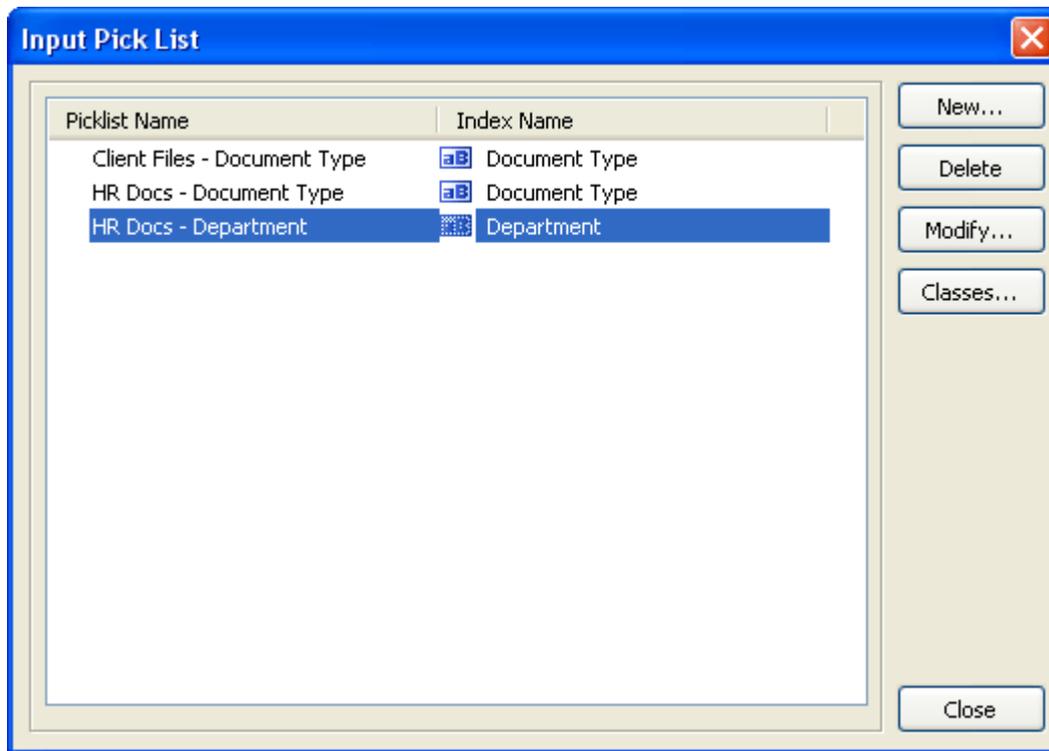
### OK

Click **OK** to save your changes.

### Cancel

Click **Cancel** to ignore your changes.

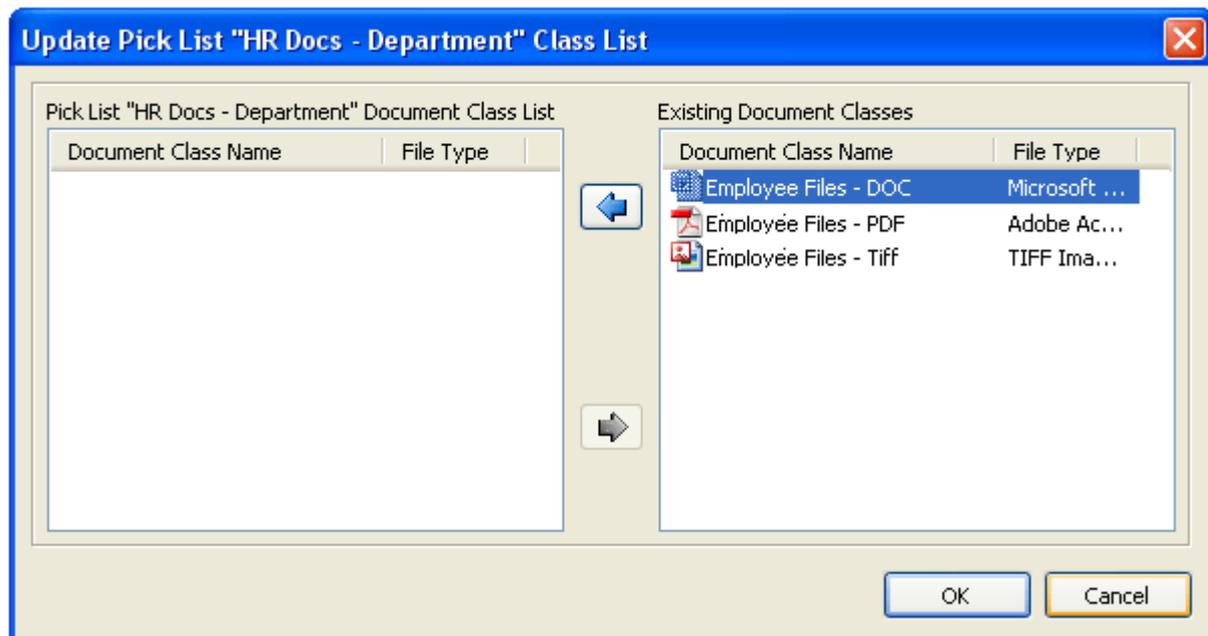
Once you have created your input pick-list and hit **OK**, you will be returned to the *Input Pick List* dialogue. Your next step will be to highlight the pick-list you just created and click on the **Classes** button to select one or more Document Classes for which the input pick-list should apply.



### Adding Classes to an Input Pick-list

To have an input pick-list apply to one or more Document Classes, select the pick-list in the *Input Pick List* dialogue and click **Classes**.

In the *Update Pick List* dialogue, highlight one or more Document Classes in the *Existing Document Classes* pane and click on the left-pointing arrow to “add” them to the “HR Docs - Department” input pick-list. Click **OK** to save your changes or **Cancel** to exit without saving.



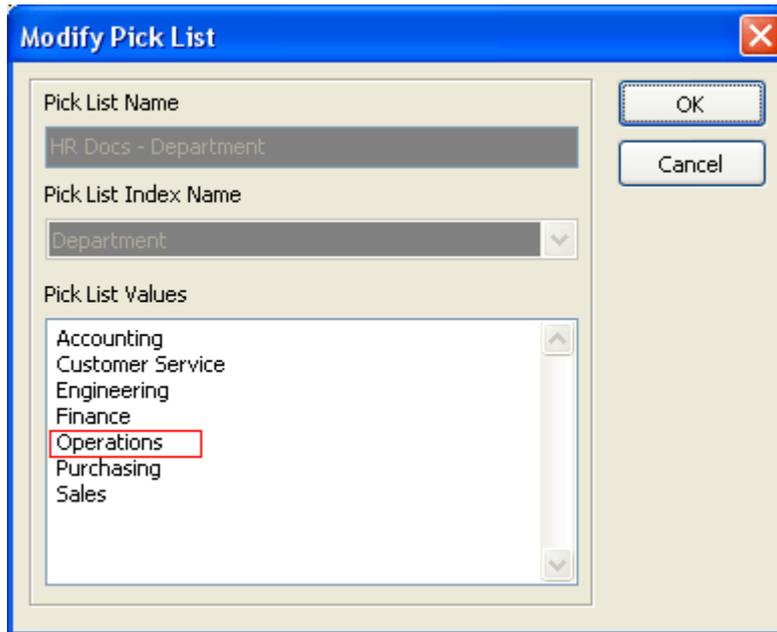
Your input pick-list is now ready to be employed by FileNexus users of the Client Archiver and/or the Image Indexer.

NOTE: For new Input Pick-lists to take effect for users, users may have to log out and log back into the FileNexus application being used to enter index values and archive new documents.

### Modifying an Input Pick-list

To modify the values in an input pick-list, select the pick-list in the *Input Pick List* dialogue and click **Modify**.

In the resulting *Modify Pick List* dialogue, make any changes or additions necessary to the *Pick List Values* and click **OK**. In the below example, we've added "Operations" to the list of departments.

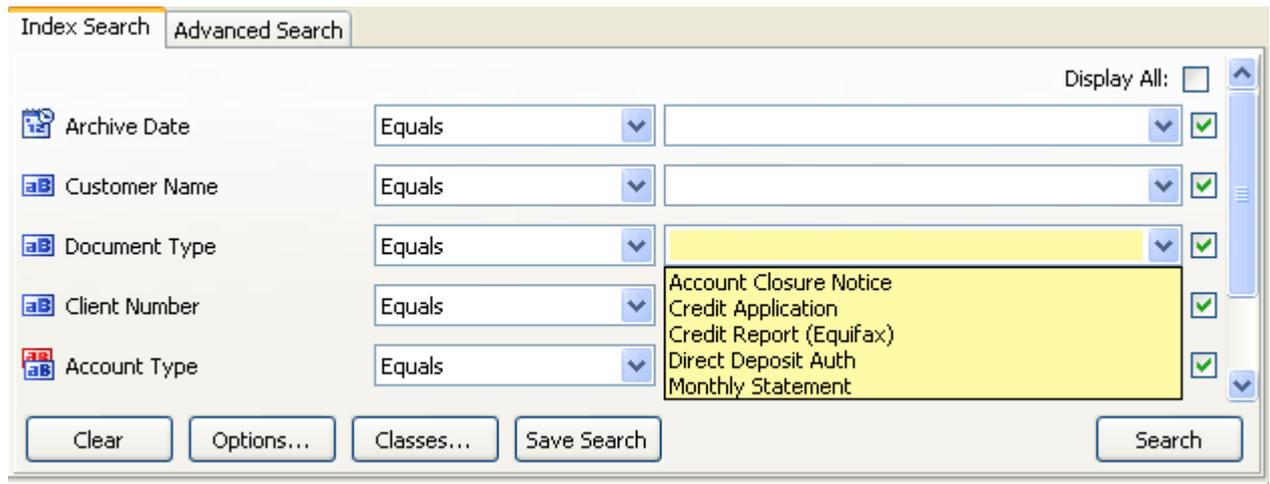


NOTE: For changes to existing Input Pick-lists to take effect for users, users may have to log out and log back into the FileNexus application being used to enter index values and archive new documents.

## Setting Up a Search Pick-list

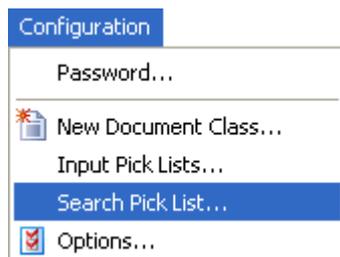
Search Pick-list can be used in the FileNexus Client and FileNexus Web Client, although setting up a pick-list for the Web Client involves a different process that is outlined in the section, [Setting Up Web Client Pick-lists](#).

Search pick-lists can be used to help users search for documents in the FileNexus Client by allowing them to select from valid index values in a pre-populated drop down in the Index Search pane. In the example below, a Search Pick-list has been set up or “enabled” for the *Document Type* index.

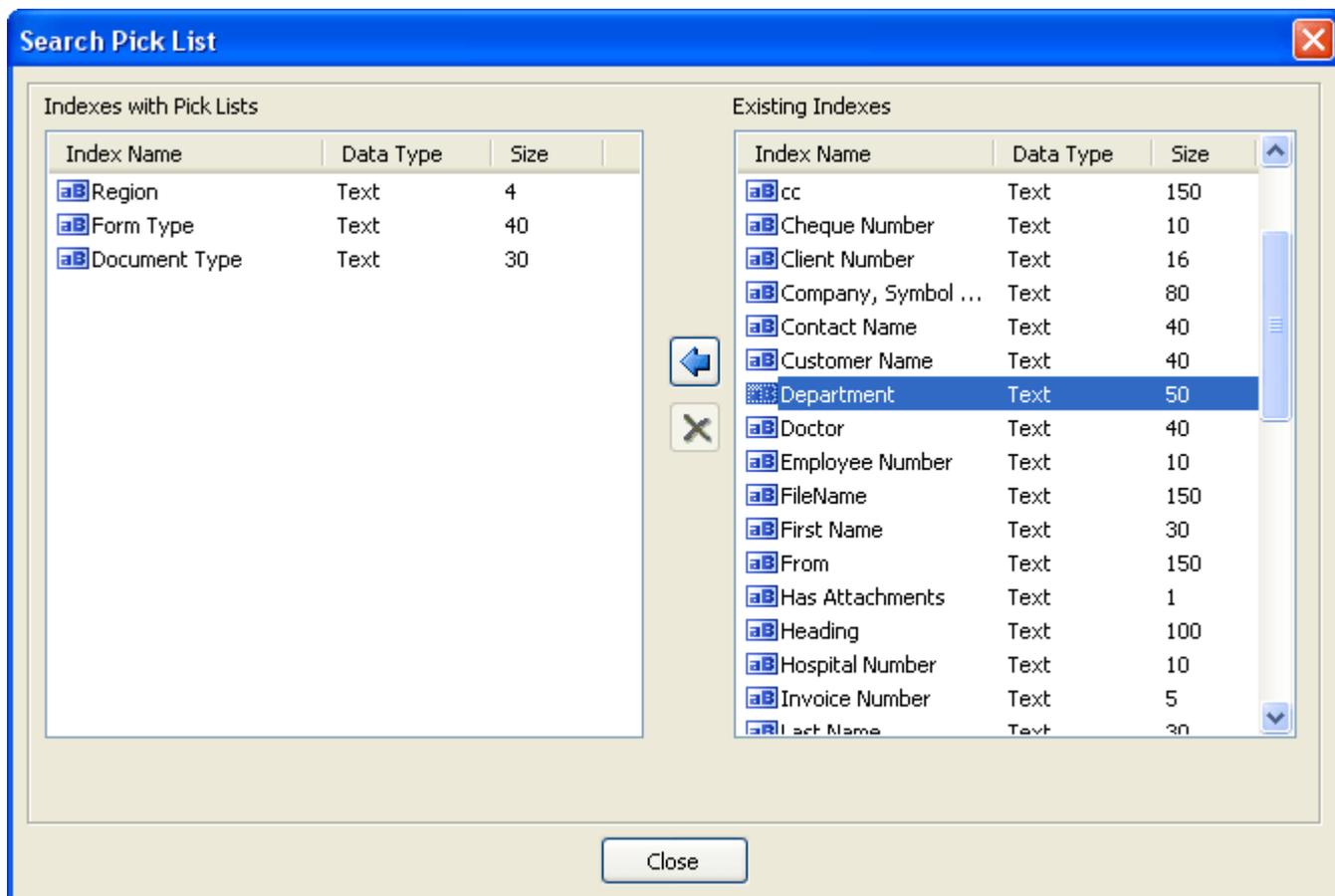


To set up a search pick-list, you must know the following the exact name of index for which the pick-list should be set up.

You may proceed to the *Configuration* menu in the *Data Capture Setup* program and select **Search Pick List**.



A *Search Pick List* dialogue will appear displaying any currently enabled search pick-lists in the FileNexus system as well as provide the ability to set up further search pick-lists.



To enable or set up a search pick-list, simply highlight the index for which the pick-list should be applied and click on the left-pointing blue arrow to add it to the *Indexes with Pick Lists* pane. Then hit **Close** to save your changes.

Unlike with input pick-lists, there is no need to enter values for a Search Pick-list as FileNexus will use all a unique list of values for the index on archived documents based on the Folder(s) and Document Class(es) being searched to auto-populate the pick-list drop down. By simply “enabling” a search pick-list for an index, FileNexus will automatically take care of the rest.

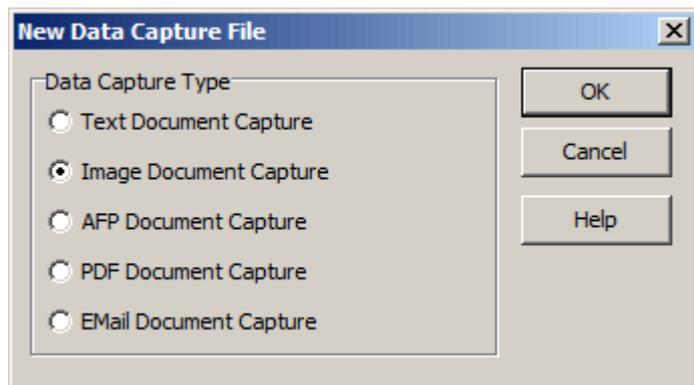
However, for a new search pick-list to take effect and be visible to users, they may need to log out and log back into the FileNexus Client.

**NOTE:** Search Pick-lists should only be set up for indexes which will continue to have limited and small number of possible index values. Indexes like Form Type, Account Type, Sex, Document Type, Department, etc. may be good candidates for search pick-lists. Indexes like Account Number, Customer Name, Subject, and Description should NOT be set up for search pick-lists.

## Creating a Data Capture Settings File

Selecting **New** from the **File** menu in the Data Capture Setup program will display a dialog box that allows you to define a new data capture settings file (INI file). This option is used to define the automatic data capture of Text, Image, AFP, PDF, or Email documents.

The **New Data Capture File** dialog box allows the user to first select the type of data capture file before continuing with the selection of the Document Class and Destination folder in the FileNexus Client.

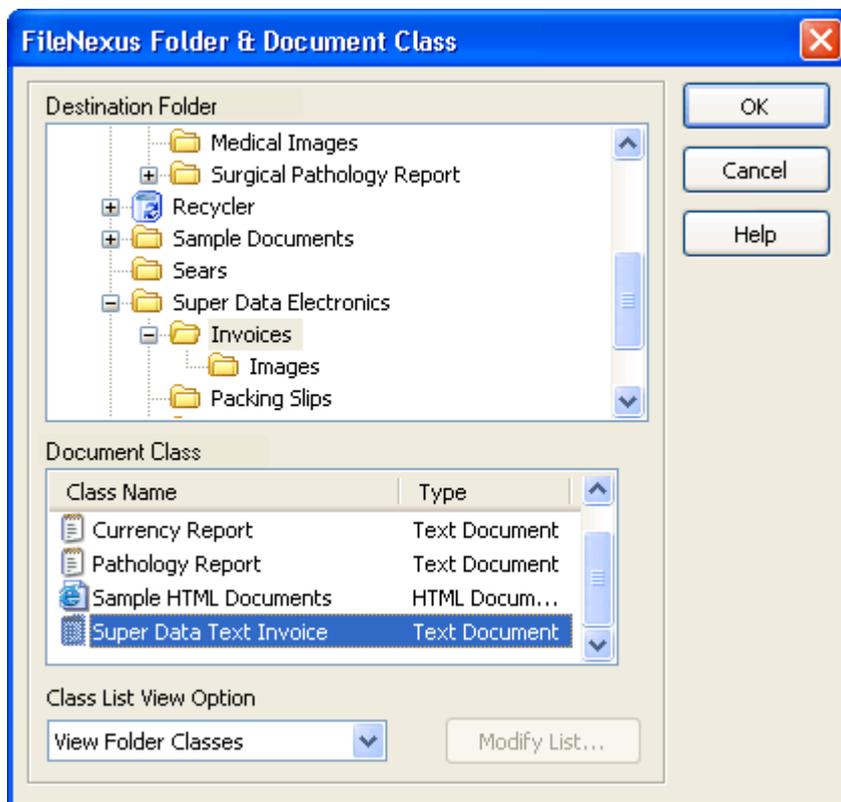


### Creating a Capture Settings File

Once a selection is made as to the type of capture file to create, the **FileNexus Folder & Document Class** dialog will be displayed.

The **FileNexus Folder & Document Class** dialog box allows a user to select a destination folder for documents to be archived and their document class. It also allows the user to create, delete, rename, and move a folder as well as customize the view of document classes provided he/she has the appropriate FileNexus Access Rights.

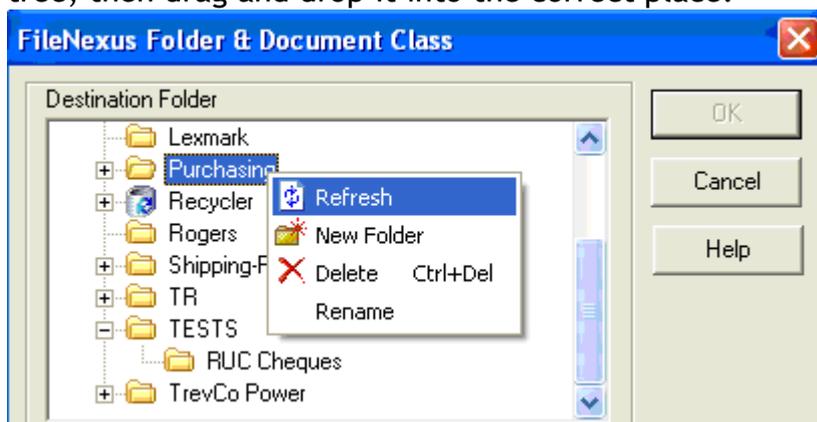
**NOTE:** A document class will not be visible if all previously archived documents of that class have been moved to the **Recycler** folder. Also, if the user does not have access rights to a folder, it will not be displayed.



Only supported document classes will be displayed to the user in the *Document Class* list box. For example, if you chose **Text Document Capture** in the New Data Capture File dialog, only Text document classes will be displayed for selection.

### Selecting a Folder and a Document Class

Always first select or create a folder before selecting a document class. To create a folder, you can right-click on the parent folder of the new folder and select **New Folder** from the context menu. If the folder does not appear in the correct branch of the folder tree, then drag and drop it into the correct place.



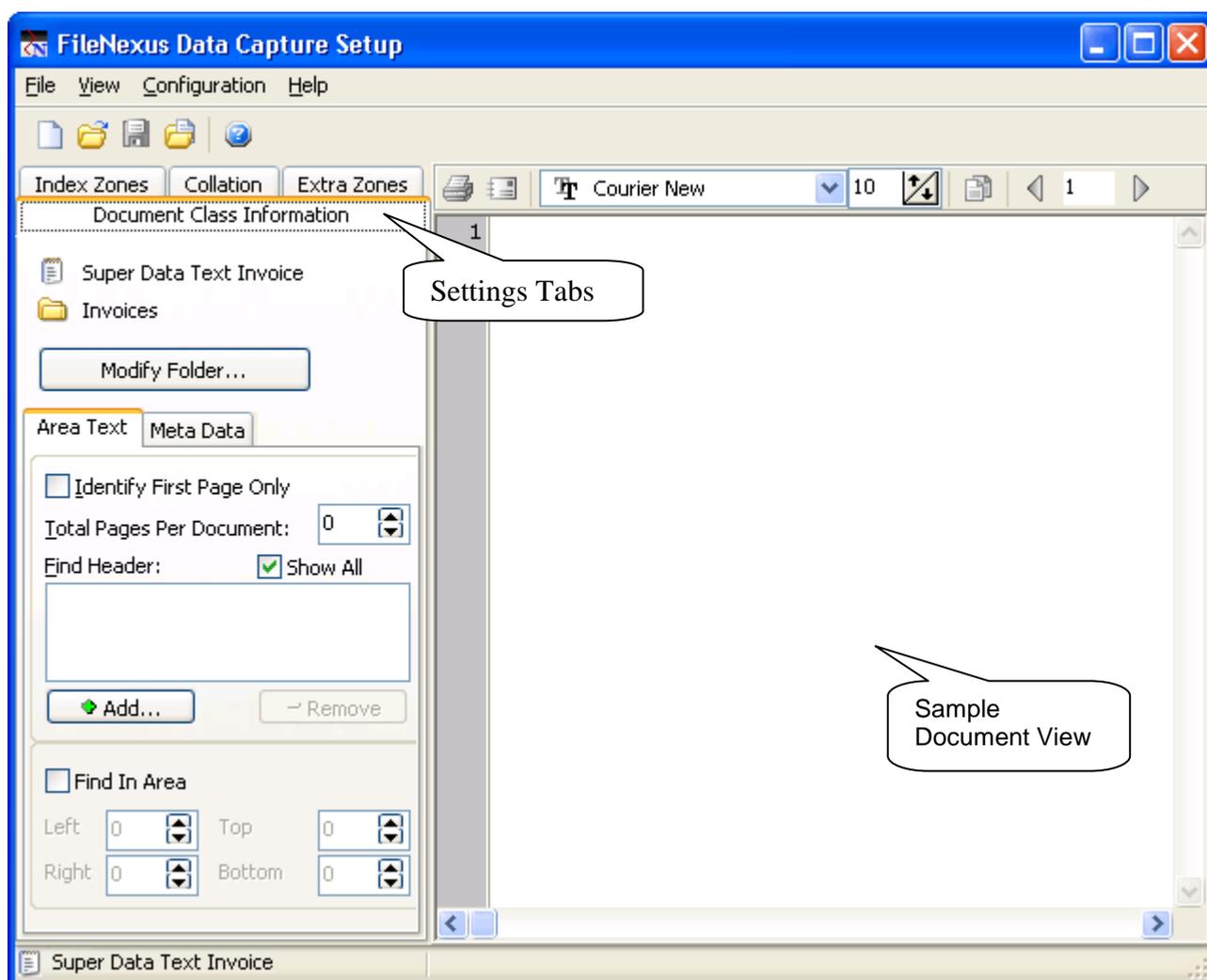
Once a folder is selected you should select the document class. If the **Class List View Option** drop down box displays "View Folder Classes" it is possible that no classes will be visible if the folder is new or empty. Selecting "View All Document Classes" will display all available classes in the **Document Class** list. If classes have similar names, it may be necessary to view the [Document Properties](#) by selecting the class then right-clicking it and selecting **Properties**. In some cases there may be many classes to view and each time the dialog is displayed, it takes a while to load. Selecting "View Custom Class List" will display only the classes selected from the Create [Custom Class List](#) dialog box which

is displayed when *Modify List* is clicked. If a custom list has already been created, the **Document Class** list will display it each time.

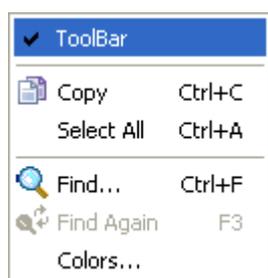
<b>Section</b>	<b>Description</b>
Destination Folder	Folder tree of all FileNexus folders the connected user has access to.
Document Class	List view display of document classes to select.
Class List View Option	Drop down box containing "View Folder Classes", "View All Document Classes" and "View Custom Class List" options.
Modify List	Enabled only if "View Custom Class List" option is selected and displays the <a href="#">Create Custom Class List</a> dialog box.
<b>Context Menu Items</b>	<b>Description</b>
Refresh Menu	Refreshes the <i>Destination Folder</i> tree view.
New Folder	Creates a new sub folder inside a folder.
Delete	Deletes an empty folder.
Rename	Sets the folder tree to edit mode to allow modification of a folder name.
Properties	Displays the <a href="#">Document Class Properties</a> dialog box.

After selecting a FileNexus folder and document class, the FileNexus Data capture environment will be initialized and ready for you to proceed.

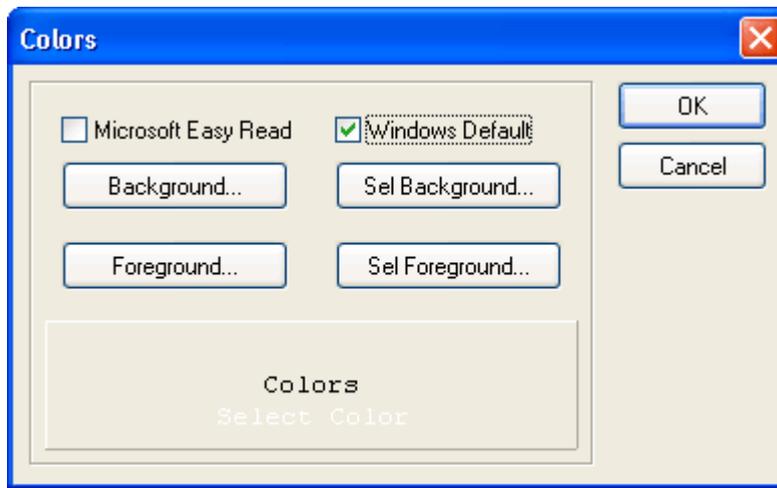
## Initialized Data Capture Setup Environment



To change the background colour of the Sample Document View pane, you can right-click on the pane to open the context menu and select **Colors**.



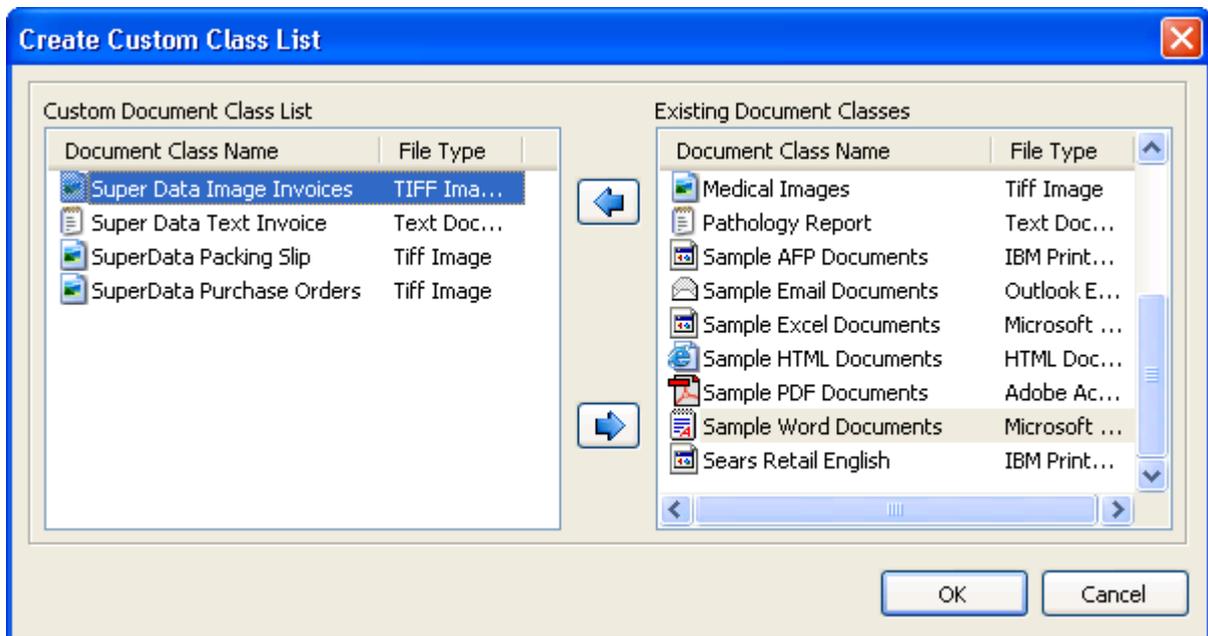
In the Colors window, select **Windows Default** if you want to view sample documents with a white background and black font. Otherwise, you may choose your desired background and foreground (font colour) by clicking on the **Background** or **Foreground** buttons. To change the background and foreground colours of sections you highlight or select on a sample document, click on the **Sel Background** or **Sel Foreground** buttons.



FileNexus will remember your preferences the next time you login to the Data Capture Setup program.

## Overview

The **Create Custom Class List** dialog is used to build a customized list of classes for end user choices.



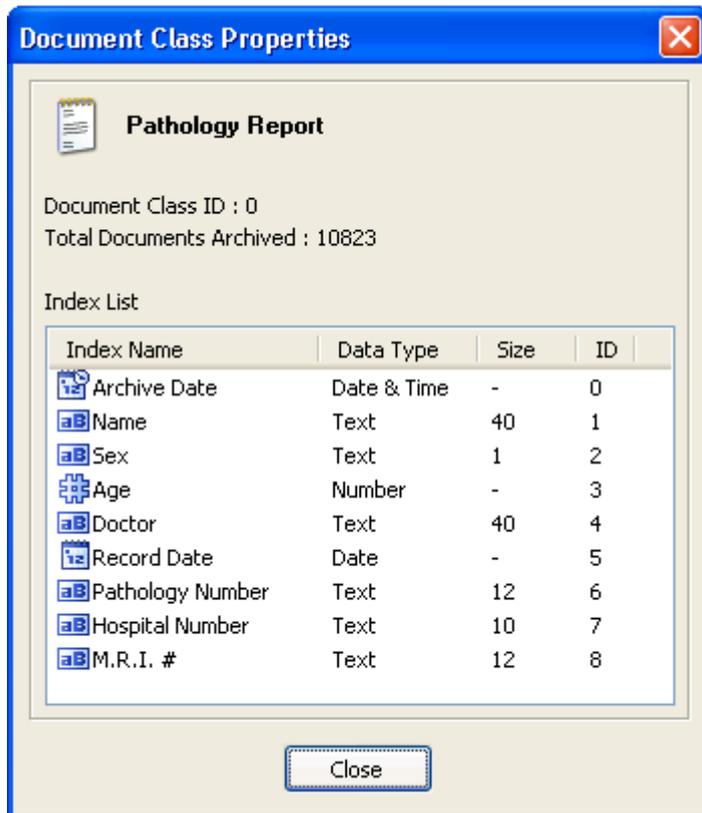
### Creating a Custom Document Class List

A custom list of document classes can be created by selecting one or more (Hold down the Shift or CTRL key to select more than one) document classes from the *Existing Document Classes* list display then pressing the *Add to Custom List* button. If one or more classes need to be removed from the *Custom Document Class List*, select the classes then click the *Remove from Custom List* button. In some cases, similar named classes may cause confusion as to which class to select. To find out more information about a class, right-click the class and select the Properties menu item to display the *Document Class Properties* dialog.

Section	Description
Custom Document Class List	List view display of the custom classes that will be used in a custom list.
Existing Document Classes	List view of all available classes.
 Add To Custom List	A button that moves one or more document classes selected in the <i>Existing Document Classes</i> display to the <i>Custom Document Class List</i> .
 Remove from Custom List	Click the button to move one or more document classes from the <i>Custom Document Class List</i> to the <i>Existing Document Classes</i> display.
<b>Context Menu Items</b>	<b>Description</b>
Properties	Displays the <a href="#">Document Class Properties</a> dialog box.

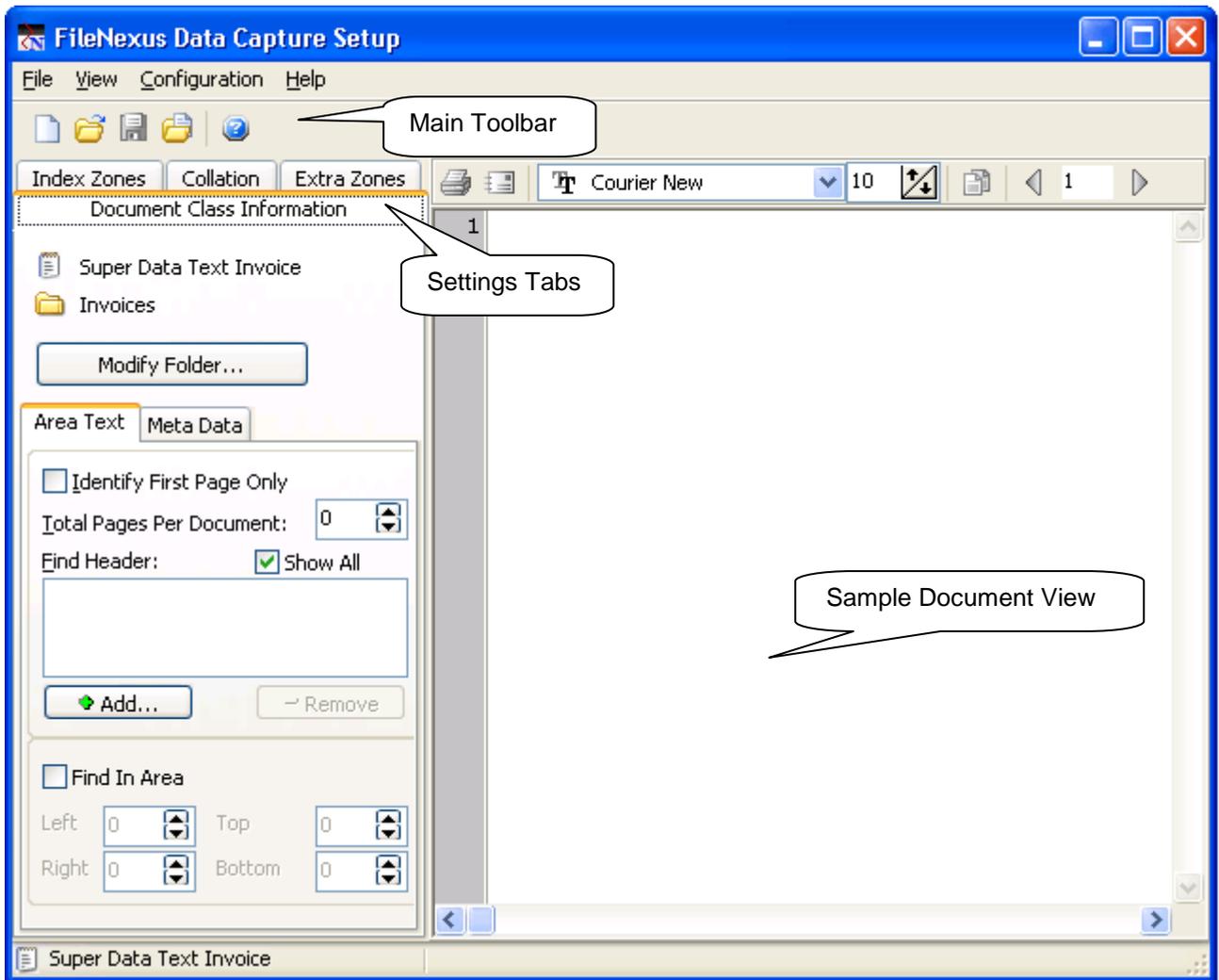
## Document Properties Dialog

The **Document Class Properties** dialog displays information about a document class. This information can be helpful to an end user when similar named classes can only be distinguished by the class ID or the indexes that belong to the class. This display provides detailed information about the document class and its indexes.



## Overview

The FileNexus Data Capture Setup application is split into two parts once a FileNexus Capture Settings File (or .ini file) is loaded or a new Capture Setup File is being created. The two parts are the **Settings Tabs** and the **Sample Document Pane**. These two sections are used to setup up or view how a document will be identified, indexed and/or used to update documents already stored in FileNexus.



## Environment Sections

### Main Menu

Each menu item provides options to control different aspects of the application.

File	Loading, saving, login, and exiting the application.
View	Showing/hiding the main toolbar and status bar.
Configuration	Creating document classes, creating/editing Pick-lists, and setting capture setup file options.
Help	FileNexus application help options.

## Main Toolbar

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

 New	Displays <a href="#">New Data Capture File</a> dialog to create a new Setting Capture file.
 Open	Displays a dialog to select a FileNexus Capture Setting File.
 Save	Saves the current FileNexus Capture Setting File.
 Open Sample	Displays a dialog to select a sample document.
 Help	Displays the FileNexus Data Capture Setup help file.

## Settings Tabs

The tabs provide quick access to setting used to identify, index, and update documents. Each tab provided may display the location of data that is used in processing a document.

<a href="#">Document Class Information</a>	Information on how to identify a particular document, what document class it will belong to, and its destination folder in the FileNexus Client.
<a href="#">Index Zones</a>	Document zone mapping to capture index values for an identified document
<a href="#">Collation</a>	List of document classes to update with index values captured from the identified document.
<a href="#">Extra Zones</a>	Location of additional values used for post processing.

## Status Bar

The status bar provides quick visual reference of the document class and information about the sample document view.

## Sample View Toolbar

The Sample View Toolbar is separate from the main toolbar and each button controls different aspects of the sample document view.

## Sample Document View

The [Sample Document View](#) represents a large portion of the applications real estate and is the area where a sample document will be displayed. A sample document is used to aid in finding data that will be used to identify or index a document.

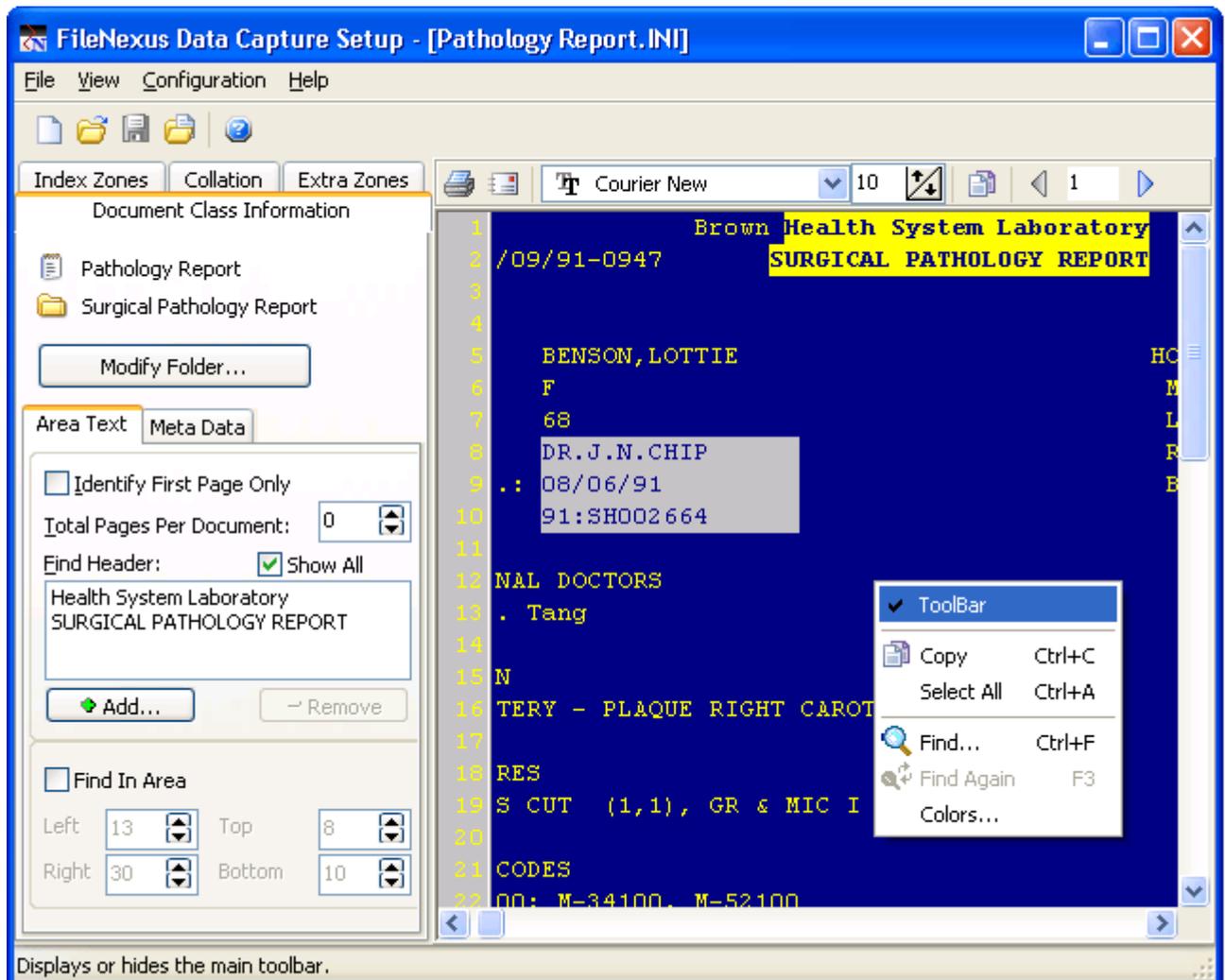
## Sample Document Views

There are five viewing modes that load different types of sample documents, Text, Tiff Image files, PDF documents, AFP files, and Email documents (will be documented in an Email Module manual). Once loaded, the location of text information for indexes and header information can easily be found.

<a href="#">Text Sample Document View</a>	Views text files from many different sources.
<a href="#">Image Sample Document View</a>	Only TIFF images created by a multi-function device or image scanner may contain barcode values that can be extracted.
<a href="#">PDF Sample Document View</a>	Displays only the text found in the PDF document.
<a href="#">AFP Sample Document View</a>	Displays only the text found in the AFP document.
Email Sample Document View	Please see the section <a href="#">Creating an Email Capture Setup File</a>

## Overview

The Text sample maintains and displays a small sample of text data one page at a time for fast and easy viewing analysis. The view provides many features to aid in selection, navigation and locating index data throughout the data sample. Each header or key word found is brightly highlighted for quick reference. Features like block selection and cursor beyond end of line provide easy access to data zones like addresses and names. Also, gutter line numbers and status bar information provide a quick view of where text is located on a page.



### Loading a Sample Document

Before opening a sample text document, you can modify the *Filter Settings* found in the [Data Capture Options](#) dialog by selecting **Options** in the **Configuration** menu. To open a sample document, click the **Open Sample** button  from the main toolbar or the menu item under **File**. An open dialog box will be displayed allowing the selection of a text file.

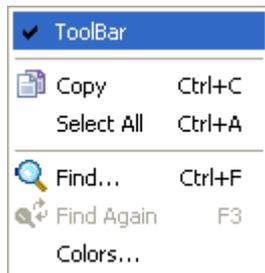
**NOTE:** The text file will be opened in a read only mode so no changes are possible to the original document. Also, because this is only a sample of the document only a preset number of pages (which can be modified in the *Filter Settings*) will be loaded.

### Text Sample View Toolbar

Print	Displays the Print dialog box to print the sample text file.
Send	Emails the sample document.
Courier New Font Drop Down Box	Changes the font for viewing and printing text in the FileNexus Data Capture Setup program.
10 Font Size	Changes the font size for viewing and printing text in the FileNexus Data Capture Setup program.
Copy	Copies the selected area to the windows clipboard.
Previous Page	Displays the previous page of the active text sample.
1 <input type="text"/> Page Number	An edit box that displays the active page and can be modified to move to a particular page.
Next Page	Displays the next page of the active text sample.

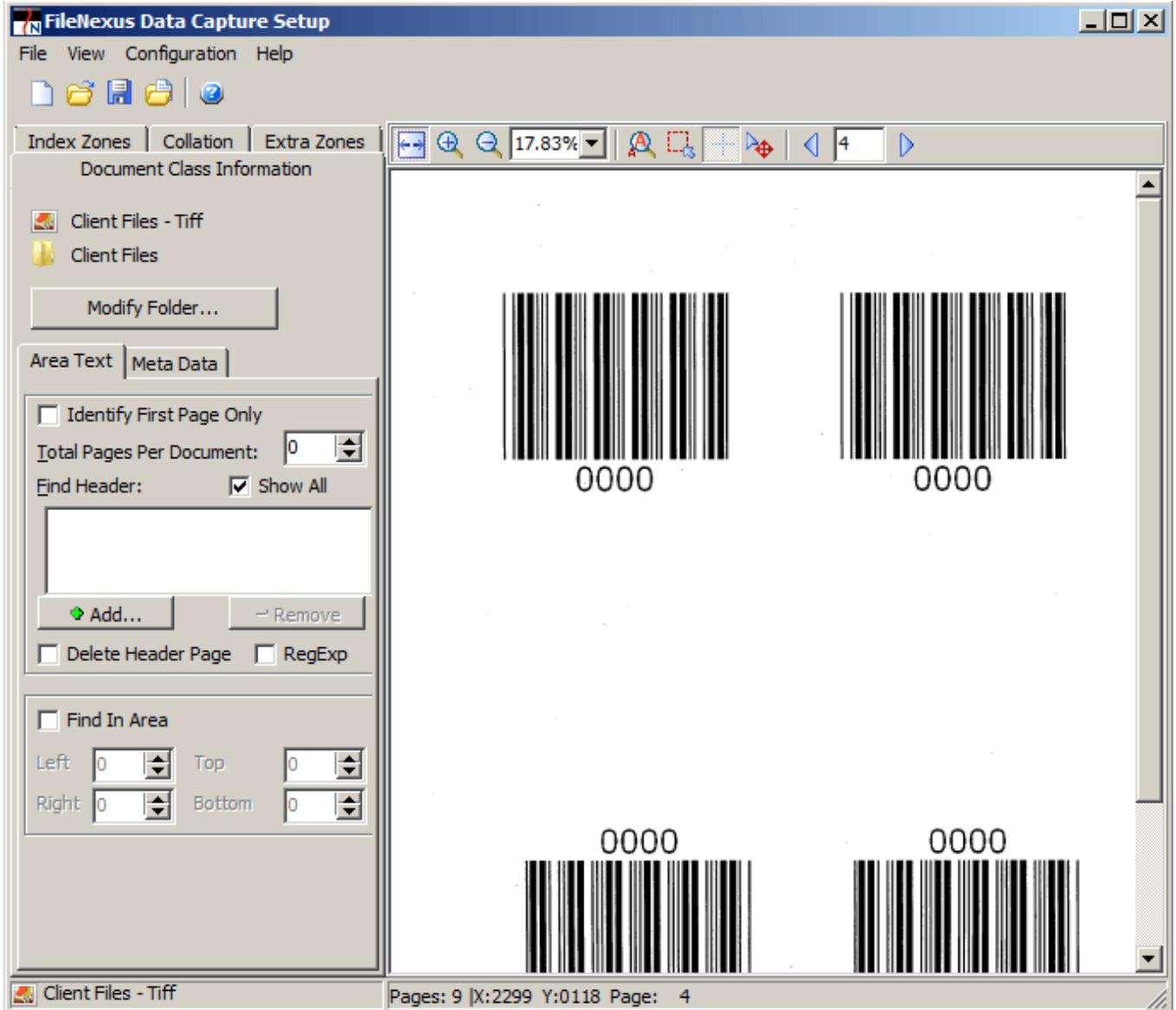
### Context Menu

Toolbar	Check button menu item that hides or displays the Text Sample toolbar.
Copy	Copies the selected area to the windows clipboard.
Select All	Selects all text on the current page.
Find	Displays the Find dialog to search for specific text and highlights first occurrence in the sample view.
Find Again	Repeats the last search.
Colors	Displays the Colors dialog box to modify the text sample view's colors.



## Overview

The Image sample view maintains and displays a small sample of a TIFF file for fast and easy viewing analysis. The view provides many features to aid in selection, navigation and finding of data throughout the data sample.



### Loading a Sample Document

Choose the **Open Sample** button  from the main toolbar or select Open Sample from the **File** menu. An **Open** dialog box will be displayed allowing the selection of a TIFF file.

NOTE: Only TIFF images produced by a multi-function device or dedicated image scanner will contain usable barcode information (where appropriate) for indexing and identification. For information on appropriate Tiff settings (compression, resolution, etc) please contact Loris Technical Support at (416) 252-4701 ext. 230.

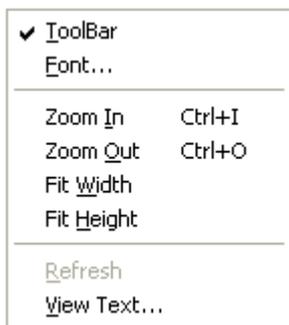
### Image Sample View Toolbar

 Follow Window	Check button to indicate if the image will resize when the main window's width has changed.
---	---

 Zoom In	Zooms in by 33% of the current zoom.
 Zoom Out	Zooms out by 33% of the current zoom.
84.48%  Zoom Percentage	Magnification percentage of the original image.
 Magnifying Glass	Magnifies a small section of an image.
 Zoom Select	Zooms on a selected area.
 Select Area	Highlights a selected area
 Pan	Pans the display if it can scroll.
 Previous Page	Displays the previous page.
1 <input type="text"/> Page Number	Indicates the current page number and can be modified to display a different page.
 Next Page	Displays the next page.

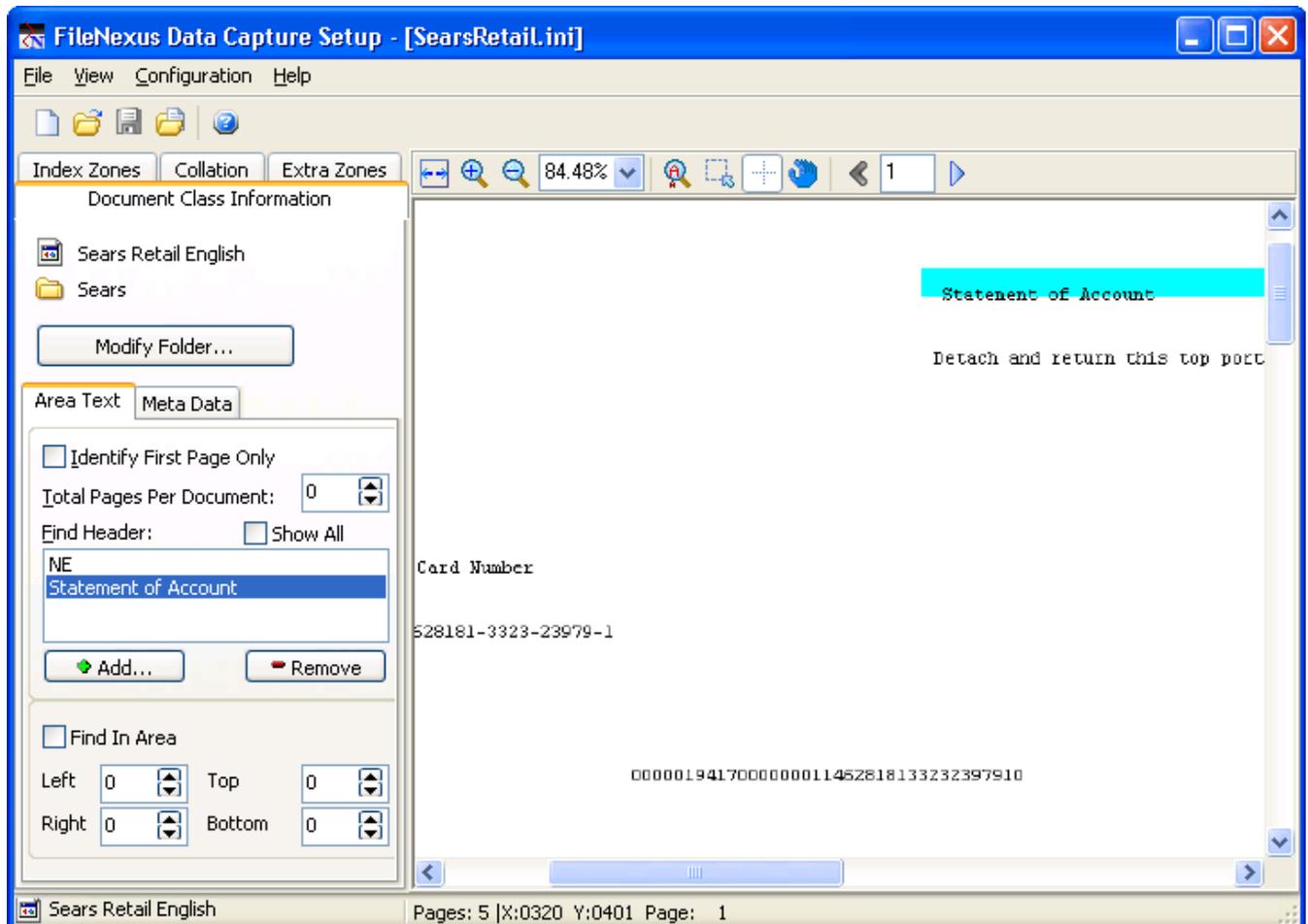
### Context Menu

Toolbar	Check button menu item that hides or displays the Text Sample toolbar.
Zoom In	Zooms in by 33% of the current zoom.
Zoom Out	Zooms out by 33% of the current zoom.
Fit Width	Fits the image to the width of the screen.
Fit Height	Fits the image to the height of the screen.
View Text	Displays in notepad all text and coordinates of the text in the displayed image.



## AFP Sample View

The AFP sample view maintains and displays a small sample of an AFP file for fast and easy viewing analysis. The view provides many features to aid in selection, navigation and finding of data throughout the data sample.



### Loading a Sample Document

Before opening a sample AFP document, modify the *AFP Font* and *AFP EndX* found in the [Data Capture Options](#) dialog by going to the **Configuration** menu and selecting **Options**. Select the **Open Sample** button  from the main toolbar or the menu item in the **File** menu. An Open dialog box will be displayed allowing the selection of an AFP file.

**NOTE:** Only text will be displayed once a sample AFP file is loaded. This is done to speed up the viewing and lower configuration issues.

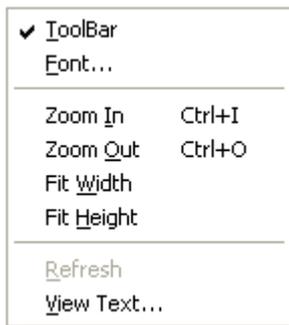
### AFP Sample View Toolbar

 Follow Window	Check button to indicate if the image will resize when the main windows width has changed.
 Zoom In	Zooms in by 33% of the current zoom.
 Zoom Out	Zooms out by 33% of the current zoom.
84.48%  Zoom Percentage	Magnification percentage of the original image.
 Magnifying Glass	Magnifies a small section of an image.
 Zoom Select	Zooms on a selected area.

 Select Area	Highlights a selected area
 Pan	Pans the display if it can scroll.
 Previous Page	Displays the previous page.
1 Page Number	Indicates the current page number and can be modified to display a different page.
 Next Page	Displays the next page.

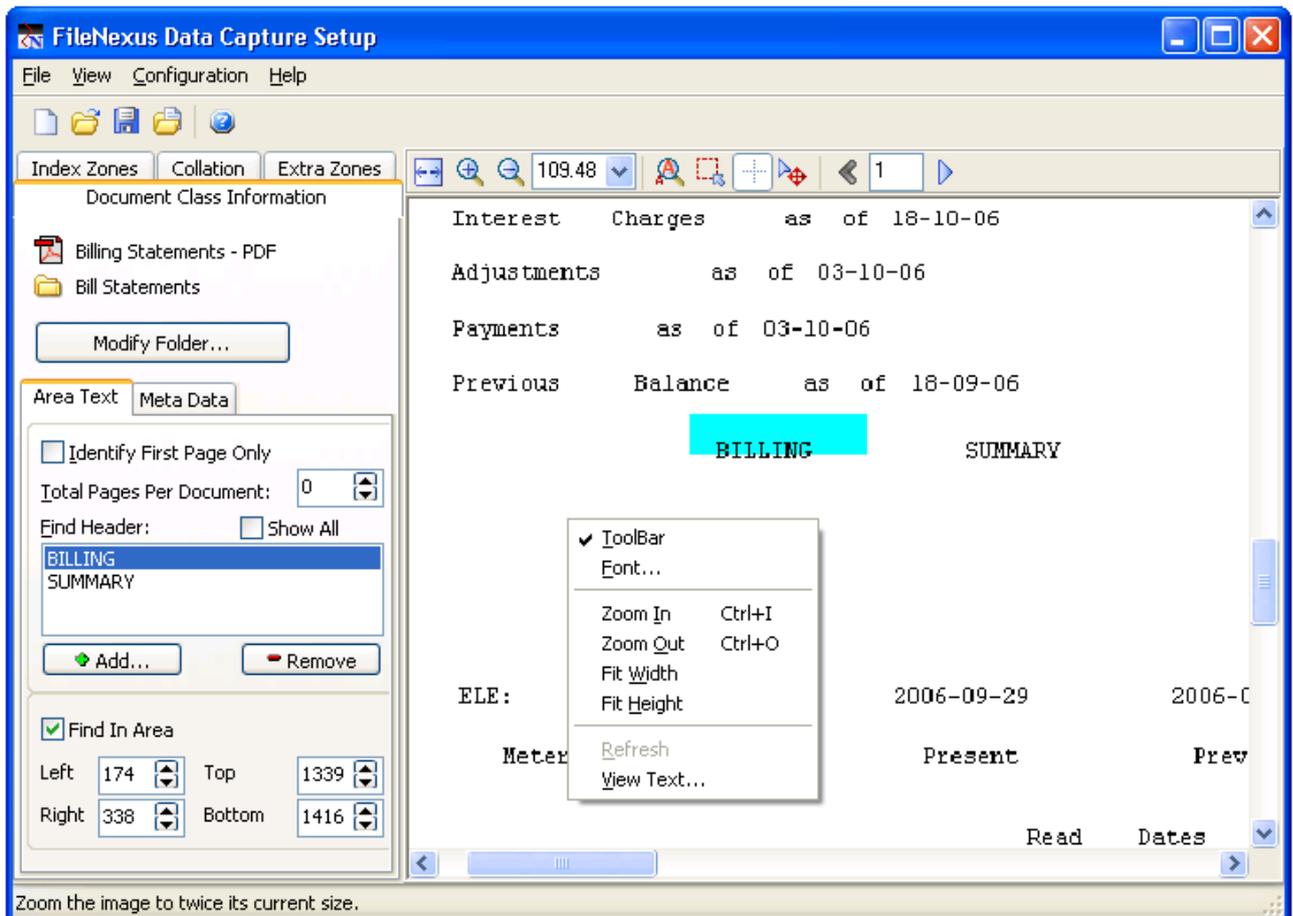
### Context Menu

ToolBar	Check button menu item that hides or displays the Text Sample toolbar.
Font	Allows the user to select the font type, style and size.
Zoom In	Zooms in by 33% of the current zoom.
Zoom Out	Zooms out by 33% of the current zoom.
Fit Width	Fits the image to the width of the screen.
Fit Height	Fits the image to the height of the screen.
View Text	Displays in notepad all text and coordinates of the text in the displayed image.



## Overview

The PDF sample maintains and displays a sample of data within a PDF document one page at a time for fast and easy viewing analysis. The view provides many features to aid in selection, navigation and finding of data throughout the sample document. Each header or key word found is brightly highlighted for quick reference. Features like block selection and cursor beyond end of line provide easy access to data zones like addresses and names. Also, gutter line numbers and status bar information provide a quick view of where text is located on a page.



### Loading a Sample Document

Click the **Open Sample** icon  in the main toolbar or the selection in the **File** menu. An **Open** dialog box will be displayed allowing the selection of a PDF file.

**NOTE:** The PDF file will be opened in a read only mode so no changes are possible to the original document. Also, because this is only a sample of the document only a preset number of pages will be loaded.

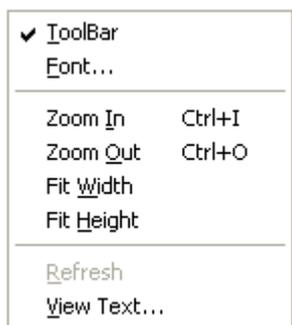
### PDF Sample View Toolbar

 Follow Window	Check button to indicate if the image will resize when the main windows width has changed.
 Zoom In	Zooms in by 33% of the current zoom.
 Zoom Out	Zooms out by 33% of the current zoom.
84.48%  Zoom Percentage	Magnification percentage of the original image.

 Magnifying Glass	Magnifies a small section of an image.
 Zoom Select	Zooms on a selected area.
 Select Area	Highlights a selected area
 Pan	Pans the display if it can scroll.
 Previous Page	Displays the previous page.
1 <input type="text"/> Page Number	Indicates the current page number and can be modified to display a different page.
 Next Page	Displays the next page.

### Context Menu

Toolbar	Check button menu item that hides or displays the Text Sample toolbar.
Font	Allows the user to select the font type, style and size.
Zoom In	Zooms in by 33% of the current zoom.
Zoom Out	Zooms out by 33% of the current zoom.
Fit Width	Fits the image to the width of the screen.
Fit Height	Fits the image to the height of the screen.
View Text	Displays in notepad all text and coordinates of the text in the displayed image.

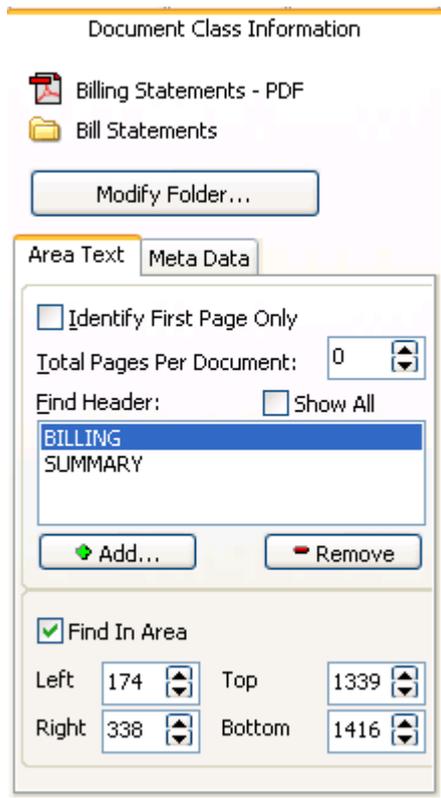


## Overview

The **Document Class Information** tab contains the settings that are normally used to identify documents and set their destination folder.

### Using the Document Class Information Tab

A Document Class can exist in any folder in FileNexus including folders that contain documents of another class. Clicking the **Modify Folder** button displays the **FileNexus Folder Selection** dialog to edit the destination **FileNexus Folder**.

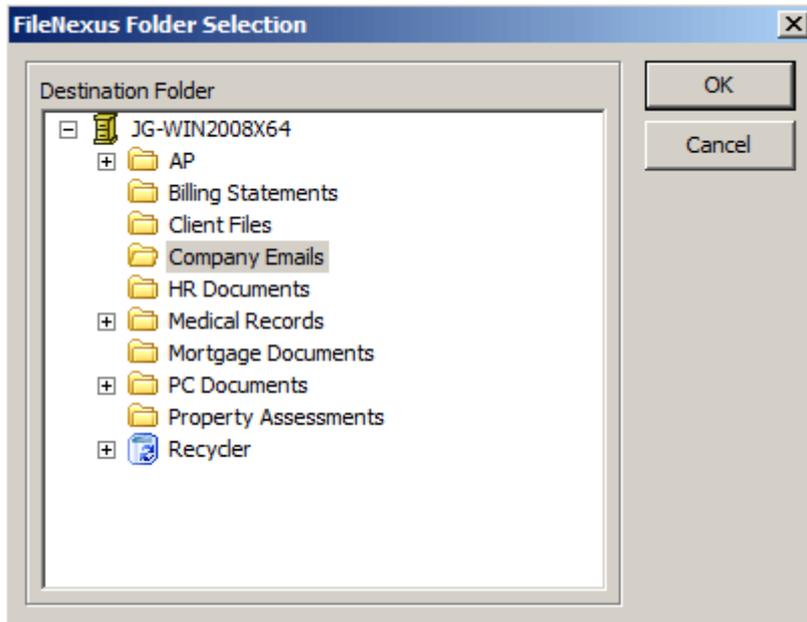


Section	Description
Document Class Name and Destination Folder	The top two items displayed under the heading Document Class Information are the Document Class and the Destination Folder in the FileNexus Client.
Modify Folder	Displays the FileNexus Folder Selection dialog box to select a new destination folder in the FileNexus Client for documents to be archived.

## Description

The **FileNexus Folder Selection** dialog box allows a user to select a document’s destination FileNexus folder. You can also create, delete or move folders if the you have the rights to do so. For setting up an email .ini file, you should choose the “Parent” folder under which you want all email recipient folders created.

NOTE: If a user does not have access to the folder, it will not be displayed.

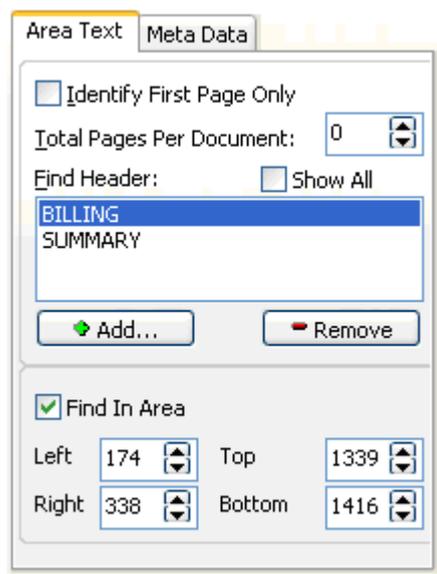


By right-clicking on any folder, a **Context** menu will appear.



Context Menu Items	Description
Refresh	Refreshes the <i>Destination Folder</i> tree view.
New Folder	Creates a new sub folder inside a folder.
Delete	Deletes an empty folder.
Rename	Sets the folder tree to edit mode to allow modification of a folder name.

## The Area Text Tab



### Identify First Page Only

If checked only the first page of a file contains the header and the rest of the documents in the file belong to the active FileNexus Capture Setting file.

### Total Pages Per Document

A single document contains the static number of pages if this value is greater than zero.

### Find Header

Displays a list of headers that **MUST** exist before the document is identified as the active FileNexus Capture Setting file. If no headers exist, then all documents are identified as the active FileNexus Capture Setting file.

### Show All

Highlights all Headers found in the sample view window.

### Add

Displays a **Class Header** dialog box to enter a single header to add to the Find Header list.

### Remove

Selecting a heading and Clicking the remove button will remove a header from the list.

### Find In Area

Check this option when a selected header is highlighted in Find Header list. This option ensures that the header must exist in a particular area of the document.

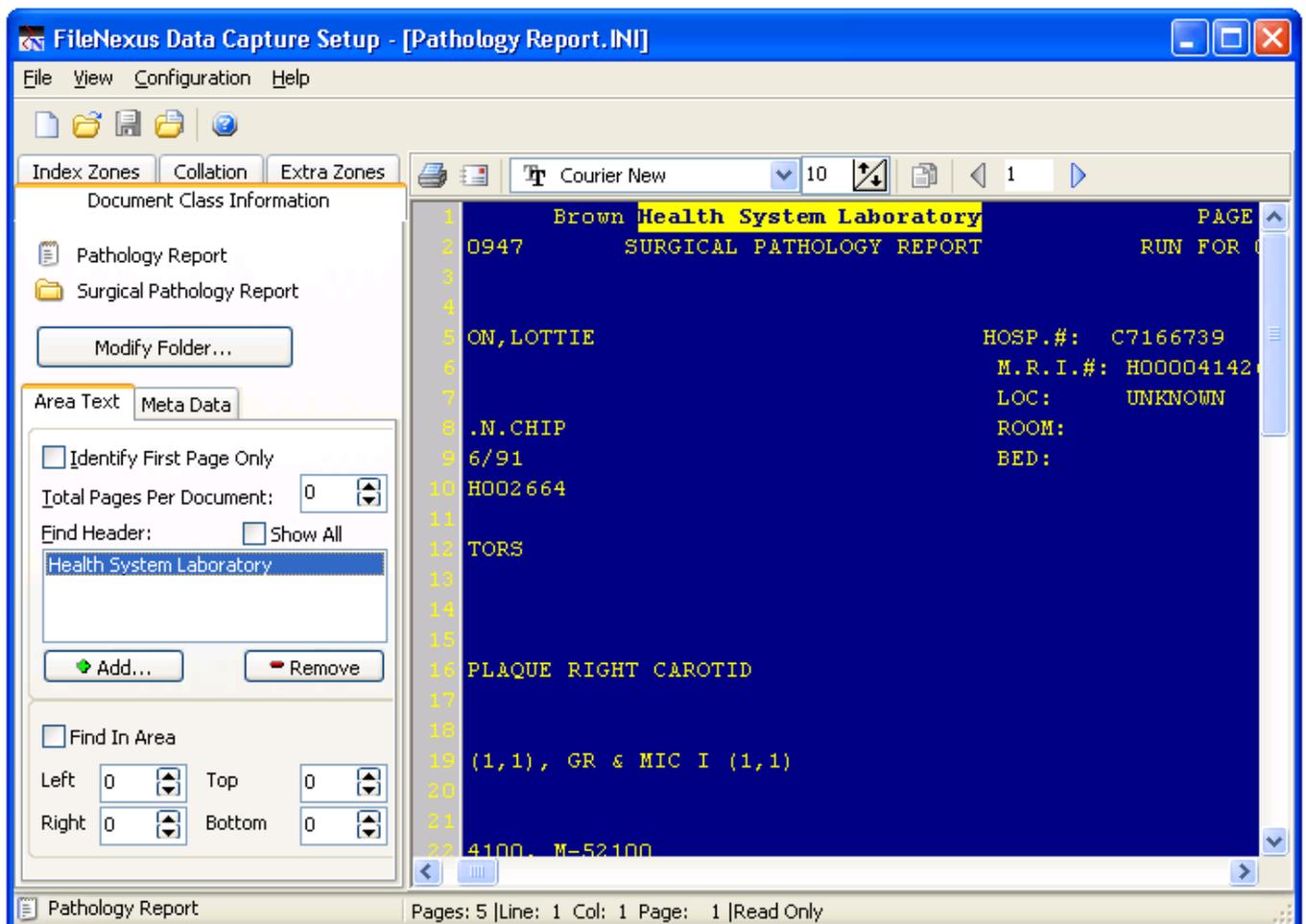
### Left, Top, Right, Bottom

The values that denote the area the selected header must exist in.

## Selecting a Document Header

The FileNexus identification process does not require a header, but if the documents sent to a FileNexus Capture Service span more than one type of class, a header must be defined. Click the **Add** button to enter the text of a header that exists in the document. If the header is entered incorrectly, select it in the **Find Header** list and click on **Remove**. The **Find In Area** checkbox is used to enable searching of the header in a confined area. Finding a header can sometimes be tricky. In some cases it may not be possible to omit the use of headers if the report data contains more than one type of document class within a single file.

If there is a text string unique to a document class, you can set it on the **Document Class Information Tab** on the left-hand pane of the **Data Capture Setup** window. Click on the **Add** button to enter the header present on the sample document. In the below example, each **Pathology Report** has the string "Health System Laboratory" located on the pathology report, so this is used as the "header". It could still be used as a header even if it was not located at the top of the document.



## The Meta Data Tab

### The Meta Data Tab

The screenshot shows a software interface with two tabs: 'Area Text' and 'Meta Data'. The 'Meta Data' tab is active. It contains the following elements:

- Meta data Location:** A dropdown menu with 'No Meta Data' selected.
- Meta data Name:** A dropdown menu that is currently empty.
- MetaData Must Exist:** An unchecked checkbox.
- Use Regular Expression:** An unchecked checkbox.
- Expression:** A text input field containing the text 'Health System Laboratory'.
- Value Found:** An empty text input field.

--- CONTENT TO BE ADDED AT A LATER DATE ---

**Meta data Location**

**Meta data Name**

**MetaData Must Exist**

**User Regular Expression**

**Expression**

**Value Found**

## Index Zones Tab

The Index Zones tab provides settings for a data capture service to collect index values for a single document. The information set here may also provide information on how a data file is separated into multiple documents of the same type.

### Using the Index Zones Tab

Select an index listed from the **Index Zone Name** list. If an index does not exist, press the **Add** button to add it to the list. Once an index is selected and if the index value is located in the same spot on each page of a report, highlight the area from the sample document where the index will be found. Located at the bottom of the **Index Zones** tab is an edit box displaying the text found. However, if the index value may exist in a different location on each individual document, use the [Find Zone](#) tab to set a key word anchor.

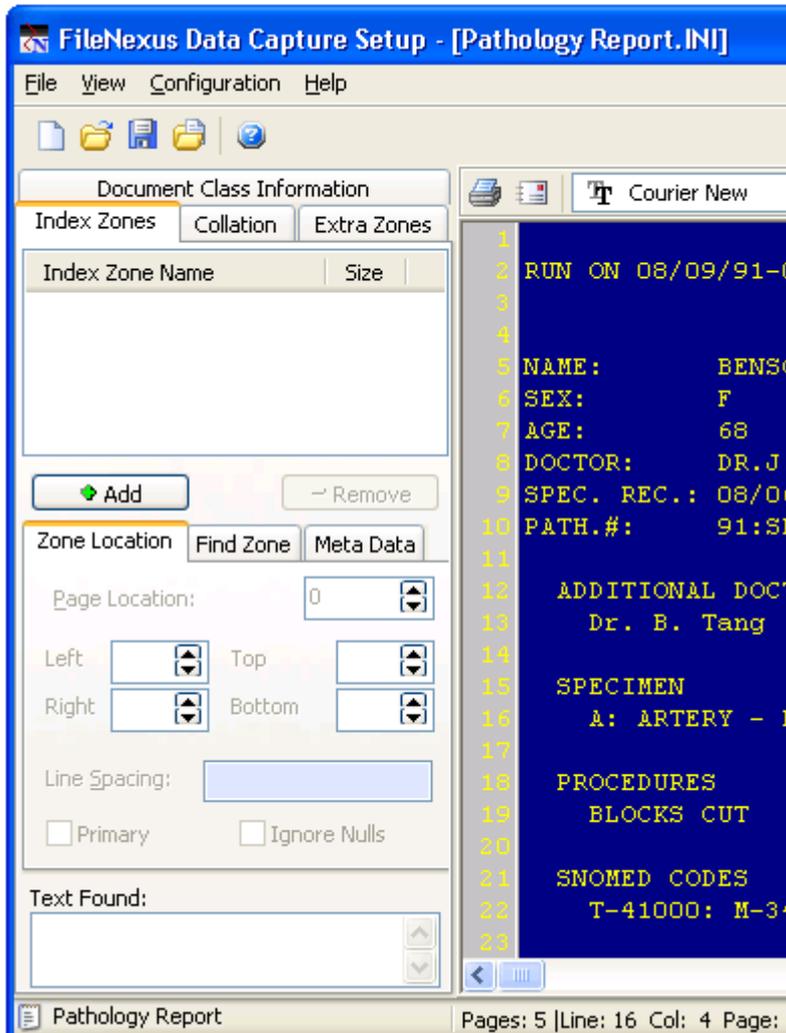
**NOTE:** At least one Index (on the Index Zones or Extra Zones tab) must have the **Primary** option checked if **Total Pages Per Document** value located on the [Document Class Information](#) tab is set to zero for unknown.

Section	Description
Index Zone Name List	A list view of indexes that will be used for index values for a single document.
Add	Displays a Select Index dialog box to add indexes that currently belong to the document class to the Index Zone List.
Remove	Removes indexes from the Index Zone List.
Page Location	Indicates the page number the index value will be found on. If the value is zero, the index value is collected from every page wiping out any values found on previous pages.
Left, Top, Right, Bottom	Values used to locate the index value on a page. The values will be in relation to the <a href="#">Find Zone</a> value if one exists.
Line Spacing	If an index value is found on more than one line or section, the data is spaced out by the character(s) found in the edit box.
Primary	During the document identification process, if the index value changes from the previous value, this signifies a new document.
Ignore Nulls	If the Page Location value is zero and Ignore Nulls is checked null, empty index data found on the document is ignored and it does not wipe out the previous value with a blank value.
Text Found	Displays what text is found and how it is formatted for the index value.

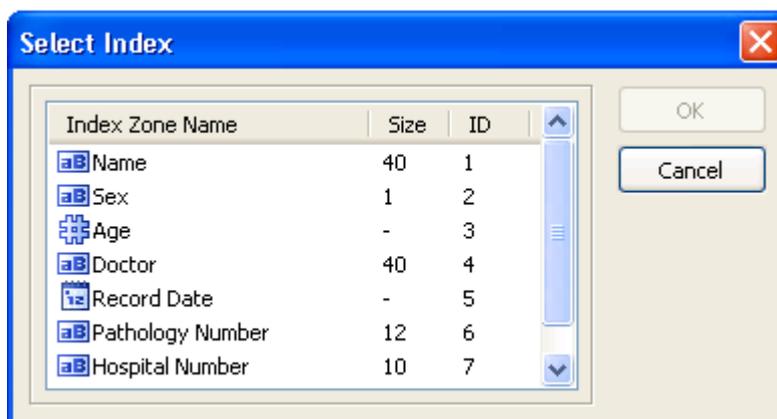
## Adding Index Zones

After you have defined how to distinguish the document (using headers, etc) on the **Document Class Information** tab and you have an adequate sample document loaded, you should proceed to the **Index Zones** tab to add indexes.

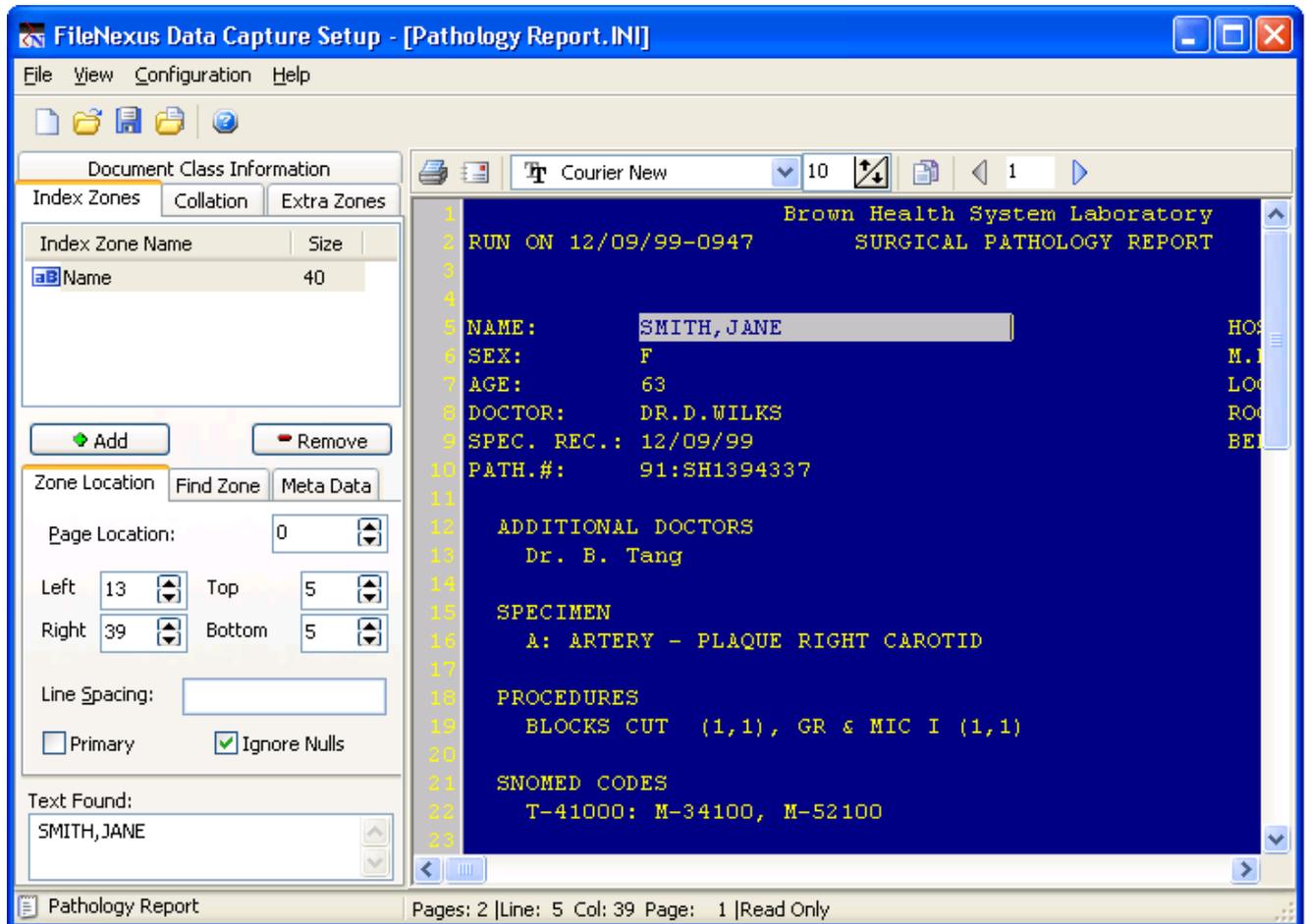
Click on the **Index Zones** tab in the left panel.



You will now need to click on the **Add** button to select an index. A **Select Index** dialog will appear.



You will need to add all of the indexes that will be populated with a value found on the document to be archived. Highlight the index you want to add and click **OK**. As you will notice in the window below, the **Name** index has appeared in the **Index Zone Name** list and is highlighted. To select the index zone simply place your cursor at the start of the index value and highlight the complete area.



If you look at the highlighted area on the right-hand pane in the image above, you will notice that the name "SMITH,JANE" is highlighted beyond the end of the name. The reason you should highlight beyond where the name appears is because you are setting the start and stop coordinates of the index. If you were to highlight only the name "SMITH,JANE", any names longer than 10 characters on the same type of report will be cut off. You can confirm the value for the highlighted index that FileNexus will capture by looking at the **Text Found** information box in the bottom left of the application window. Once you have completed defining the Name index click on the **ADD** button and select the next index until you have completed mapping all of the indexes. Once you have completed defining where to capture the values of all of the indexes in this manner, don't forget to save the INI file.

### Page Location

If the Page Location is set to 0, FileNexus will expect that the index value exists on every page of a document and will take the final value for the index from the last page. If the value exists on a specific page of a multi-page document, you may specify the page number here.

### Left

This represents the leftmost column or column number from which the index value begins.

**Top**

This represents the highest vertical position or line number in which the index value resides.

**Right**

This represents the rightmost position or column number to which the index value ends.

**Bottom**

This represents the lowest vertical position or line number in which the index value resides.

**Line Spacing**

If an index value is found on more than one line or section, the data is spaced out by the character(s) found in this edit box.

**Primary**

This option should be checked on for at least one index or extra zone value in order to instruct a FileNexus Capture Service on which value to burst a document into separate reports.

**Ignore Nulls**

If the Page Location value is zero and Ignore Nulls is checked, the index value from one page to another in a single burst report will not change if the mapped zone or data value on the document is null (blank).

**Text Found**

Displays what text a Capture Service will find and populate as the data value for a given index.

**NOTE:** At least one Index (on the **Index Zones** or **Extra Zones** tab) must have the **Primary** option checked if the **Total Pages Per Document** value located on the [Document Class Information](#) tab is zero.

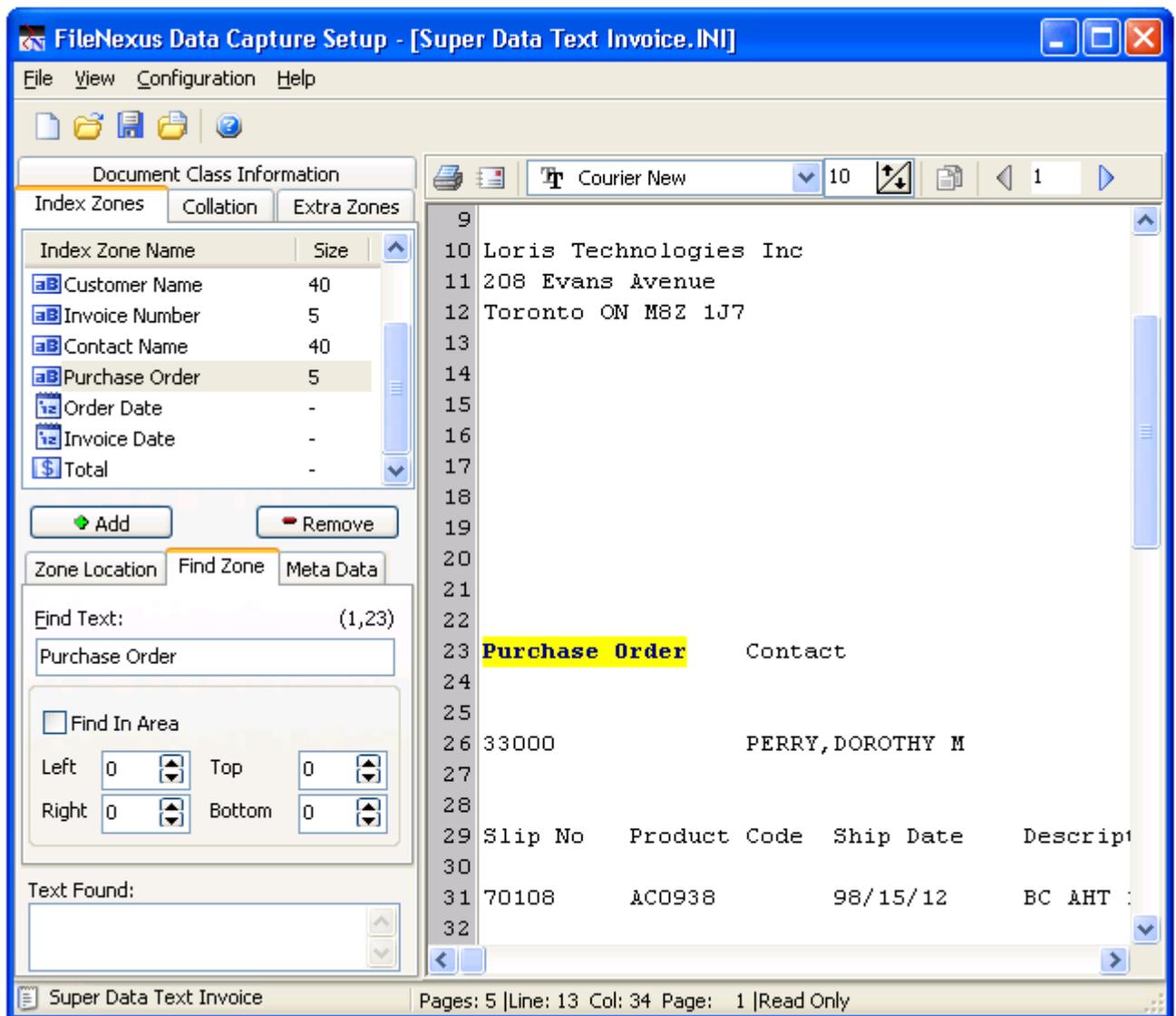
In cases where an index value may appear in different locations on the page, you may need to use the **Find Zone** feature on the **Find Zone** tab in order to correctly identify various indexes. See the next section for more detail.

## Find Zone

In some cases, required index data like Totals or Sums move up and down on a page depending on the data printed before it. Most data values contain a key word above, beside, or below the data required and based on the location relative to the key word anchor, the required data can be obtained.

### Using Find Zone

1. Enter the string or anchor text to search for on the Sample Document. The search is case sensitive, so enter the word(s) in the case being searched for in the **Find Text** edit field. Clicking somewhere else on the **Collation** tab or hitting the Tab key will highlight all occurrences of the text in the sample view. Only the first occurrence of the key word is used as a basis for index value location.

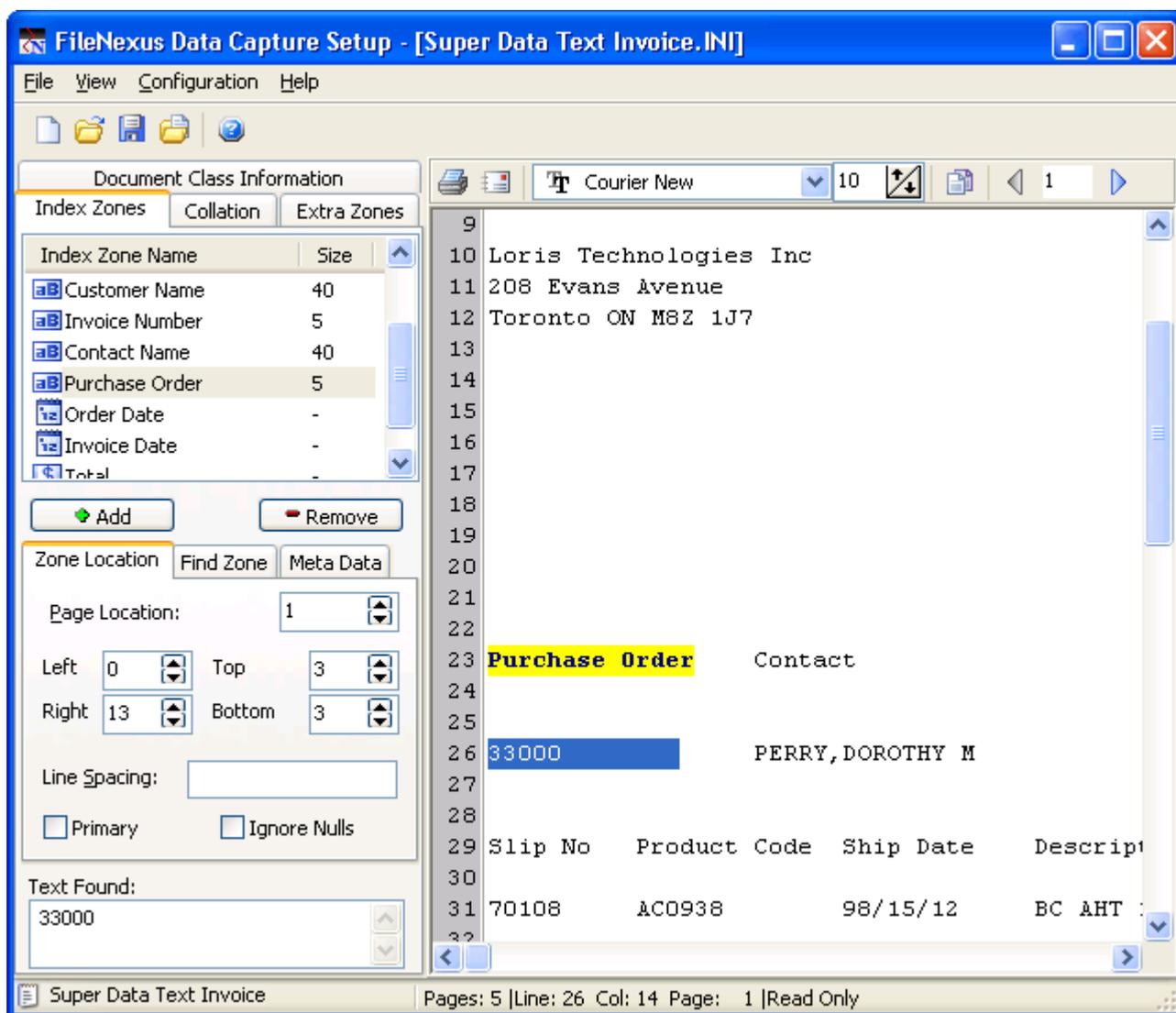


2. Check **Find In Area** if the text to find is common like "name" then draw a box around the area of the sample document where the correct first occurrence of the text will be found.

**NOTE:** Find Text and Find Column are the only options that require a sample

document loaded with the required key word or anchor. Once entered, a location number in brackets appears on the top right corner of the tab. This value indicates where the anchor is found and the area selected in the Zone Location or column Location will be relative to this position.

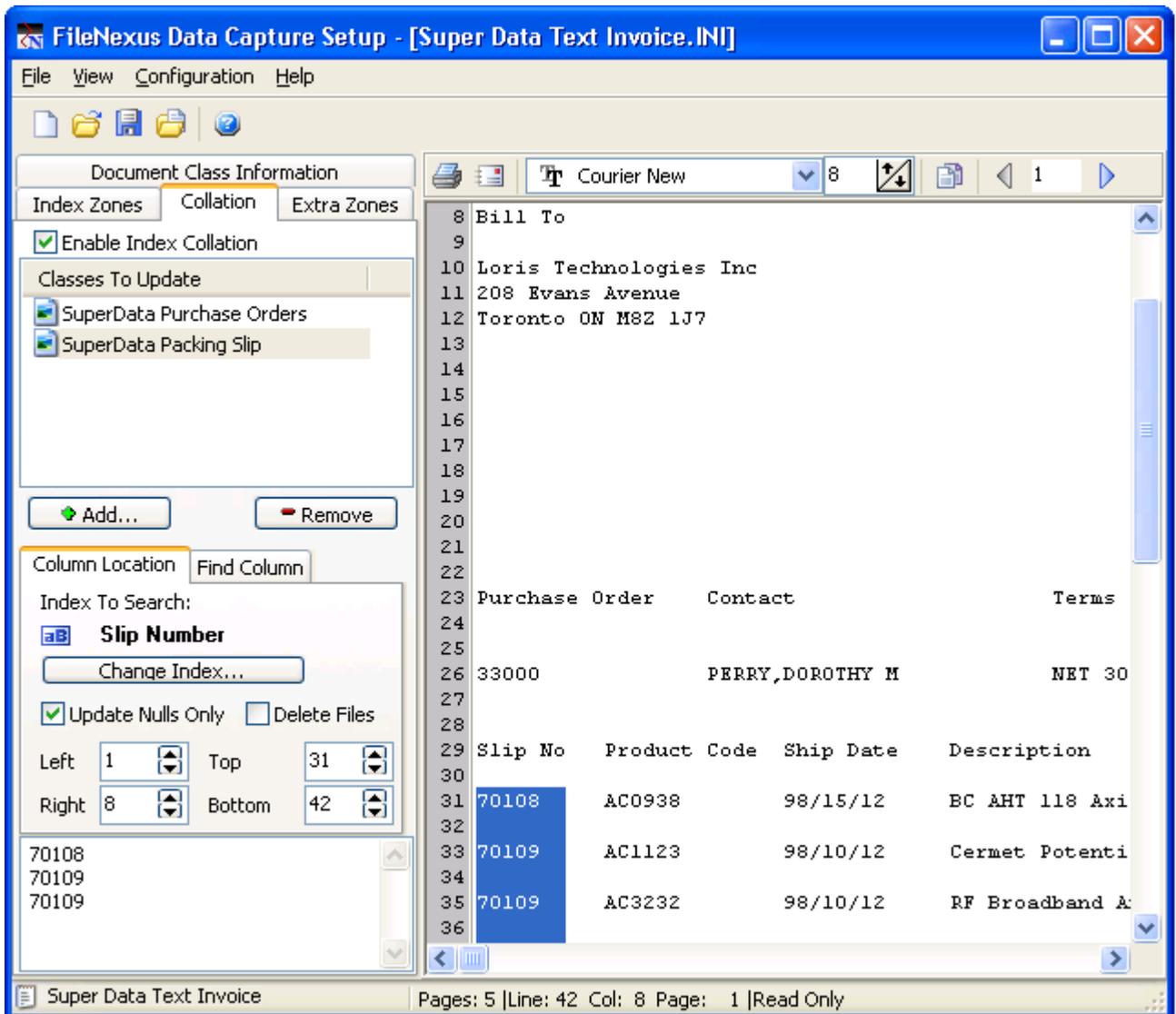
3. Return to the **Zone Location** sub tab on the **Index Zones** tab and highlight where to find the **Index** value in the sample document (highlighted in blue in the image below). You'll notice that the key word or anchor search string is highlighted in yellow.



4. The found value will appear in the **Text Found** memo field.
5. Be sure to save your changes to the Capture Settings file (.INI file) you are currently editing before closing the file or **Data Capture Setup** program.

## Collation Tab

Sometimes different types of documents stored in FileNexus are related like invoices, packing slips, and purchase orders. The **Collation** tab contains settings that allow FileNexus to update the index values of archived documents like Packing Slips and Purchase Orders with information from new documents being archived, like Invoices.

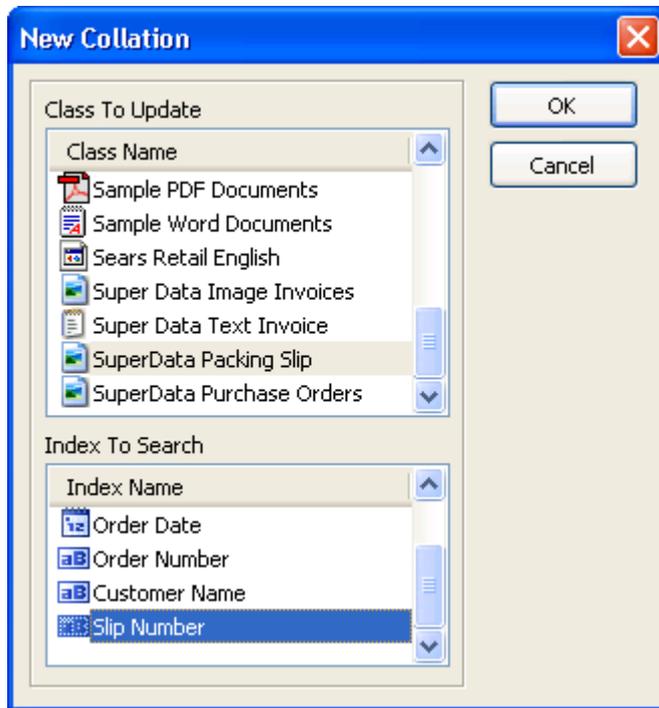


Section	Description
Enable Index Collation	Enables or disables the collation process.
Classes To Update	List of document classes that will be searched to find documents to update with index values found in the identified document.
Add	Clicking this button displays the New Collation dialog that requests a document class and an index to search on.
Remove	Pressing this button when a document class is selected removes the selected class from the Classes To Update list.
Index To Search	Displays the index that will be used to search for the document to update.
Change Index	Modifies the index that will be used to search for documents.
Update Nulls Only	When checked, only documents found with null index values will be updated.
Left, Top, Right, Bottom	Area to locate the data that will be used to search for one or more documents.
Text Found	Displays what text is found on the sample document. Each line represents a value that will be searched.

## Using Collation

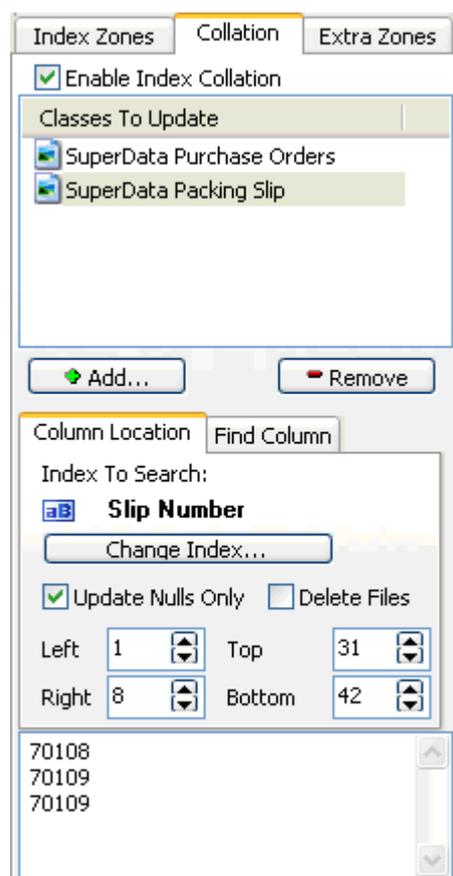
To employ the Collation feature in FileNexus, you must first enable collation by checking the **Enable Index Collation** checkbox on the **Collation** tab for a given document's Capture Settings file.

1. Check on **Enable Index Collation**
2. Click on **Add** to select which Document Class to run collation against. This will open up the **New Collation** window.

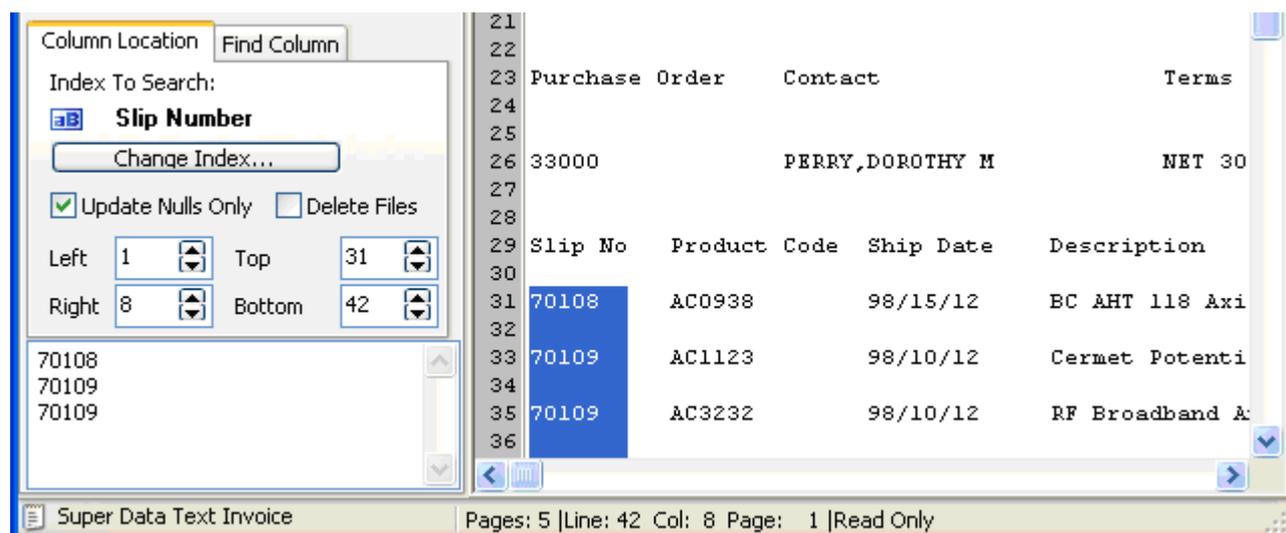


3. In the **New Collation** window, select the Document Class you wish to update along with the index value in the class to search against. This index value must exist on both the document being archived and any documents to be updated; Slip Number in the above example. The result is that a **Super Data Packing Slip(s)** document will be updated if its **Slip Number** index value is the same as the Slip Number value on the document being archived (a Super Data Text Invoice).
4. Hit **OK** to return to the **Collation** tab and verify the classes to be updated in the **Classes To Update** list.

If the **Index To Search** displayed is incorrect, click on **Change Index**. Click on **Add** or **Remove** to add or remove Document Classes to update.



5. Select/highlight the area in the sample document (right pane) where the index to search is located. The values found will be displayed in a memo field in the bottom left of the **Collation** tab. However, the data may exist in different locations on each individual document, using the **Find Column** tab will provide a key word anchor to ensure the correct data is selected each time.



6. Be sure to save your changes to the Capture Settings file (.INI file) you are currently editing before closing the file or **Data Capture Setup** program.

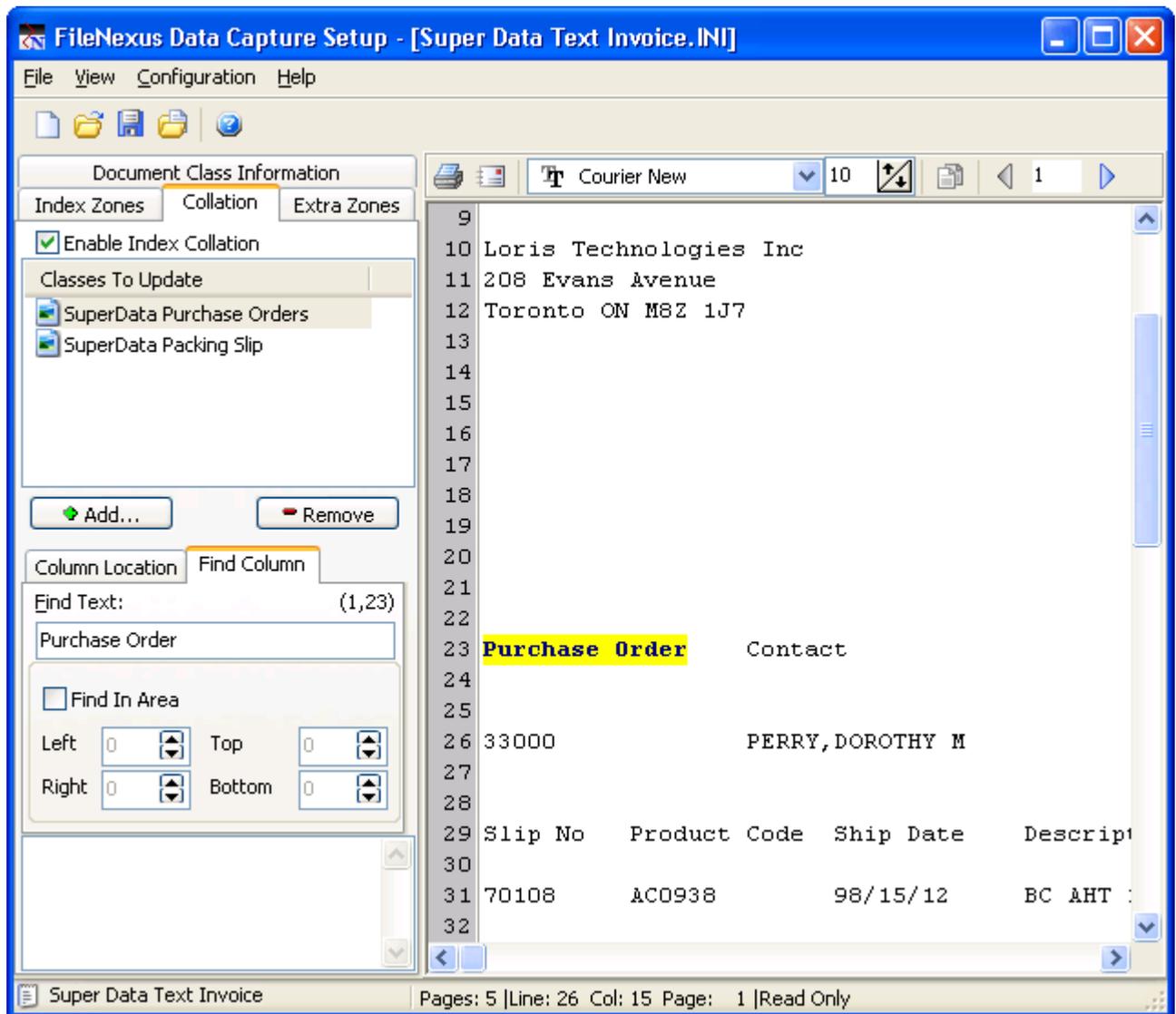
## Find Column

In some cases required data like total or sums moves up and down a page depending on the data printed before it. Most data values contain a key word above, beside or below the data required and based on its relative position to a key word or anchor, the required data can be obtained.

### Using Find Column

1. Enter the string or anchor text to search for on the Sample Document. The search is case sensitive, so enter exactly the word(s) and case being searched for in the **Find Text** edit field. Clicking somewhere else on the Collation tab or hitting the Tab key will highlight all occurrences of the text in the sample view. Only the first occurrence of the key word is used as a basis for index value location.
2. Check the **Find In Area** if the text to find is common like "name" then select the area where the correct occurrence of the text will be found.

**NOTE:** **Find Text** and **Find Column** are the only options that require a sample document loaded with the required key word or anchor. Once entered a location number in brackets appears on the top right corner of the tab. This value indicates where the anchor is found and the area selected in the Zone Location or Column Location will be relative to this position.



- Return to the **Column Location** sub tab on the **Collation** tab and highlight where to find the **Index To Search** value in the sample document (highlighted in blue in the preceding image).