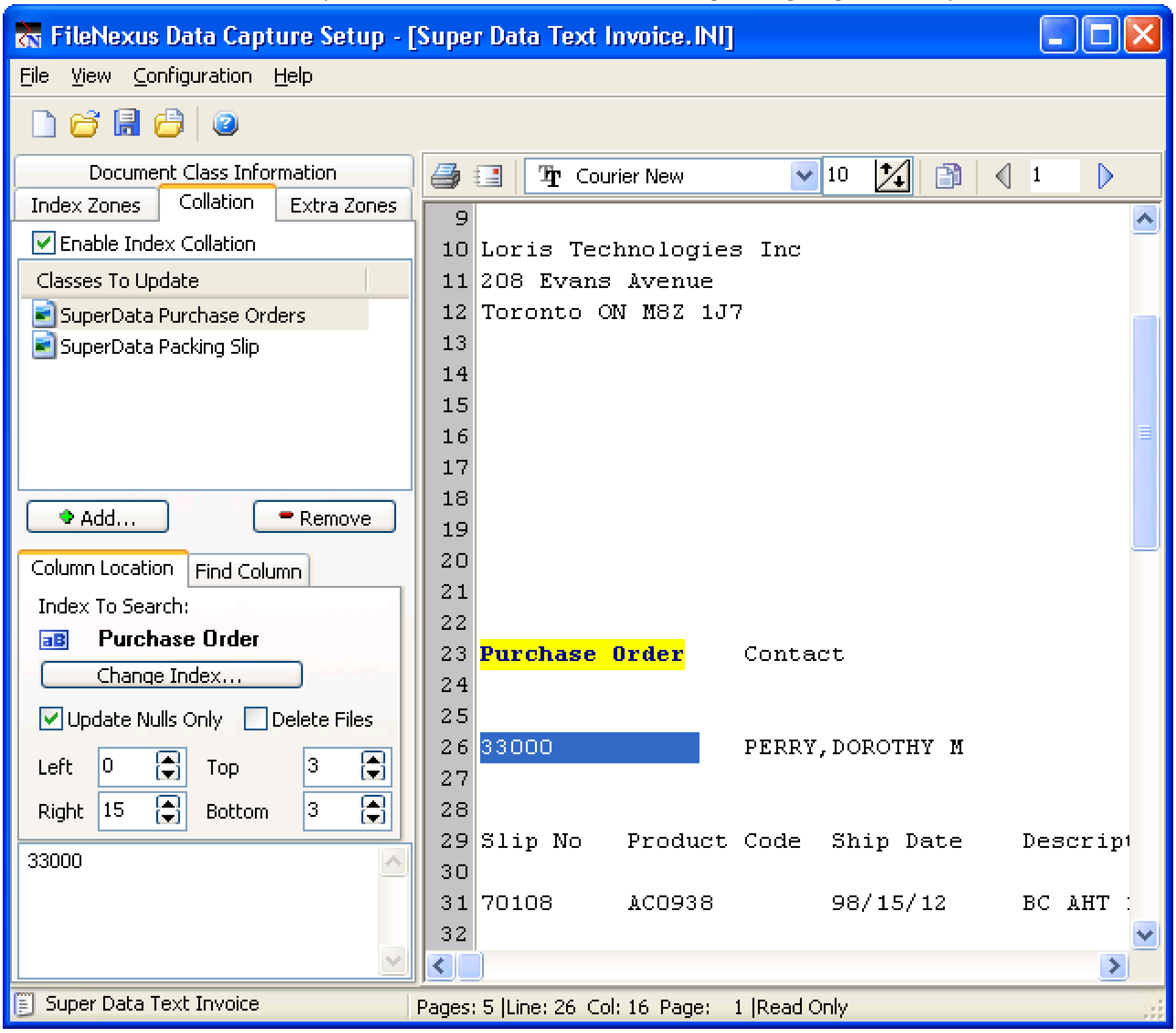
You'll notice that the key word or anchor search string is highlighted in yellow.

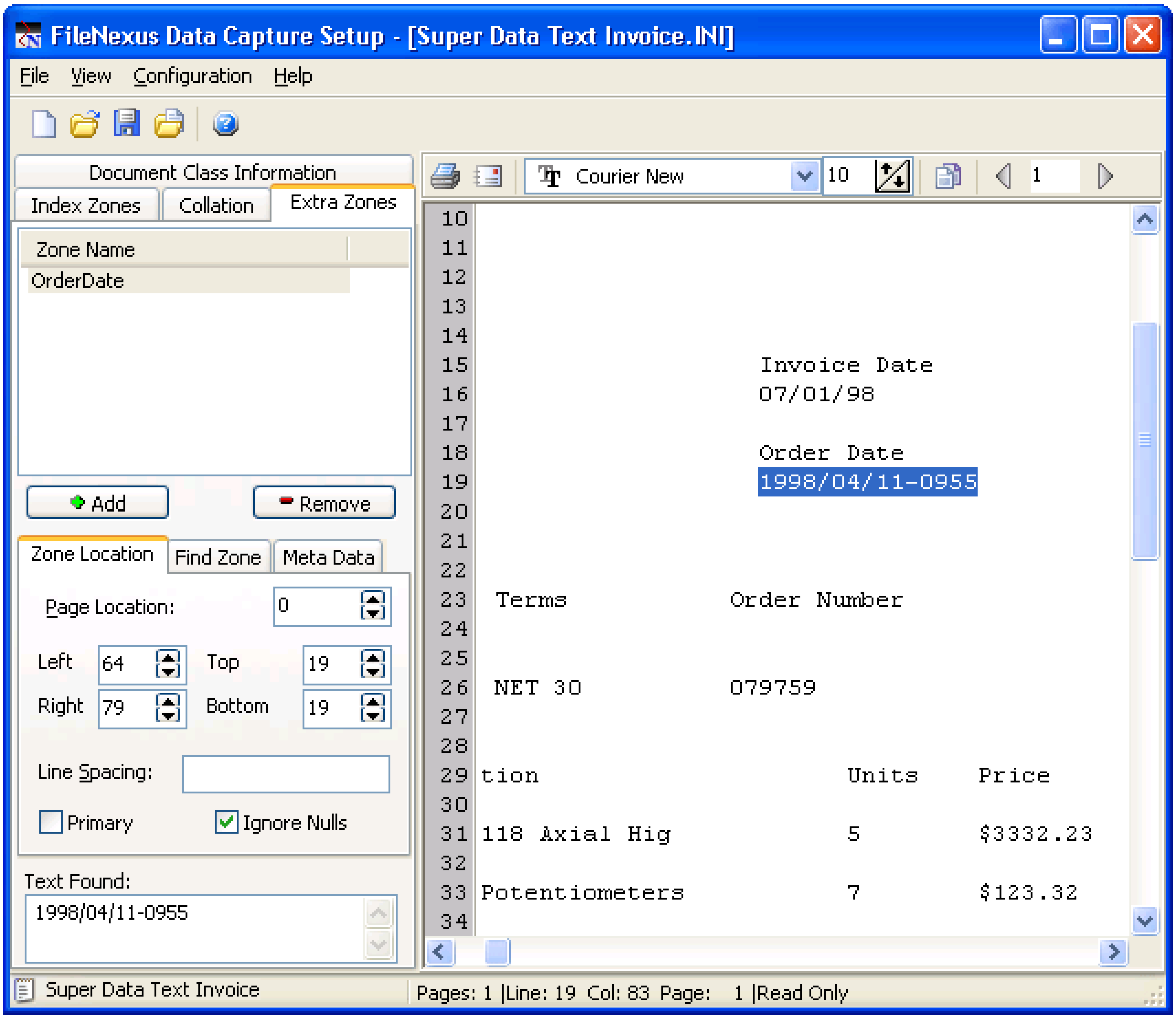


4. The found value(s) will appear in the bottom left memo field.

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.

Extra Zones Tab

The **Extra Zones** tab provides the ability for a FileNexus Capture Service to collect values from a document that may require reformatting or somehow used to populate an index. In addition, a value on the **Extra Zones** tab can be used as the "primary" index (if no suitable index value exists on the **Index Zones** tab) to separate documents.



Using the Extra Zones Tab

1. Click the **Add** button to add a new extra zone to the Zone Name list view. The new zone appears in edit mode which allows for it to be renamed.

2. After creating the extra zone and still selected, highlight the area from the sample document where the extra zone value will be found.

3. The **Text Found** memo field in the bottom left will display the value found for the currently selected Extra Zone. If the extra zone value can exist in a different location on each individual document, use the Find Zone tab to set a key word anchor. The extra zone is used for modifying language or stripping out correct values for an index as the Extra Zone Script Example demonstrates (found in your Sample Scripts directory on the FileNexus Server).

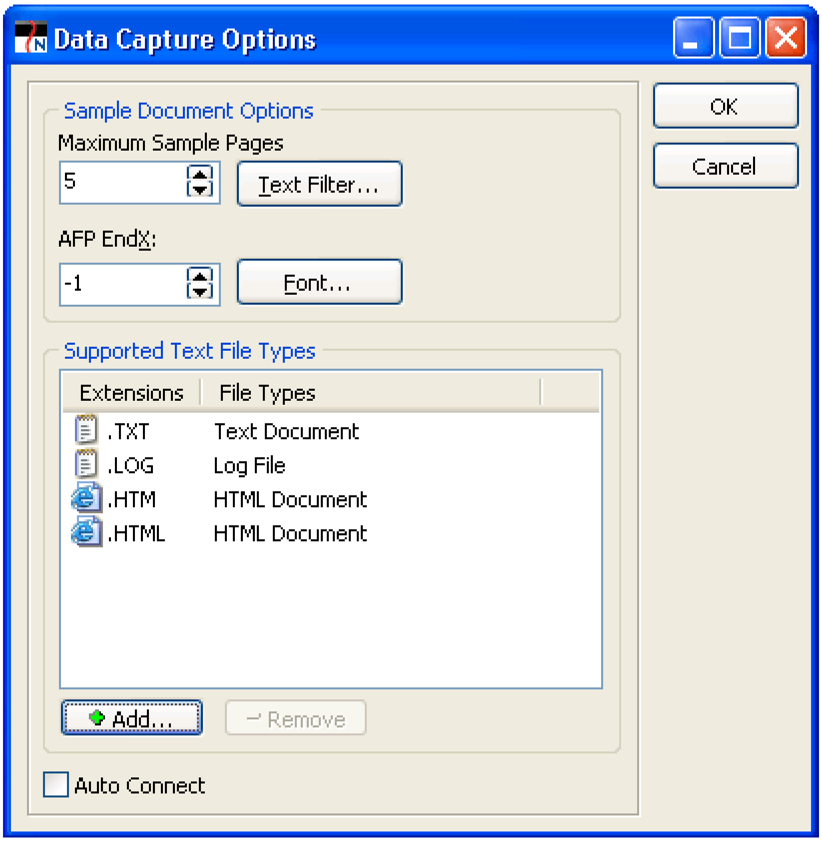
NOTE: At least one Index (on the Index Zones or Extra Zones tab) must have the **Primary** option selected if the **Total Pages Per Document** value on the Document Class Information tab is zero.

Section	Description
Zone Name List	A list of extra zone values that will be collected from a document.
Add	Click this button to add an extra zone.
Remove	Removes the selected extra zone from the Zone Name List.
Page Location	Indicates the page number the zone 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 Find Zone 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 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.

The **Find Zone** option on the **Extra Zones** tab works the same as the **Find Zone** option on the **Index Zones** tab. Please refer to the Find Zone section for more information.

Data Capture Options Dialog

The Data Capture Options dialog box provides configurable options for the FileNexus Data Capture Setup program environment. Use these configurable options to set how to view a sample document or select the Text Filter properties for a capture settings file. To access this dialog, click on the **Configuration Menu** in the Data Capture Setup program and select **Options.**



Changing the Environment Options
If you require loading more than 5 pages of a sample document, change the *Maximum Sample Pages* value accordingly. However, if you set this to a very large value (hundreds or thousands of pages) the loading of the sample document may take some time.

Text Sample Documents
In some cases a text document does not conform to standard text. To accommodate viewing or page break issues that arise from nonstandard text (embedded print character, page breaks, irregular tabs, etc), click the **Text Filter** button to change how a text file is loaded and organized into pages. If a text based document class cannot be found in the **FileNexus Folder & Document Class** dialog, then its file type may need to be added to the Supported Text File Types list. Click the **Add** button to add the required text file type. Refer to the section on Text Filter Properties for more information.

AFP Sample Documents
AFP documents are not fully rendered to the screen and only the text of an AFP document is extracted and will be drawn. Because of this, the default font may not be small enough or big enough to represent all text on a page. Click the *AFP Font* button to change the default font type and size to improve the AFP viewing. Also, if the logical

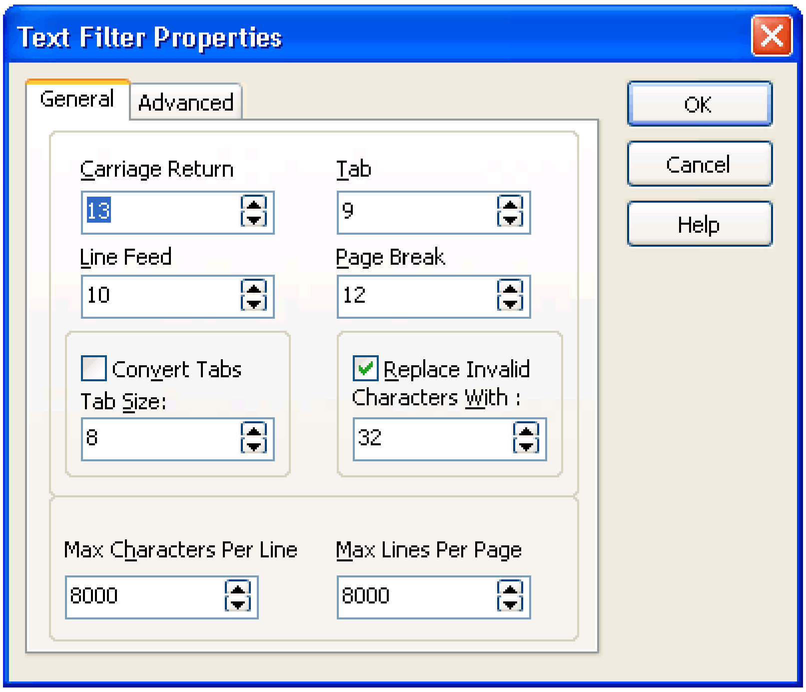
page of the AFP document has 2 physical pages that get printed on one sheet, it may be necessary to split the logical page into 2 separate pages. To do this, change the *AFP EndX* value to the middle point of the logical page.

Section	Description
Maximum Sample Pages	The total number of pages that will be loaded and saved.
Text Filter	Clicking the button displays the Text Filter Properties dialog box.
AFP EndX	Changing the EndX value to a positive number will split the next loaded AFP sample document's page down the middle creating 2 logical pages for every page loaded.
AFP Font	Pressing this button displays a font dialog box.
Supported Text File Types	List view of supported text file types that will be displayed in the FileNexus Folder & Document Class dialog.
Add	The Add button displays the Document File Types dialog allowing selection of a document type to be added to the *Supported Text File Types* list.
Remove	Clicking remove after selecting a file type removes the text file type from the *Supported Text File Types* list.
Auto Connect	The check box enables the user to connect without seeing the login dialog box when the application first starts.

Text Filter Properties Dialog

The **Text Filter Properties** dialog contains a number of configurable options to help FileNexus load a particular text file. If a text file is a non-standard text document, it may be necessary to adjust some of the text filter properties to load and format the text into a standard format for viewing.

General Tab



Changing the Text Filter properties

If the text of a sample document has non-standard carriage returns, line feeds, tabs, or page break characters, changing the values for the **Carriage Return**, **Line Feed**, **Tab**, or **Page Break** will reformat the text to contain the correct values of 13, 10, 9, and 12 respectively.

Convert Tabs

Tab characters can be replaced by spaces once this check box is checked. The number of spaces is determined by the value of the **Tab Size** value. Converted tabs increase to the total number of characters in a line and the line may be truncated by the value of *Max Characters Per Line*.

Replace Invalid Characters With

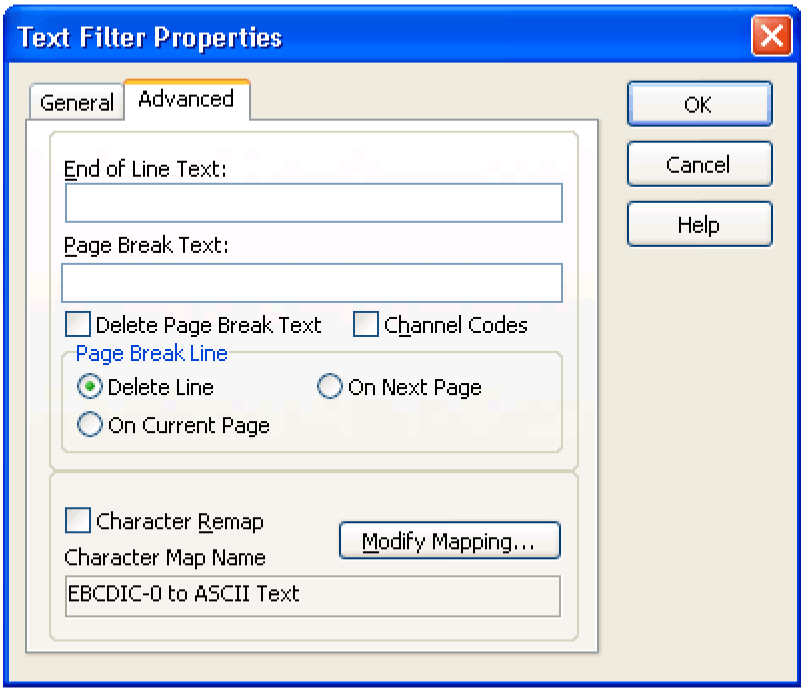
This option will replace the character that has the decimal value of 0 with the "*Characters With*" value. Also, if checked and the Carriage Return, Line Feed, Tab, or Page Break options are not the default values, characters with the decimal values of 13, 10, 9, and 12 will be replaced as well.

Max Characters Per Line

If no carriage return signal is found on a line of text and the total number of characters on the line reaches the value of *Max Characters Per Line*, a carriage return character is added and new line is started.

Max Lines Per Page
If no page break signal is found in a text stream and the total number of lines reaches the value of *Max Lines Per Page*, a page break character is added and a new page is created.

Advanced Tab



End of Line Text
Not all text documents have correctly formatted end of line character sequences. The *End of Line Text* allows for a string of data to represent the end of line signal as well. If the string requires the use of non-visual characters like a carriage return or line feed, enter the string using Binary Character Formatting to obtain the characters.

Page Break Text
Enter a string of text into the Page Break Text edit field that if found signal the end of a page. If the **Delete Page Break Text** is checked, only the text in the edit box is deleted, however, if the "Delete Line" option is selected as the Page Break Line option, the whole line is deleted. Selecting "On Current Page" sets the page break after the line and selecting "On Next Page" sets the page break before the line.

Channel Codes
This option is used for text files that have channel codes in the first column of a text report, which may contain the page break signal.

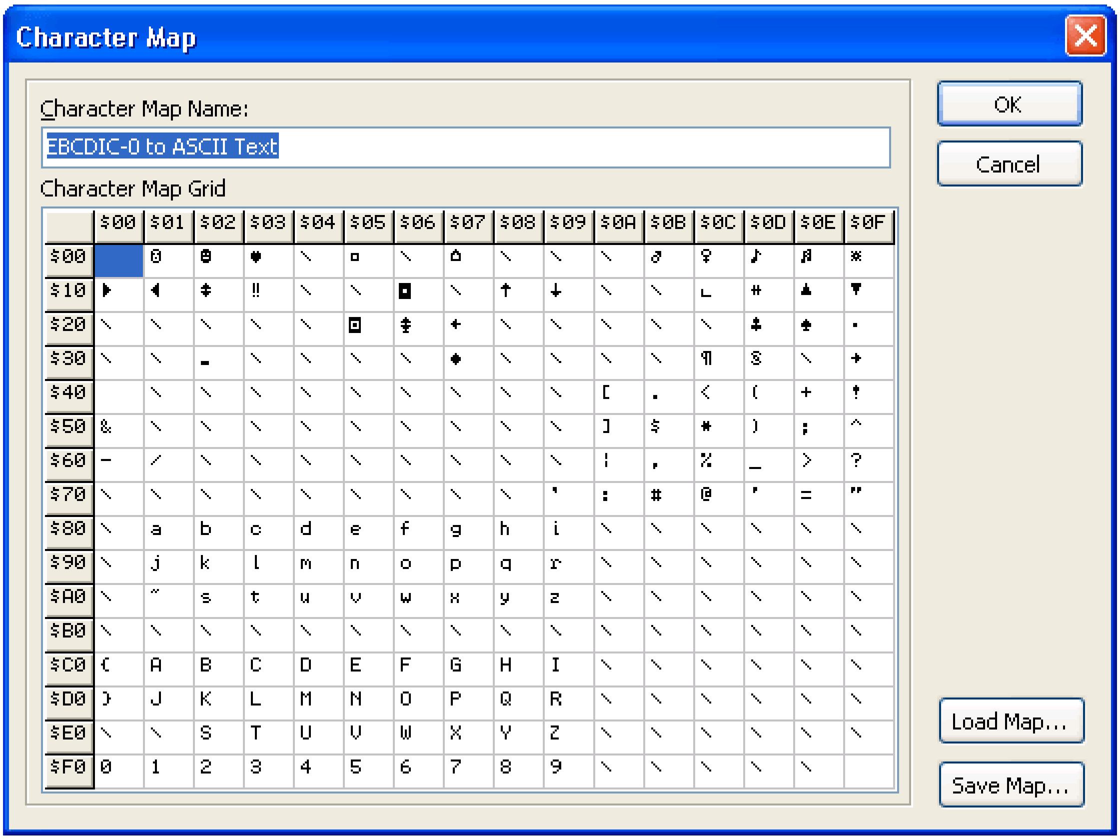
Character Remap
If this is checked, all text characters are remapped according to the character map settings. The remapping is done before any other setting is used. To modify the map settings, click the **Modify Mapping** button to display the Character Map dialog box.

Section	**Description**
Carriage Return	The decimal values of the carriage return character found in the text file. This va can be any number from 0 to 255.
Line Feed	The decimal values of the line feed character found in the text file. This value ca be any number from 0 to 255.
Tab	The decimal values of the tab character found in the text file. This value can be any number from 0 to 255.

Page Break	The decimal values of the page break character found in the text file. This value can be any number from 0 to 255.
Convert Tabs	Check box enables or disables conversions of tabs to spaces.
Tab Size	Number of spaces to use when converting a tab character. This has a range of 1 to 255.
Replace Invalid	Check box enables or disables converting of invalid characters.
Characters With	The decimal value of the character to convert invalid characters to.
Max Characters Per Line	Maximum number of characters on a line before a new line is created. This value has a range of 2 to 8000.
Max Lines Per Page	Maximum number of lines that can exist on a page before it is broken into separate pages. This value has a range of 1 to 8000.
End of Line Text	An edit field of characters that represent the end of a line. This value can be any string and can use Binary Character Formatting rules to display non-visual characters.
Page Break Text	An edit field of characters that represent the end of a page. This value can be any string and can use Binary Character Formatting rules to display non-visual characters.
Delete Page Break Text	Check box enables or disables the deletion of the *Page Break Text* string if found.
Channel Codes	Enables identification and removal of channel code data.
Page Break Line	Radio button allows for selection of deleting the whole line of text where the Page Break Text string was found or keeping it on the current page or the next page.
Character Remap	Change all characters found in the text before applying all other options.
Modify Mapping	Clicking this button will display the Character Map dialog box to allow modifications of the character map used.
Character Map Name	Name that describes the type of character remapping that will occur.

Character Map Dialog

The Character Map dialog enables the modification of how each character of a text stream is converted to ASCII standard text. This dialog even provides a means of saving and loading the character map from a file.



Changing the Character Map

First provide a name to the character map that will be created. This provides visual reference of the type of mapping used in the [Text Filter Properties Dialog](). The *Character Map Grid* contains 255 cell entries for each ASCII character. The grid is arranged so that finding a hex value of a character is simple. To find the value $B8, follow the left most column down until row $B0 is found then follow the top most row across until column $08 is found. The point where row $B0 and column $08 intersect is where the cell for value $B8 can be found. Once a cell is found that needs to be modified, click the cell until it turns into edit mode, delete the character currently in the cell and enter the correct ASCII character. If the character requires the use of non-visual characters like carriage return or line feed, enter the character using **Binary Character Formatting** to obtain those characters.

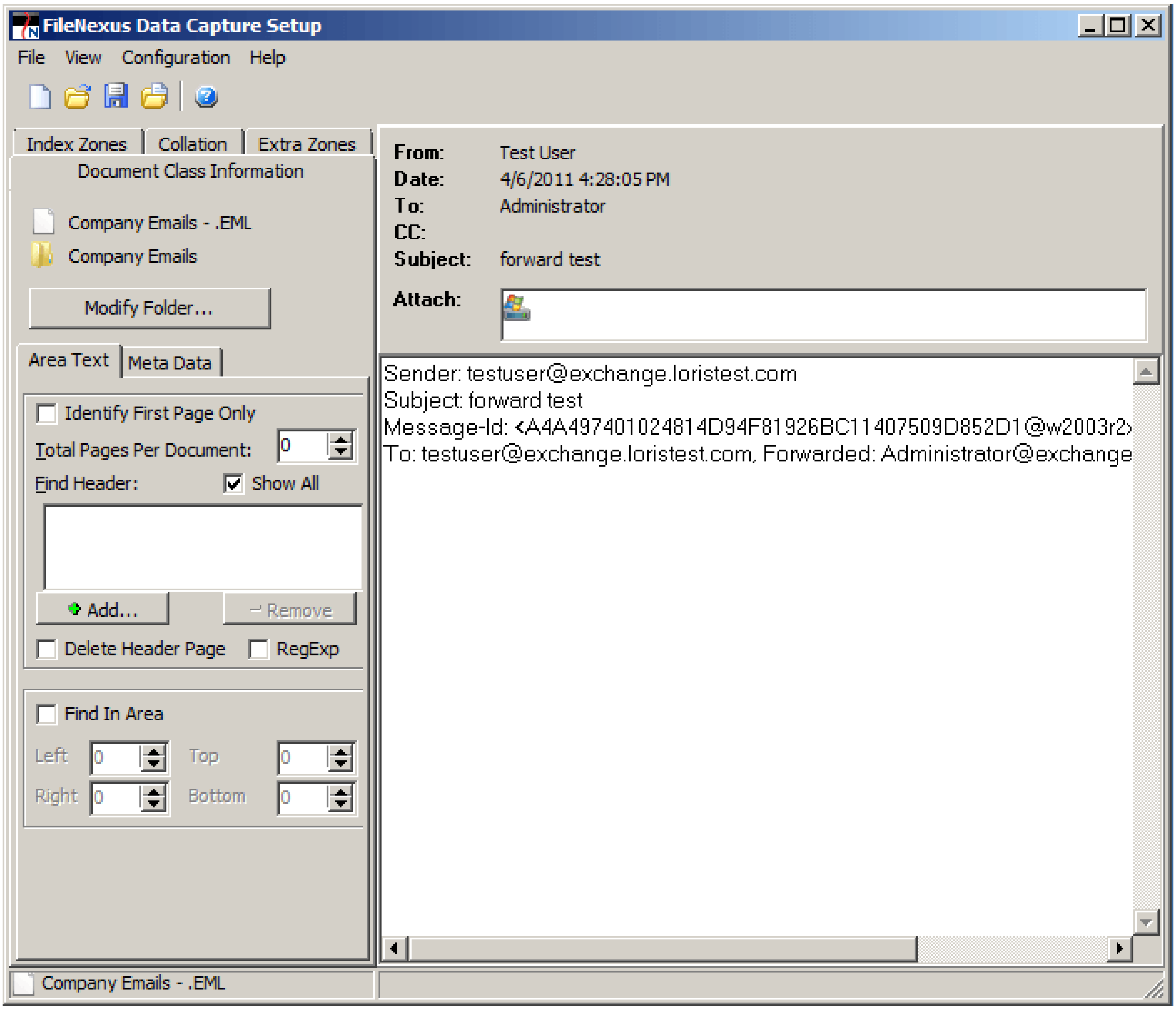
Section	Description
Character Map Name	The name of the character mapping.
Character Map Grid	A 255 cell grid that enables editing of characters.
Load Map	Displays an Open Dialog box to allow selection of a FileNexus Character Map file.
Save Map	Displays a Save Dialog box to save a FileNexus Character Map file.

Overview

Since setting up an email .ini file is quite different from setting up Text and PDF Capture Setup files, the following section will elaborate on a sample setup for an organization's automatic email archival to FileNexus.

After you have chosen to create a new Email Capture Settings file (see Creating a Data Capture Settings File section), you may choose to open a sample .eml file.

The Email sample view maintains and displays a small sample of data one page at a time for fast and easy viewing analysis.

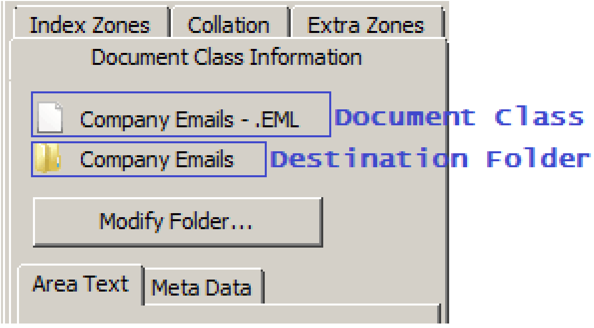


Loading a Sample Document

Before opening a sample .eml 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 an email file.

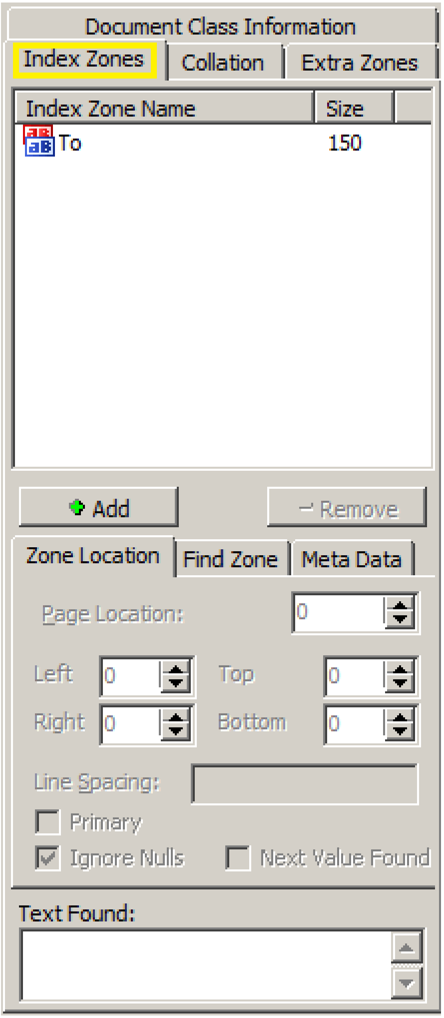
NOTE: The .eml file will be opened in a read only mode so no changes are possible to the original document. Also, because this is only a sample of the document only a preset number of pages (which can be modified in the *Filter Settings*) will be loaded.

If you have already selected your **Destination Folder** and **Document Class**, you will not need to configure any additional settings on the *Document Class Information* tab for an email capture setup file.



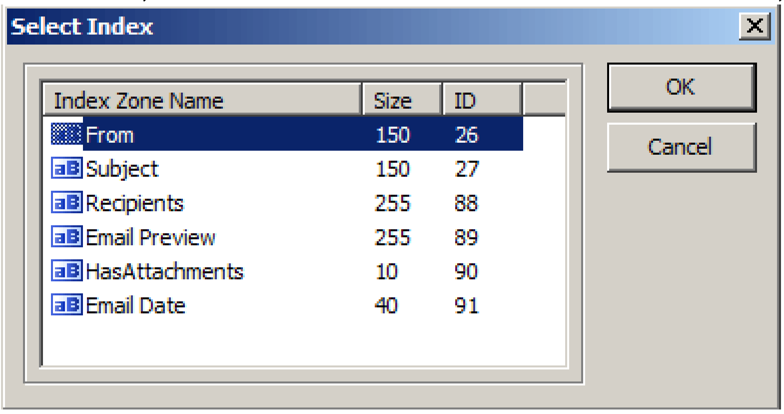
You may proceed to the *Index Zones* tab.

The Index Zones Tab

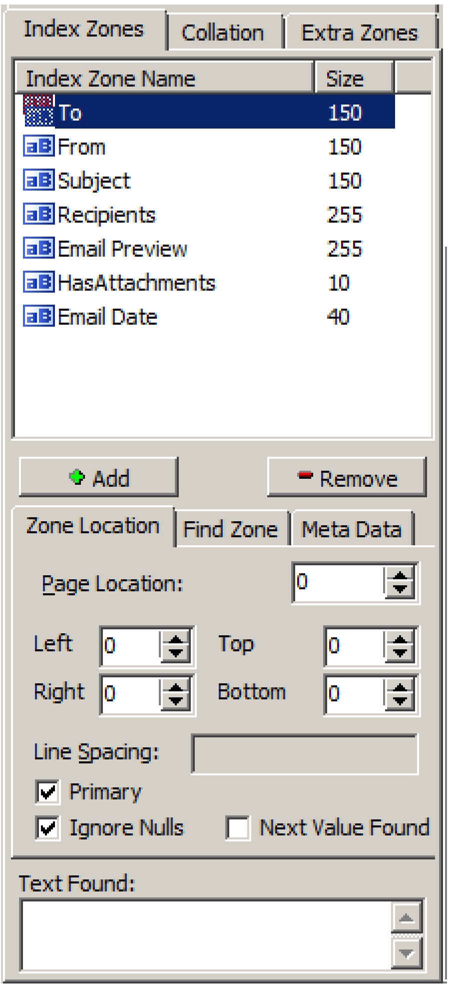


On the *Index Zones* tab as shown above, you will need to click the **Add** button to add all of the relevant indexes.

In the *Select Index* window, highlight an index and then hit **OK** to add it to the *Index Zones* tab. You will need to add all of the indexes in this fashion (click **Add** on the *Index Zones* tab, select an index in the *Select Index* window, and hit **OK**).



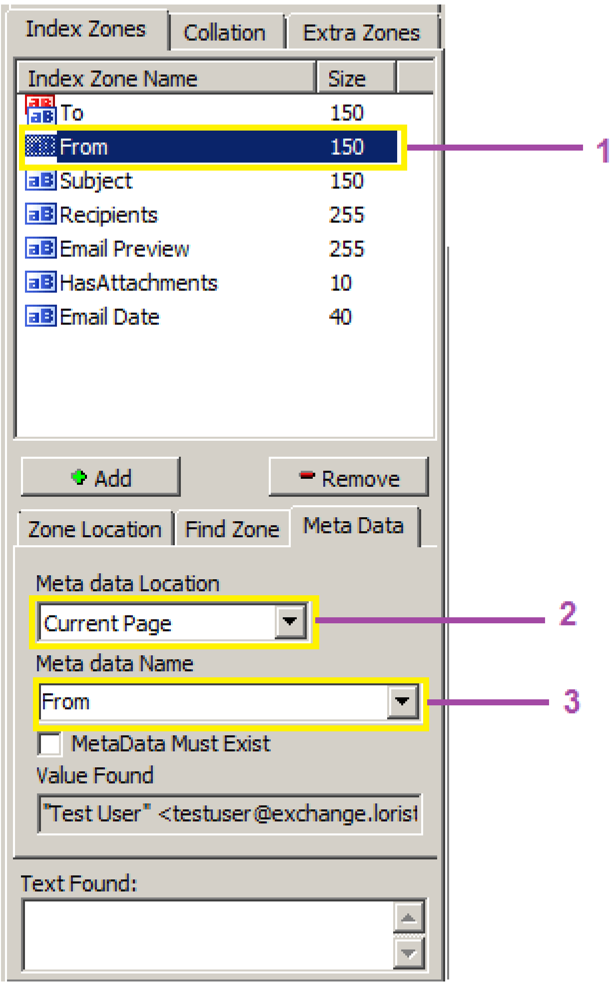
When you have finished adding your indexes, the *Index Zones* tab should look something like the following image.



The actual size of your indexes may vary, but the above are the standard indexes you would include for email archival.

Next, you will need to set how FileNexus will populate each of the indexes with values. In order to do so, you will need to click on the *Meta Data* tab in the bottom portion of the *Index Zones* tab.

The Meta Data tab

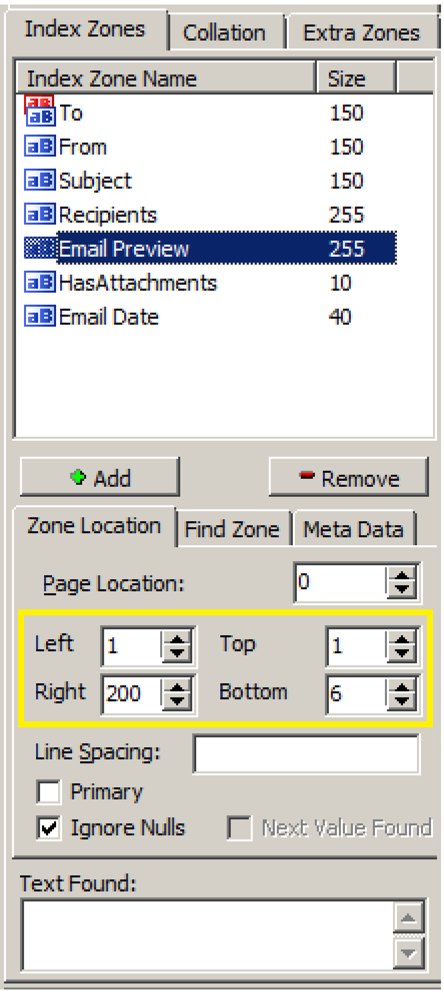


To set the value for each index, there are generally 3 steps.

1. Highlight the index
2. Change the Meta data Location drop down to "Current Page"
3. Select the Meta data Name from the drop down provided that corresponds to the index

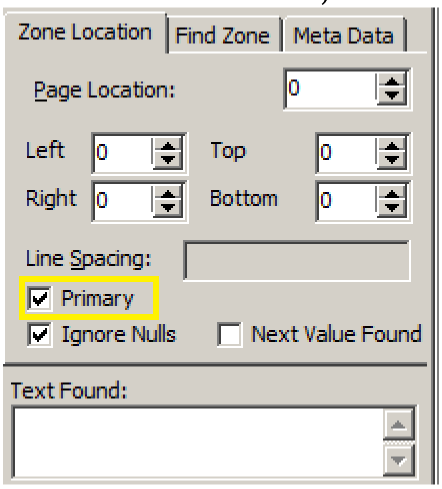
NOTE: For the *Recipients* and *HasAttachments* indexes, you may not find a corresponding value in the **Meta data Name** drop down. In these cases, simply key in the values. For example, for the *Recipients* index, key "Recipients" into the **Meta data Name** drop down.

For the *Email Preview* index, proceed to the *Zone Location* tab and enter the values 1, 1, 200, 6 in the **Left**, **Top**, **Right**, and **Bottom** edit boxes provided. See the following image.



This will capture the first 255 characters in the 6 first lines of the email as a sort of "Preview" of the body of the email.

Before you complete your configuration and save the .INI file, select the *To* index and on the *Zone Location* tab, check ON the checkbox for **Primary**.



Next, select *Save* or *Save As* from the ***File*** menu to save your settings.

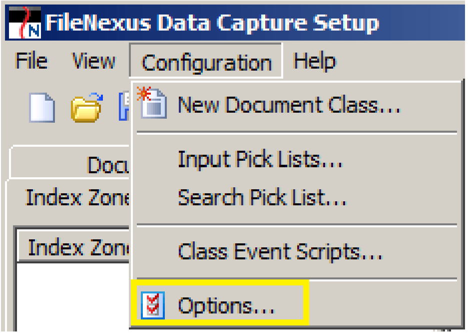
Now that you have set up your .INI file, you will need to configure an Email Capture Session to identify and archive your documents. Please see the section on Email Capture Management.

Overview

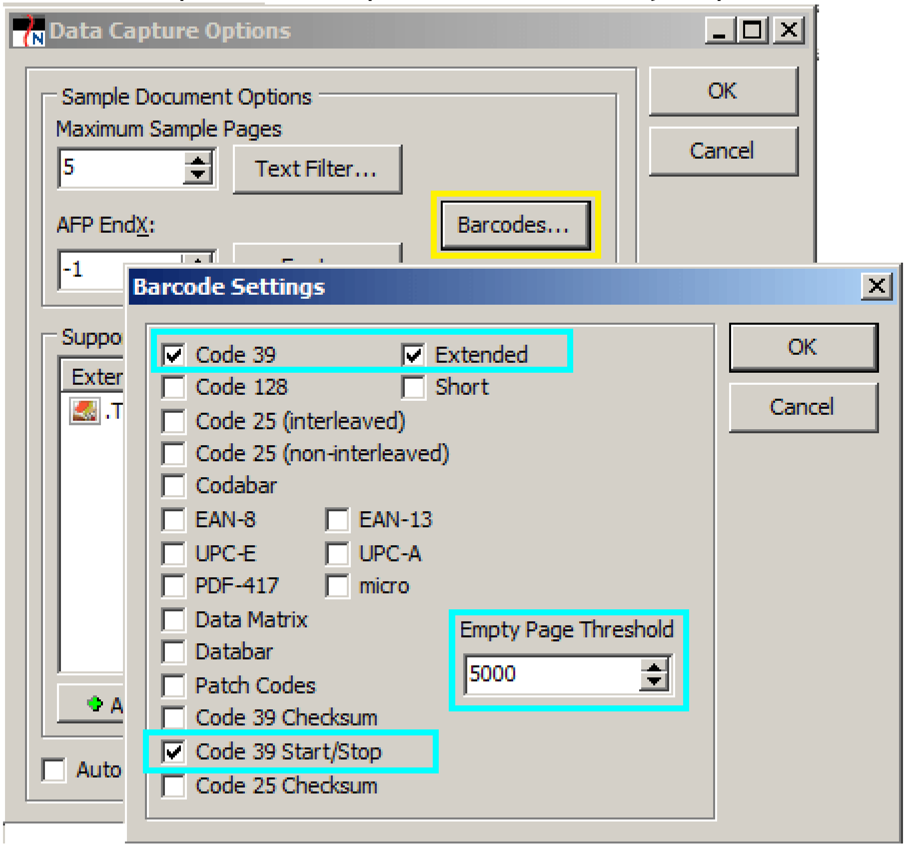
Since setting up an Image Capture .ini file is quite different from setting up Text and PDF Capture Setup files, the following section will elaborate on a sample setup for an organization's identification and archival of scanned Tiff images.

After you have chosen to create a new Image Capture Settings file (see the Creating a Data Capture Settings File section), you may have to set what type of barcode font will appear on your separator page, cover sheet, or on the first page of each multi-page document to be scanned. It is best to set the barcode options before opening your sample file.

To configure your barcode settings, select **Options** in the **Configuration** menu.

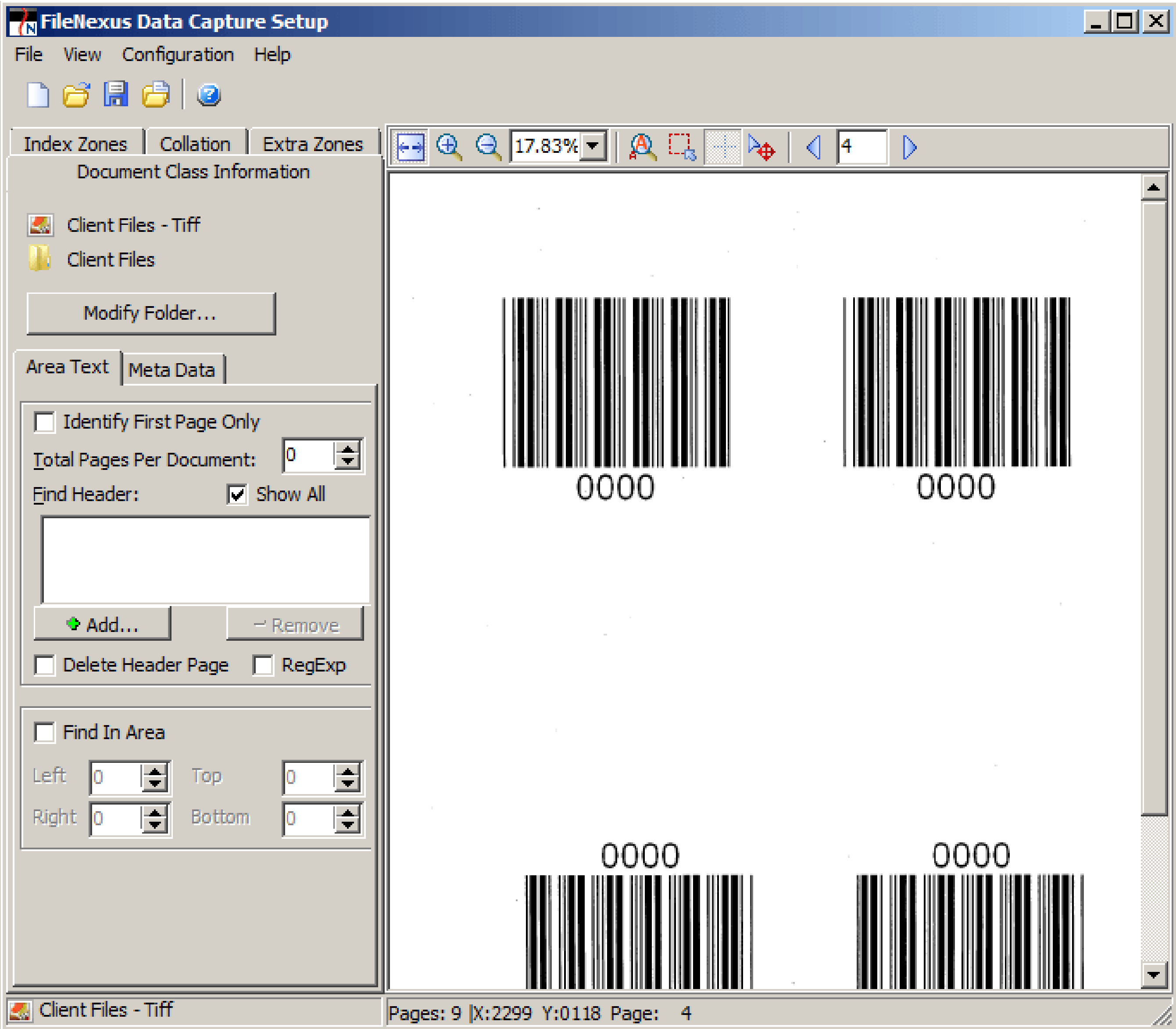


In the *Data Capture Options* window, click on **Barcodes…** to access the *Barcodes Settings* window. Then, place a checkmark beside the type of barcode font found on your documents (on the document or on the barcode separator pages). In the example below, the barcode is "Code 39" or Code 3 of 9. We've also checked on "Extended" and "Code 39 Start/Stop" as these options are commonly required for this type of font.



Use the **Empty Page Threshold** if you are scanning your documents in Duplex mode (double-sided). By entering the number of bytes in this edit box (5000 in our example), you are telling FileNexus to delete or ignore any pages (or backs of pages) that contain less than the set number of bytes. Hit **OK** to save your changes.

Next, you will want to open a sample .tif file that represents the types of documents you will scan. The image sample view maintains and displays a small sample of data one page at a time for fast and easy viewing analysis.



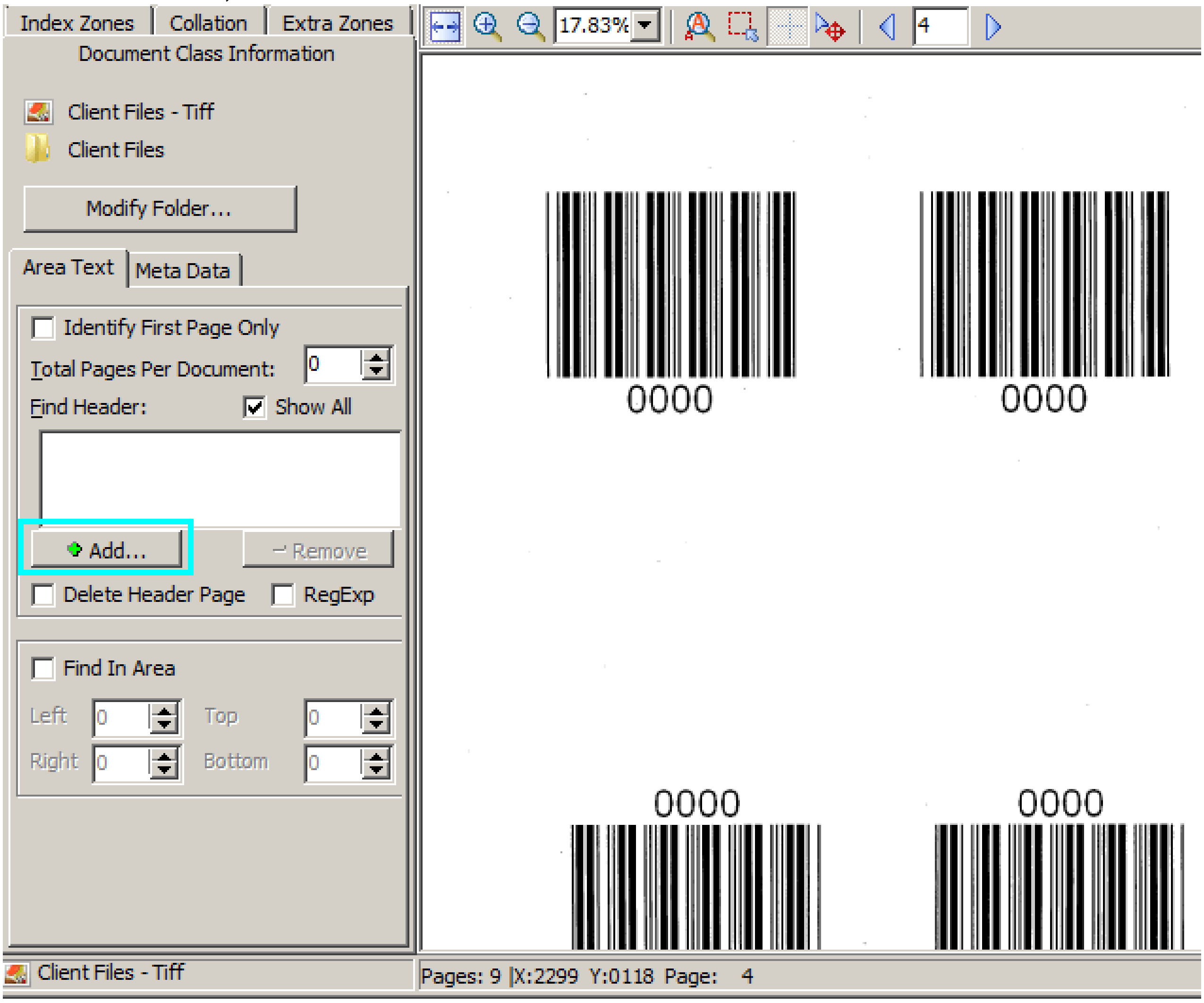
Loading a Sample Document

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 Tiff file.

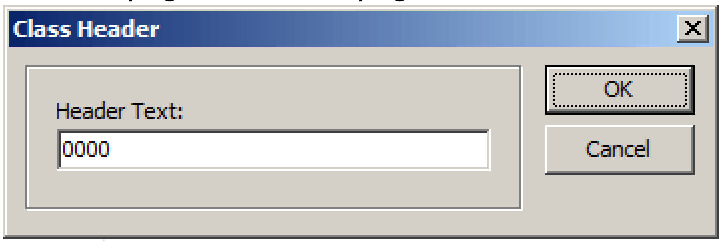
NOTE: The .tif file will be opened in a read only mode so no changes are possible to the original document. Also, because this is only a sample of the document only a preset number of pages (which can be modified in the *Filter Settings*) will be loaded.

If you are using barcode separator pages to separate documents scanned in a single batch, then your header may be “0000” if that is the value on your separator page.

To add a header, click on the Add button seen below.



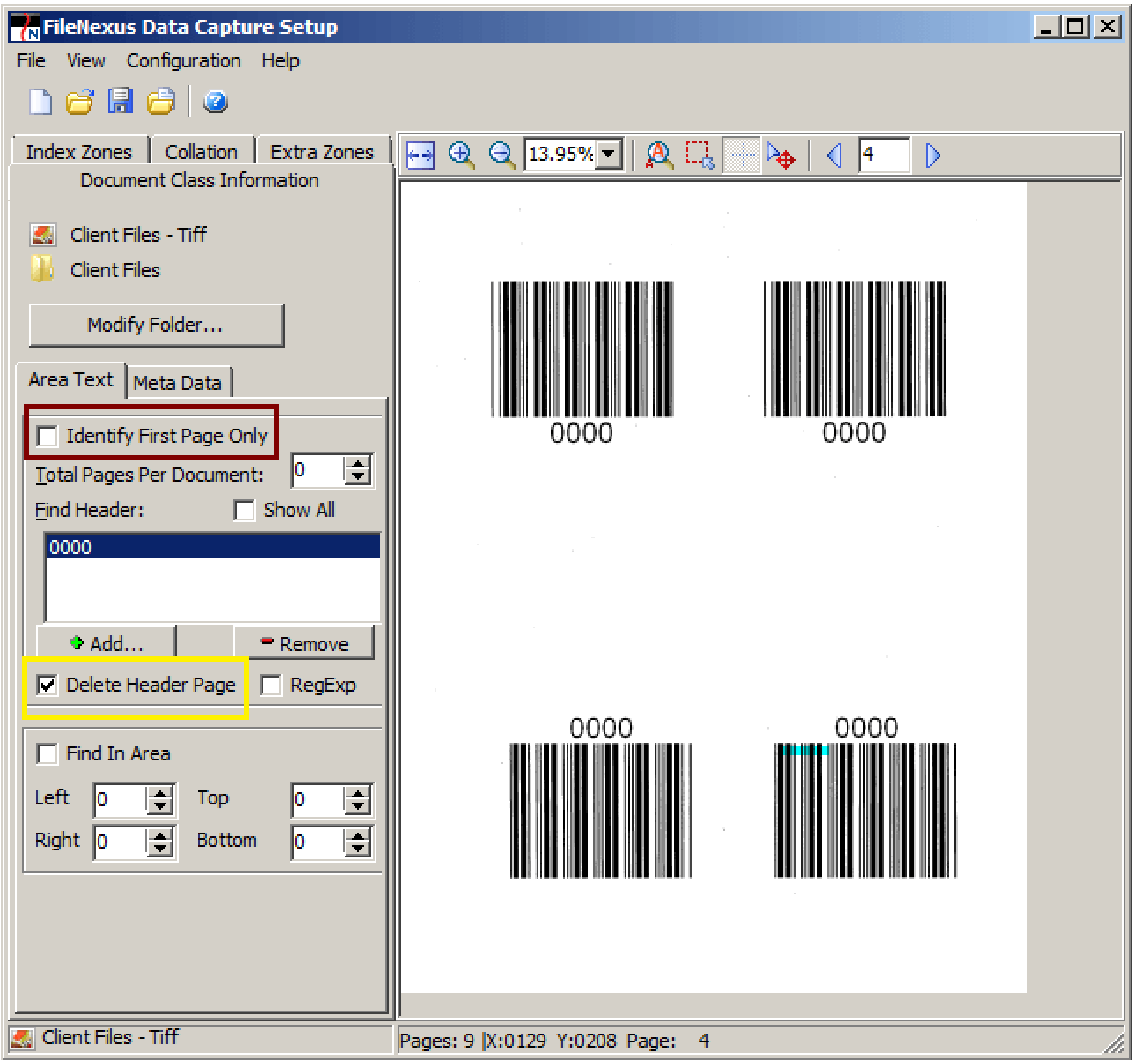
Next, enter the barcode value on the separator page or barcode value to search for on the first page of a multi-page document in the *Class Header* window and hit **OK**.



If you are using barcode separator sheets, be sure to check on “Delete Header Page”. This will ensure that the separator pages will not be saved with the individual documents.

If you are not using barcode separator sheets, but will use some sort of Cover Sheet that contains a consistent barcode value(s), then you may wish to check on “Identify First Page Only”. Then, FileNexus will know to not look for the same barcode value(s) on every page of the document, just the first page.

Like barcode separator pages, cover sheets will also ensure the individual documents will be correctly separated from within a single scanned batch of files. In the below example using barcode separator pages, “Delete Header Page” has been checked on.



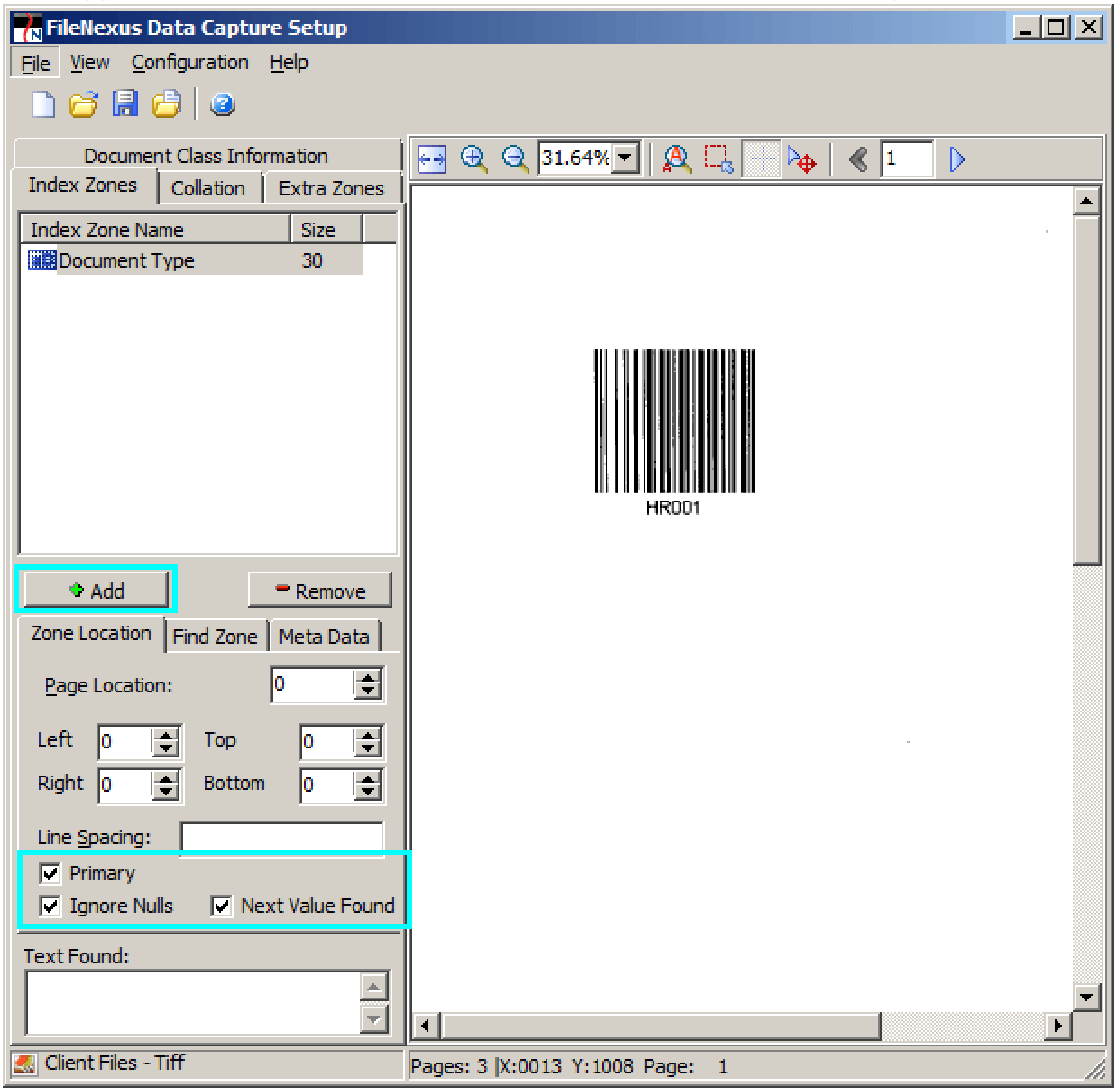
NOTE: You cannot check on both “Identify First Page Only” and “Delete Header Page”. They are mutually exclusive. Also, if your documents will have unique barcode values on the first page of each multi-page document within a scanned batch (i.e. you are not employing separator pages or cover sheets), you will not need to set any headers on the **Document Class Information** tab.

If employing barcodes on cover sheets or unique values on the first page of each multi-page document, you will need to proceed to the **Index Zones** tab to set index values.

Index Zones Tab

On the Index Zones tab, you can add any indexes in which barcode values should be populated and help define what are “valid” barcodes for your documents using Regular Expressions.

First, to add indexes to the capture setup file, click on the **Add** button and then highlight the index to add in the *Select Index* window that appears and hit **OK**. The index will then appear in the Index Zones tab as shown with the “Document Type” index below.



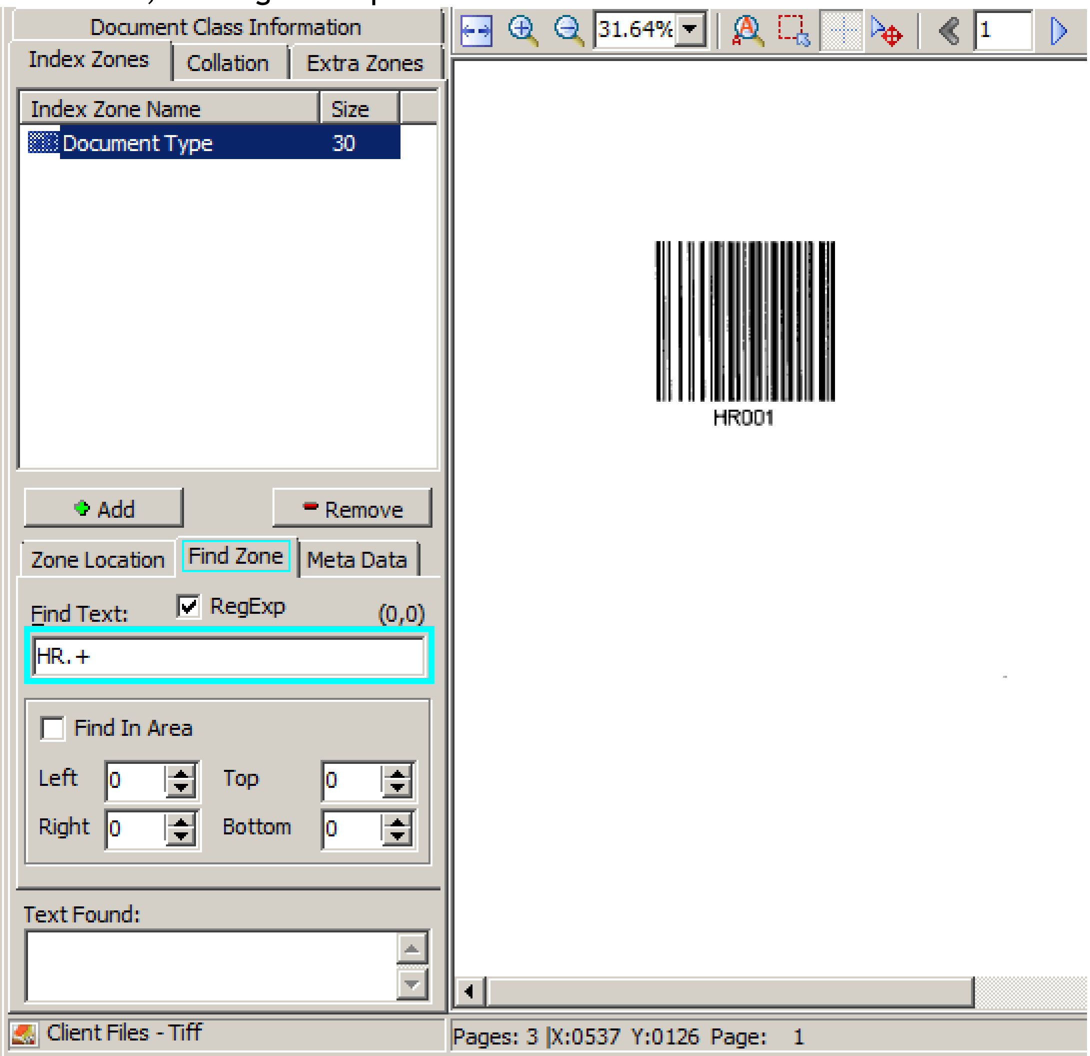
In the example above, the Document Type index should be populated with the barcode value shown; “HR001”. If this barcode will be used to separate documents (i.e. each time FileNexus encounters a new barcode, whether it is the same value or not, it will indicate the beginning of the next document), the **Primary**, **Ignore Nulls**, and **Next Value Found** checkboxes should be checked.

To help eliminate or ignore external barcodes that may not be relevant to the document scanning and archival process, you may use Regular Expressions. To do so, proceed to the *Find Zone* tab in the bottom half of the *Index Zones* tab.

The Find Zone Tab

On the Zone Location tab in the bottom pane of the Index Zones tab, you can define the types of barcode values FileNexus should search for, thereby ignoring other barcodes not using the specified syntax. To do this, you may employ Regular Expressions.

Highlighting the index in the upper pane, as shown below with the *Document Type* index, proceed to the Find Zone tab and check on RegExp for regular expressions. Enter the regular expression that corresponds to the syntax you will be using for barcode values on your documents. In the below example, if I want to only read in barcodes that begin with “HR”, the regular expression used is “HR.+”.



The entered Regular Expression above will match the entire barcode value shown; HR001. If I wanted to ensure that FileNexus would only recognize barcodes beginning with HR but strip off the HR before populating the index value, the Regular Expression would be “[^HR].+” instead of “HR.+”.

Some Common Regular Expressions

.	Refers to a single character (include a single character)
+	Matches the previous character 1 or more times
^	Start of line or begins with the character(s) that follow

After you have completed adding indexes and setting their values with the use of Regular Expressions, be sure to save your capture setup .ini file before exiting the program.

For more information on Regular Expressions, you may refer to: http://www.addedbytes.com/download/regular-expressions-cheat-sheet-v2/pdf/ or contact Loris Technical support at support@loristech.com.

Overview

In the *FileNexus Client* and *Web Client*, in addition to the archival of a document, certain actions on an archived document such as the update of an Index value, moving a document between folders, or adding a Note/Annotation to a document, qualify as "Events" or triggers that can prompt the execution of a business rule to support your existing Workflows.

FileNexus Events

- Updating the index value(s) of an archived document
- Moving an archived document from one folder to another
- Adding a Note/Annotation to an archived document
- Button Event – *available on Web Client only*

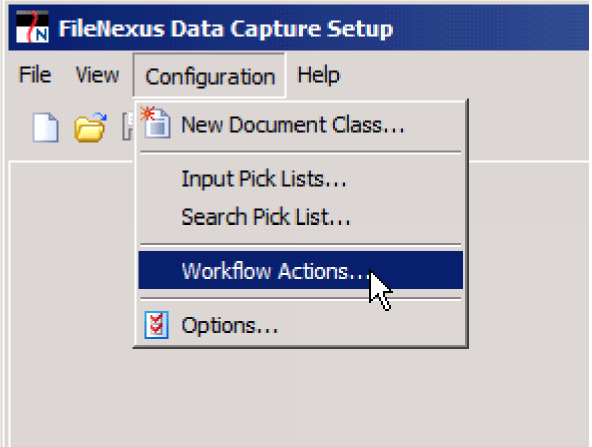
The business rules or *Workflow* processes are executed automatically by FileNexus by the use of Event Scripts (VB Scripting) that automatically execute based on one of the events as mentioned above. Business rules or Workflow processes may include but are not limited to:

- An email notification being sent to one or more parties, with or without links to the documents in FileNexus
- Documents being moved from one folder to another
- The automatic update of indexes on related documents
- The automatic update of host systems
- Automating document routing or assignment

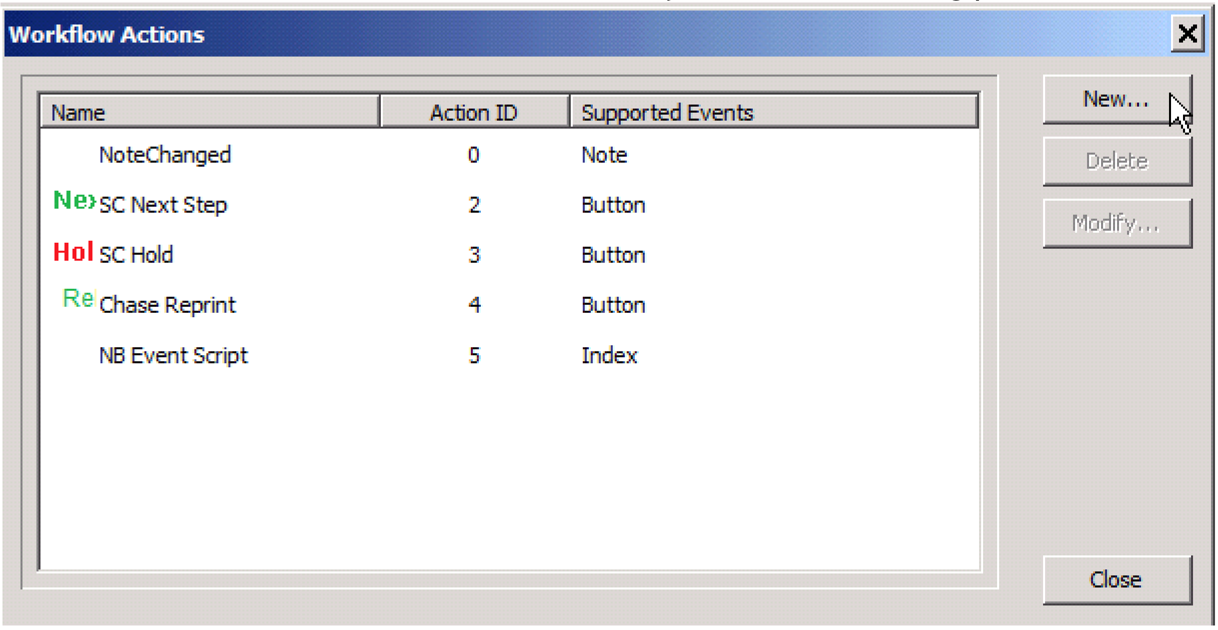
If you currently employ workflow processes in your business, FileNexus Workflow can help you reduce paper, increase productivity, and improve staff synergies.

New Workflow Action Dialog Box

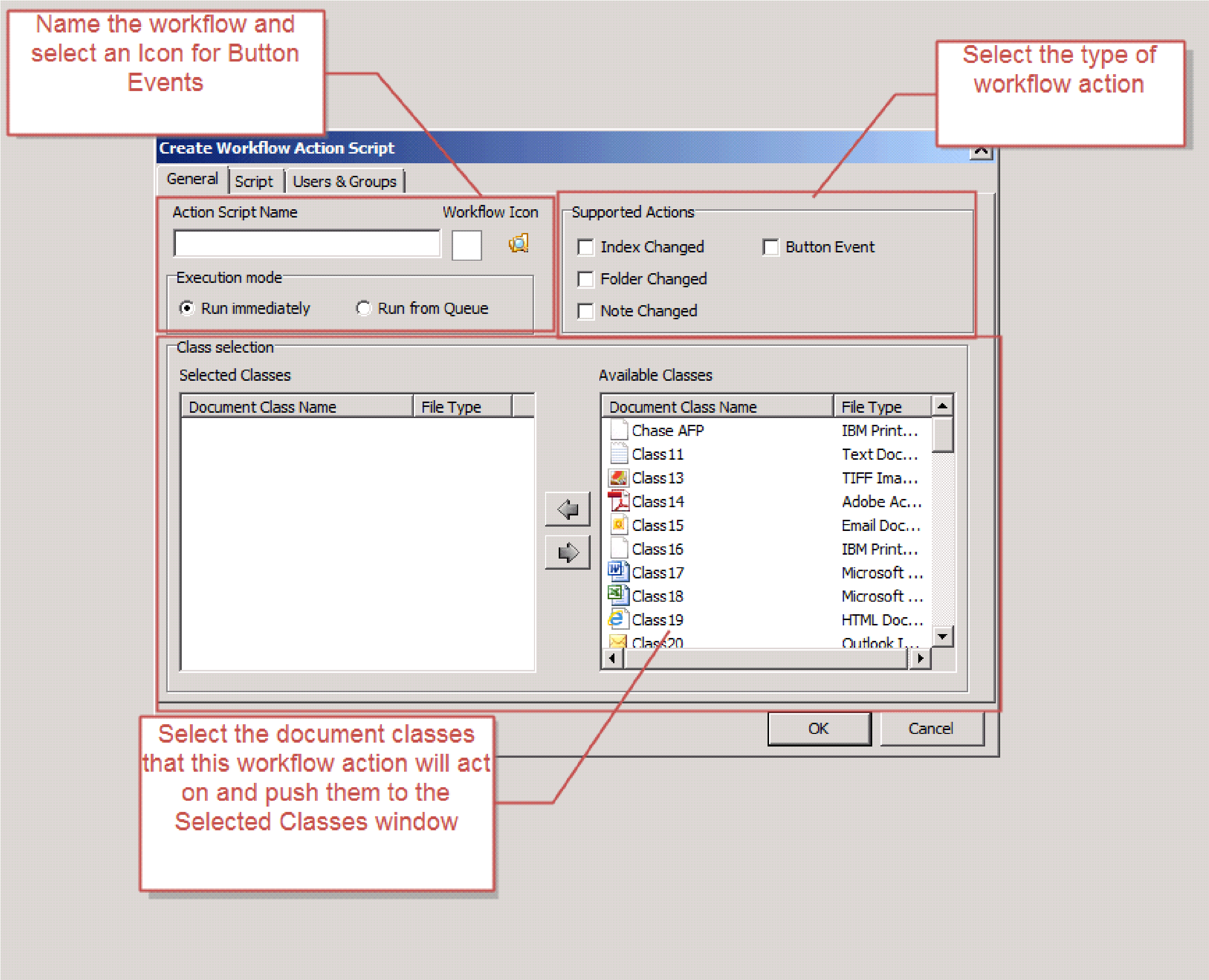
From the FileNexus Data Capture Setup menu, select WorkFlow Actions



Select New to create a new workflow or Modify to alter an existing process.



In the Create Workflow Action Script dialog box fill in the details of this workflow:



Action Script Name – give a name to the workflow process
Workflow Icon – for Button Event workflow, select an icon that will be displayed on the FileNexus Web Client screen to initiate the action.
Execution Mode – determines when the script will execute

- **Run Immediately** – the script will execute in real time
- **Run from Queue** – the script will execute in batch mode

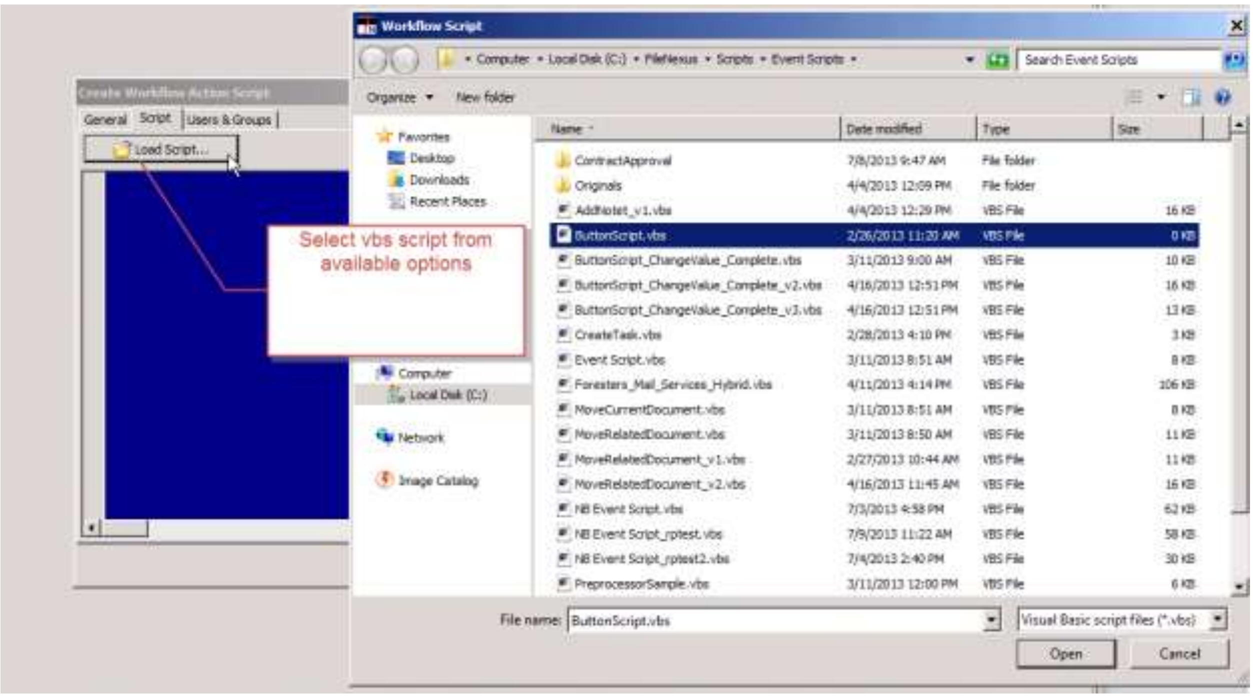
Supported Actions:

Index changed – this action will fire when a document index is updated
Folder Changed – this action will fire when a document is moved from one folder to another
Note Changed – this action will fire when a Notatioon is added to a document
Button Event – this action will fire whenever the button is pressed. The action will apply to the select document(s).

Class Selection
This allows you to select with document classes the workflow script will apply to. The workflow event trigger will be fired in all cases but the script action will only execute when the chosen document classes are involved in the action.

Script Tab

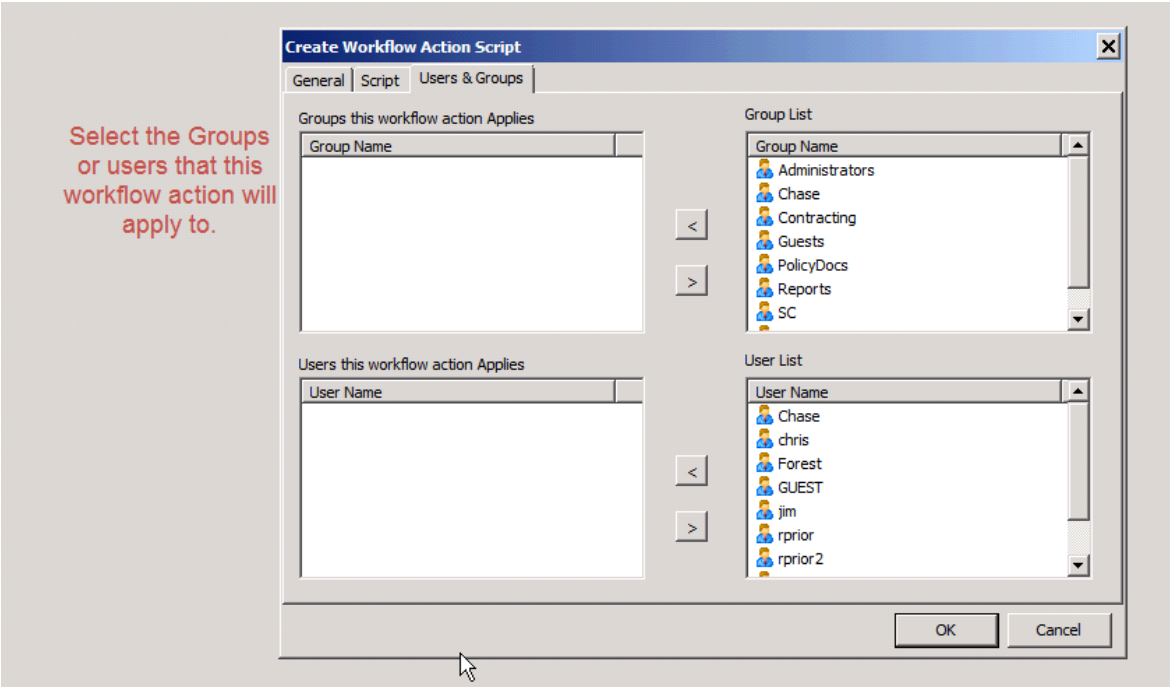
Select the specific vbs script that will execute the required business logic for the workflow action.



Users & Groups Tab

The workflow actions can be targeted to specific users or security groups so that the business logic will only apply to those users. The Index Changed, Folder Changed and Note Changed actions will trigger for all actions but the business logic will only apply if the user initating the action is included in the set up. Similarly, a Button Event will only display the related button icon for users that are included in the set up.

To add users or security groups, select the id from the right pane and use the arrows to move in or out of the left pane.



FileNexus Management

The **FileNexus Management** context menu available by right-clicking on the FileNexus Management icon in the Windows System Tray provides FileNexus Administrators several system management tools for the FileNexus.

FileNexus Server Properties
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting FileNexus Server Properties will open up the Server Properties window.

Archive Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Archive Management will open up the Archive Management window.

PFD Capture Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting PDF Capture Management will open up the PDF Capture Management window.

Image Capture Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Image Capture Management will open up the Image Capture Management window.

AFP Capture Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting AFP Capture Management will open up the AFP Capture Management window.

Text Capture Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Text Capture Management will open up the Text Capture Management window.

Email Capture Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Email Capture Management will open up the Email Capture Management window.

Preprocessor Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Preprocessor Management will open up the Preprocessor Management window.

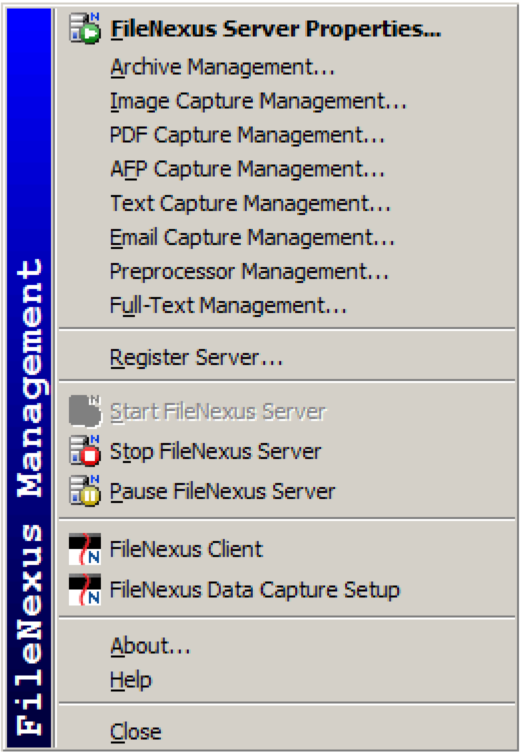
Full-Text Management
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Full-Text Management will open up the Full-Text Management window.

Register Server
Right-clicking on the FileNexus Manager icon in your Windows system tray and selecting Register Server will open up the Register FileNexus Server window.

Starting, Stopping and Pausing FileNexus
Please see Starting, Stopping and Pausing FileNexus

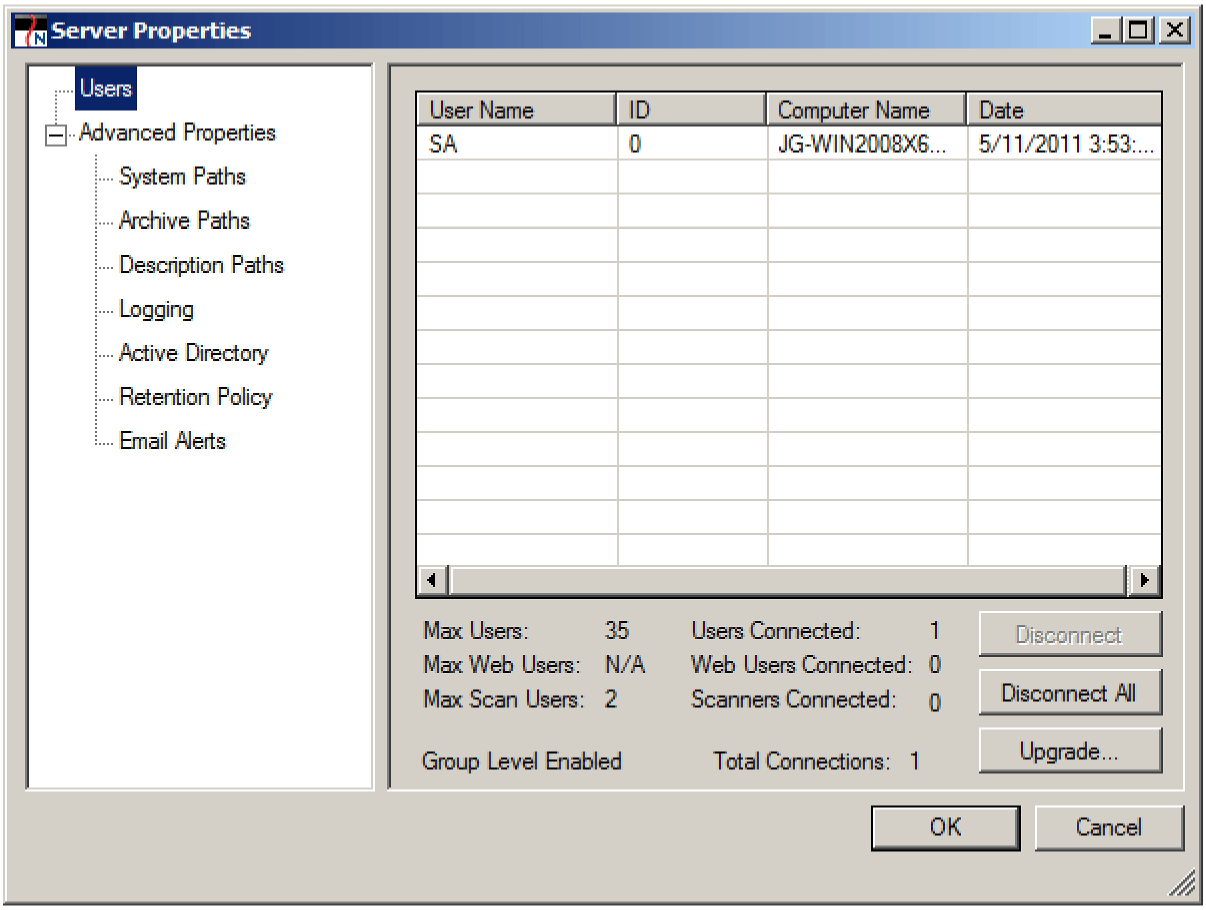
Overview

The FileNexus Server Properties window is a tool that allows administrators to manage certain aspects of the FileNexus system. To access the FileNexus Server Properties window, you can right-click on the FileNexus Management icon in your system tray (on the FileNexus Server) and select **FileNexus Server Properties** at the top of the list.



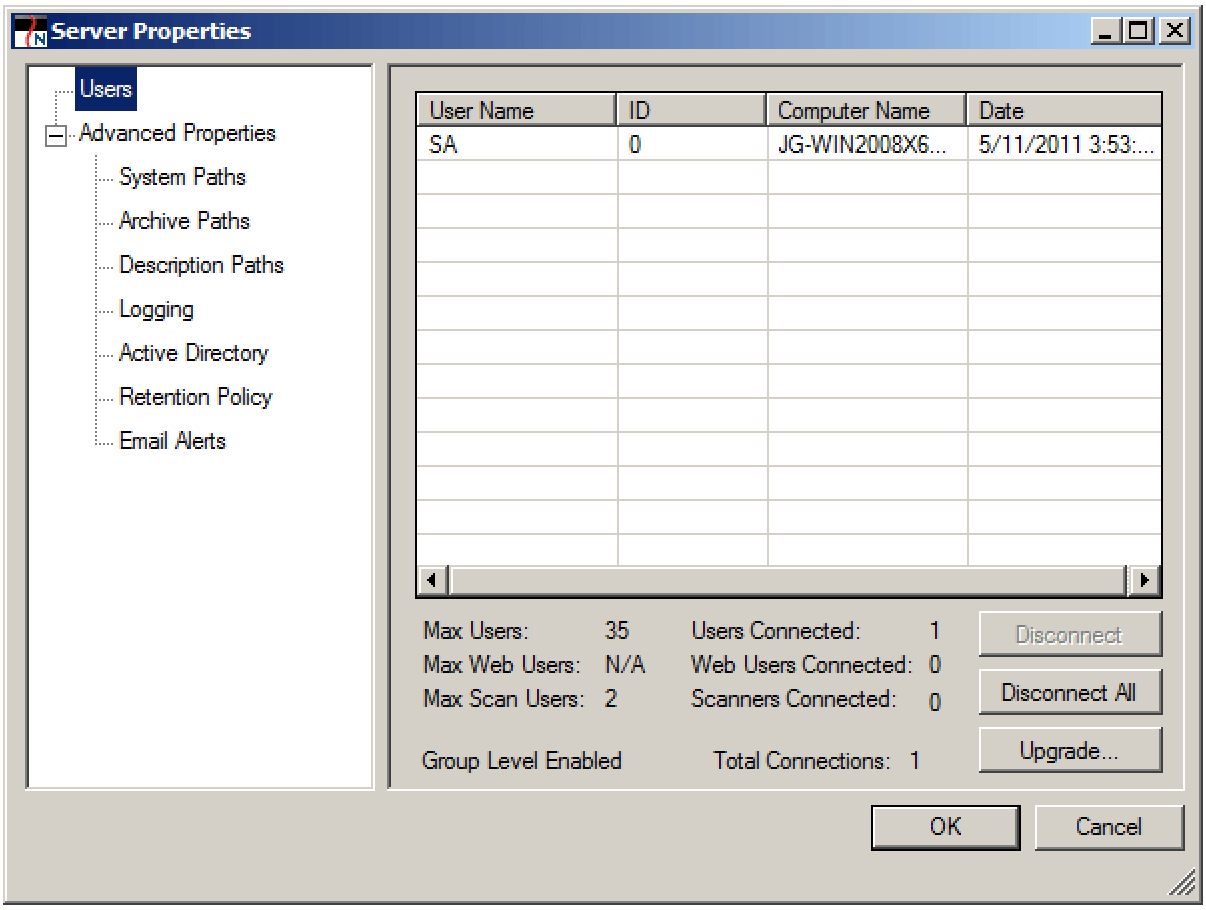
The various settings and information available to you include Users, System Paths, Archive Paths, Logging, Active Directory, and Email Alerts.

By default, the **Server Properties** dialog will display the **Users** pane, displaying any users currently connected to the FileNexus system. From this pane, you can verify the number of User connections next to the **Users Connected** label (this number reflects the number of Concurrent Licenses currently being used), the number of Concurrent Licenses to which your organization is entitled (**Allowable Users**), and the total number of connections to the FileNexus system (**Total Connections**).



Users Pane Overview

The **Users** pane allows you to see the name of every user and computer logged into FileNexus. This screen also shows you the total number of users connected to your FileNexus server and the maximum users that you are licensed for. From this screen, it is also possible to disconnect individual users or all FileNexus users by clicking on the appropriate button.

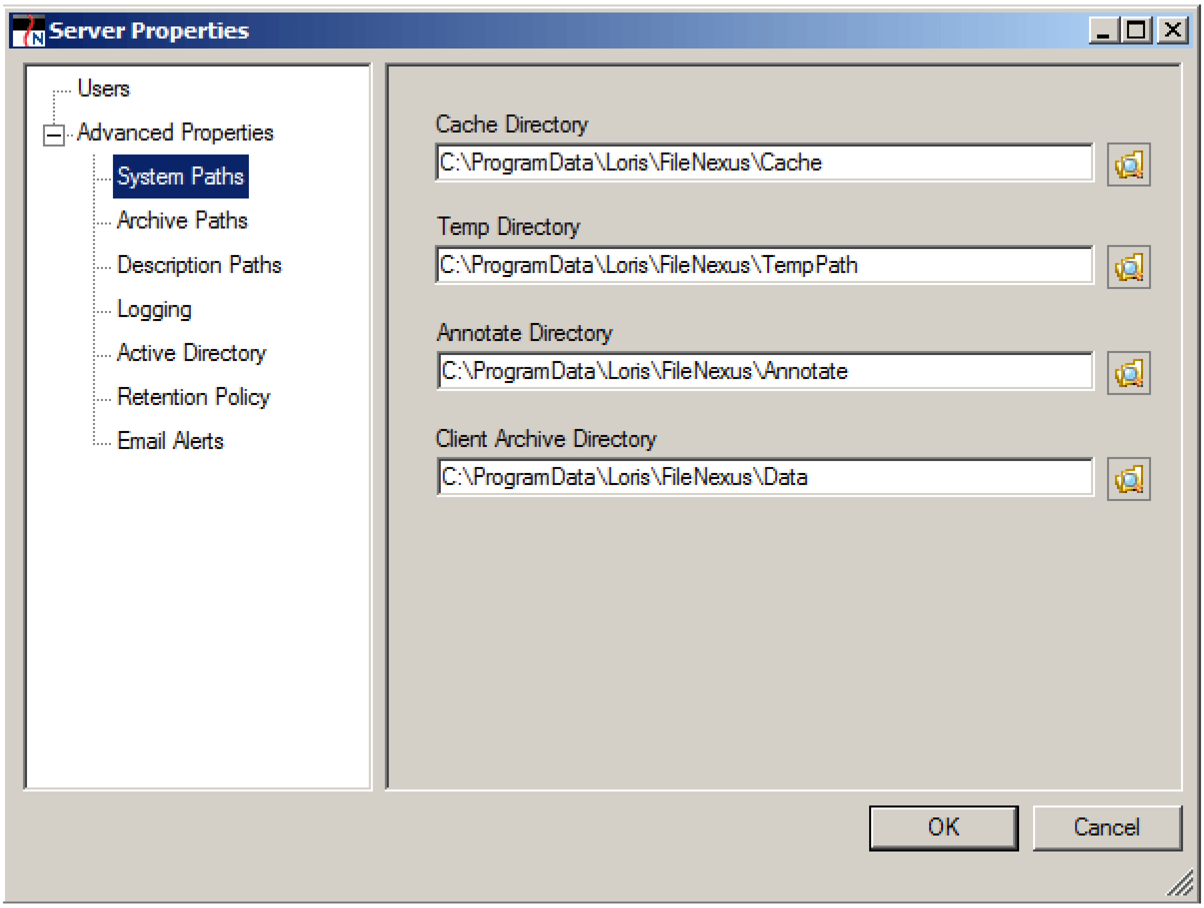


Disconnect
Clicking on this button will disconnect the currently selected User in the User list.

Disconnect All
Clicking on this button will disconnect all users from the FileNexus System. Be sure to let users know that you will be disconnecting them prior to exercising this feature.

System Paths

To access the **System Paths**, select the System Paths item in the left pane of the **Server Properties** window.



Cache Directory
Each time FileNexus retrieves a document from an archival file, the file is uncompressed and placed into the cache directory. Files in the cache directory are then sent to the requesting PC.

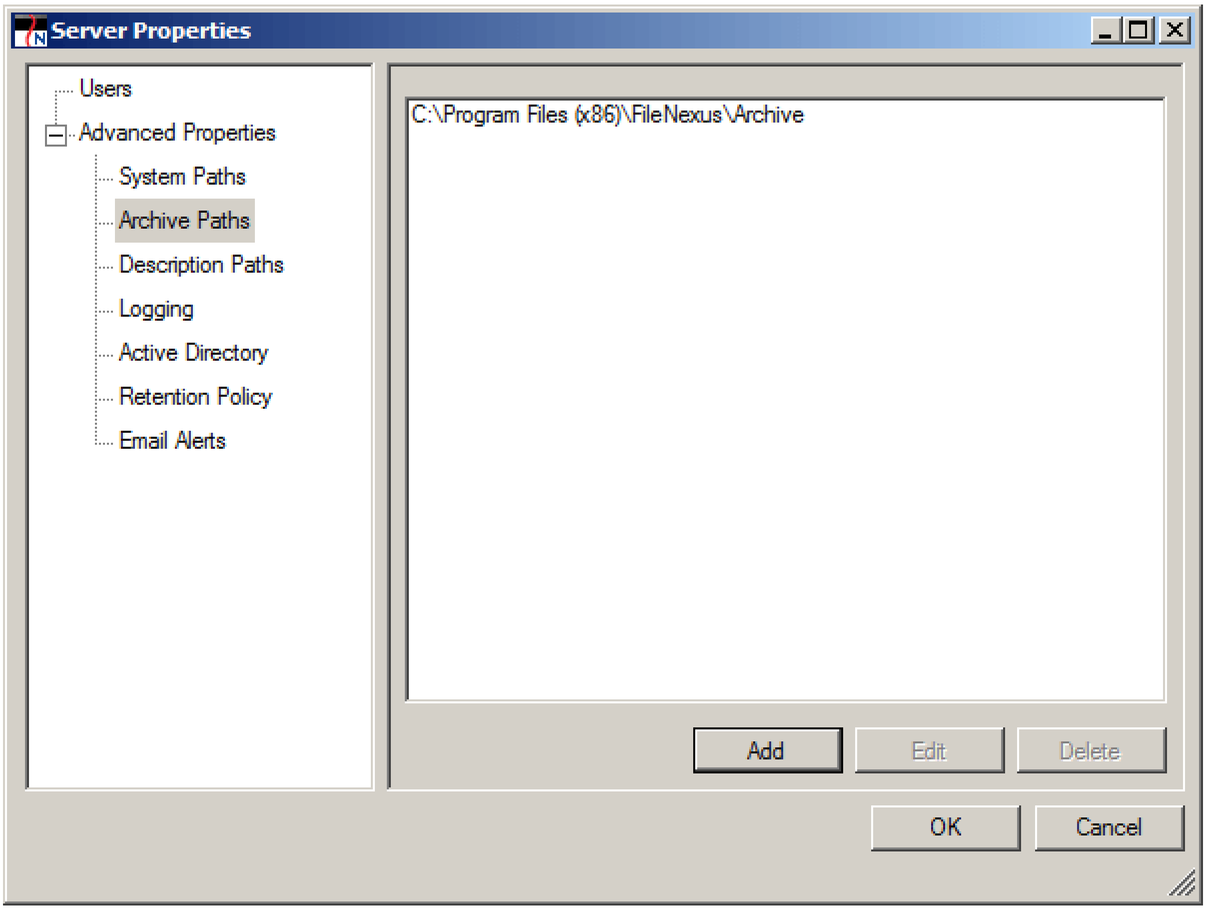
Temp Directory
Used for temporary files created by FileNexus applications and Web Services.

Annotate directory
This is the directory where FileNexus stores notes that have been added to documents. **Be sure to back-up this directory.**

Client Archive directory
The **FileNexus Client Archiver** program (used to archive any PC documents) sends PC files and their associated indexes (.NXS file) to this directory. This directory must be monitored by an Archive Session (automatically running or manually started by an administrator) so that files placed into it are archived and made available in the FileNexus Client.

Archive Paths

To access the **Archive Paths**, select the Archive Paths item in the left pane of the **Server Properties** window.



The **Archive Paths** pane must include all of the paths to the directories that contain your archive (.FAR) files.

Add
To add a path, click on the **Add** button. Browse to the directory in the **Browse for Folder** window containing your archive files and hit **OK**.

Edit
To change an existing path, click on the Edit button and browse to the correct directory in the **Browse for Folder** window containing your archive files and hit **OK**.

Delete
To remove an existing path, highlight it and click on the **Delete** button.

OK – Will exit you from the Server Properties window saving any changes made.

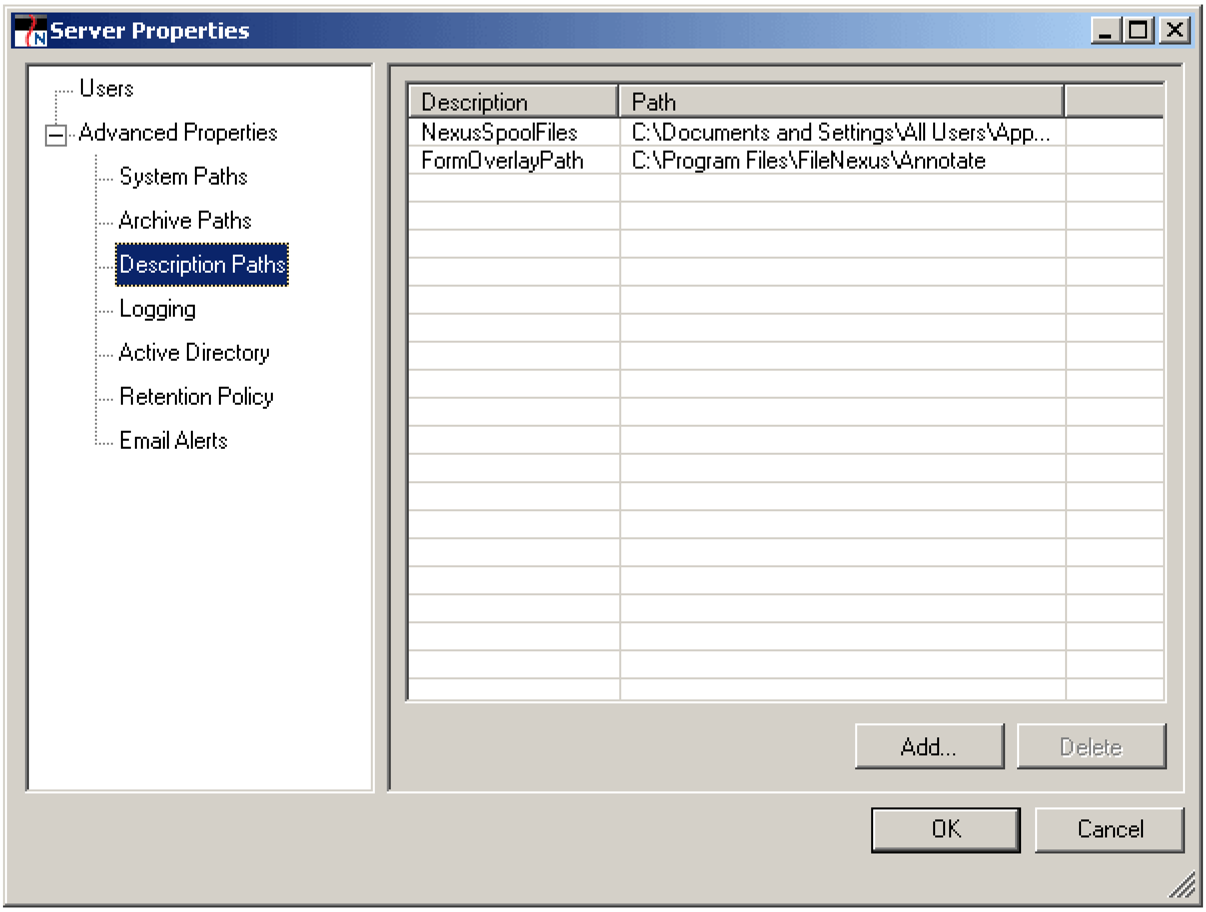
Cancel – Will exit you from the Server Properties window without saving any changes you have made.

Overview

Description Paths are defined network paths accessible from the FileNexus Server that help FileNexus Administrators manage documents on their way to being archived to the FileNexus System. These paths may be used by such FileNexus Applications as the FileNexus Client Archiver, and FileNexus File Transfer Program to name a few. By employing a defined “Description” name, users can send documents to be archived to folders on a FileNexus Server that are not shared, helping to maintain network security.

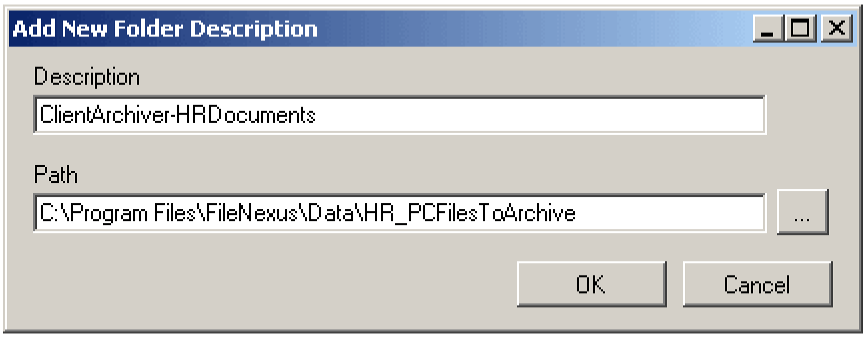
Setting Up A Description Path

To access the *Description Paths* pane, select the *Description Paths* item in the left pane of the **Server Properties** window.



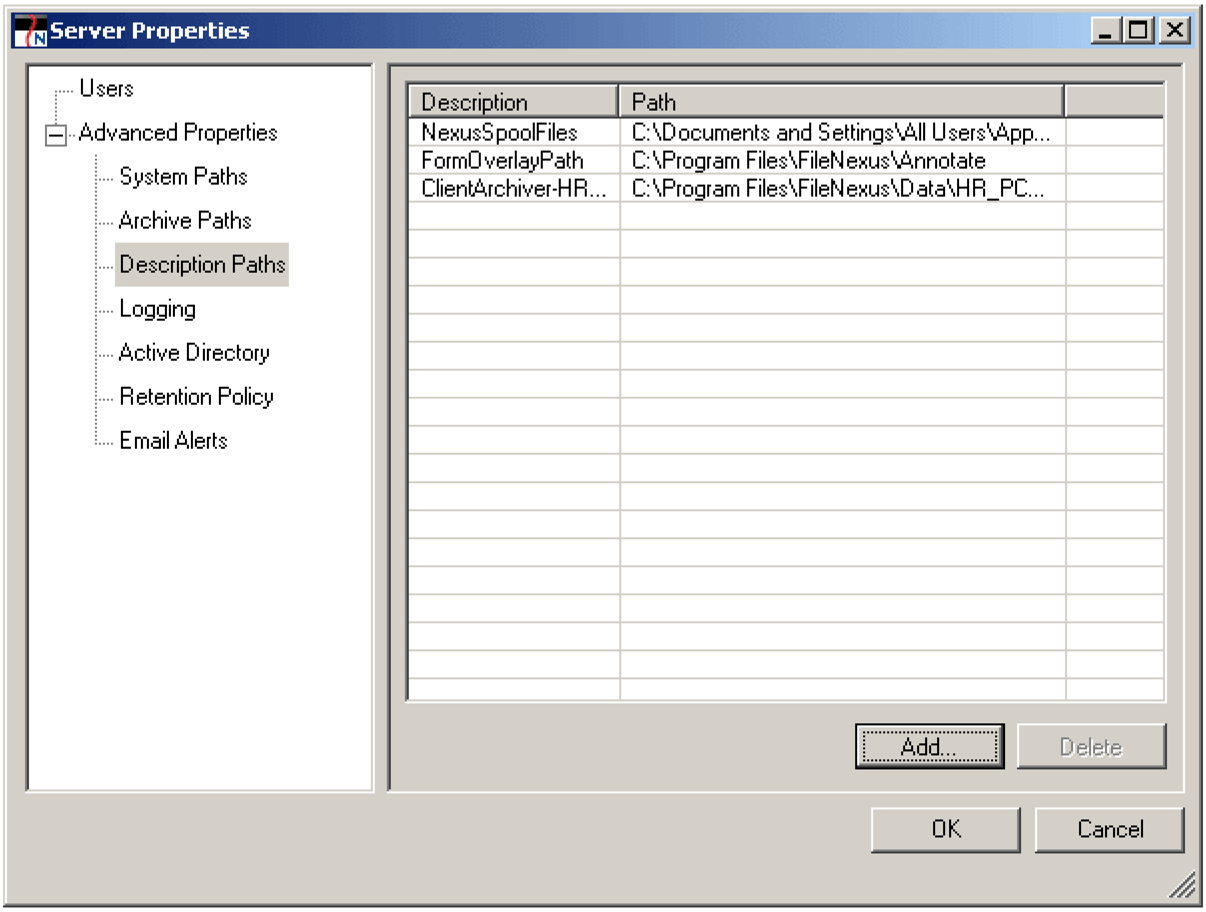
To create a new *Description Path*, click the **Add** button to have the *Add New Folder Description* window appear.

In the *Description* edit box, enter a unique description name that will represent a path on the FileNexus Server. Be sure to make it meaningful to the intent of the directory being referenced. In the below example, the Description name includes the type of documents that will be routed to the directory, “HRDocuments”, and the application from which the documents will be routed, “ClientArchiver”.



In the *Path* edit box, enter the full path to the directory on the FileNexus Server to be represented by the Description name. You can use the … button to browse to the directory.

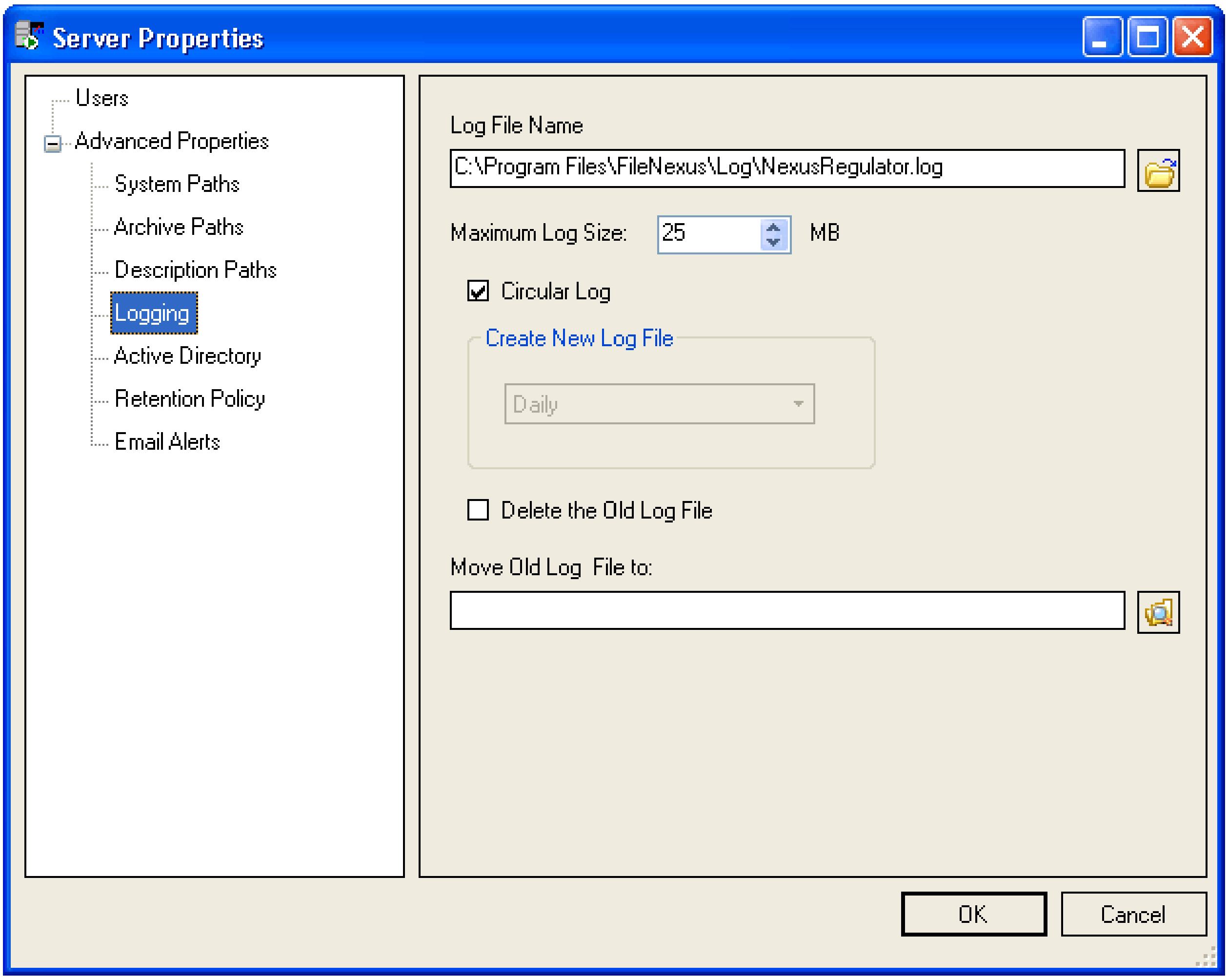
When finished, hit **OK** to save your changes or **Cancel** to ignore your changes. You will then return to the *Description Paths* pane of the *Server Properties* window to verify the *Description Paths* you have set up.



If you need delete an existing *Description Path*, simply highlight it in the right-hand pane and click **Delete**.

Logging Pane

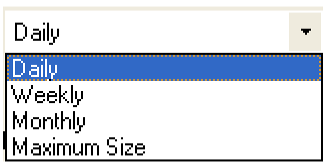
To access the FileNexus Server log settings, you must select the **Logging** item in the left pane of the **Server Properties** window.



There are two ways you can rotate your log files.

Maximum Log Size (Circular Log should be checked ON)
Sets the maximum threshold for the log file size. A circular log will begin to be overwritten once the threshold is met.

Create New Log File (Circular Log should be unchecked)
Selecting the period for which a new log should be created, **Monthly** for example, means that each month FileNexus will create a new Server log file.



Delete the Old Log File – When checked ON, will automatically delete old log files.

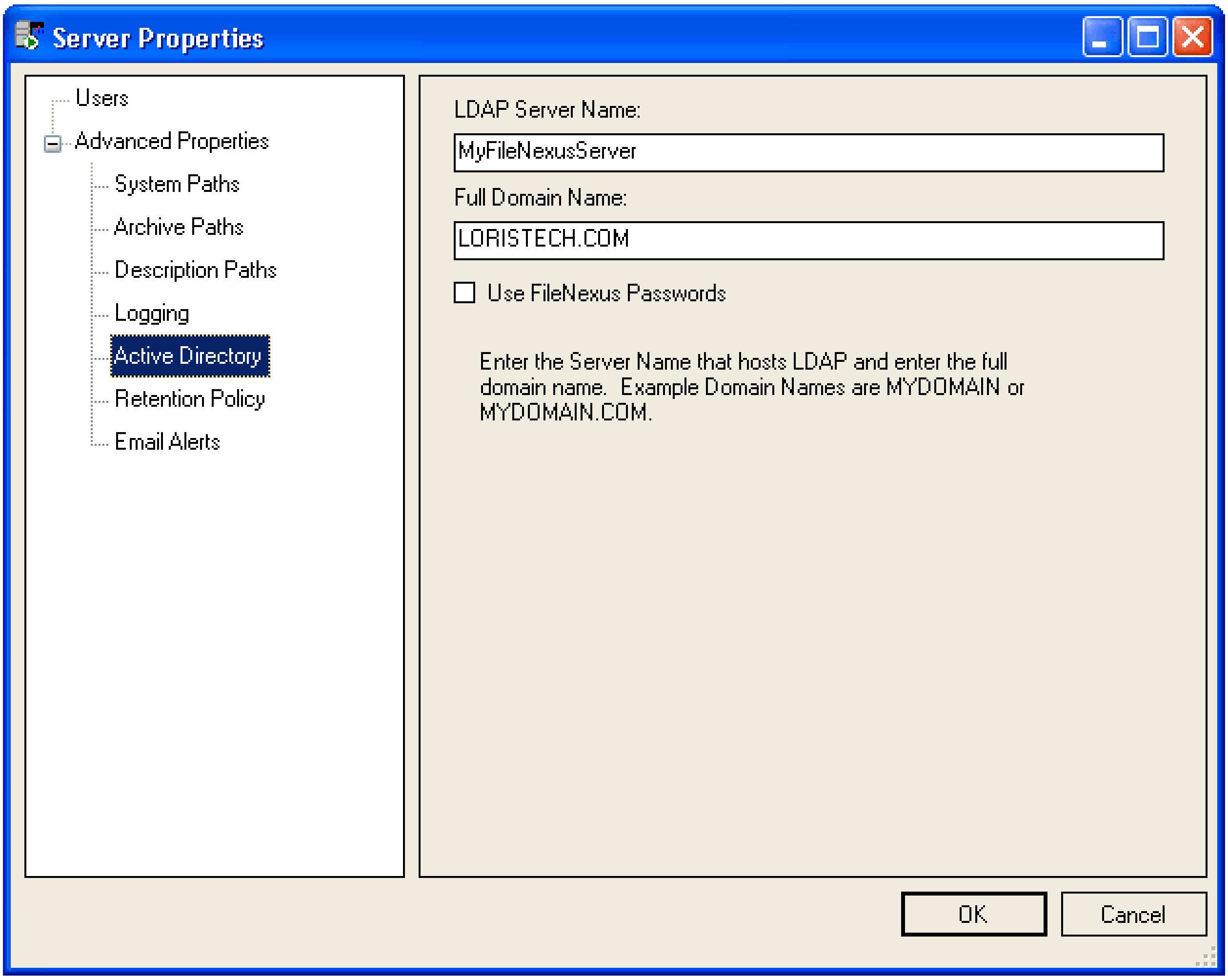
Move Old Log File to – Allows you to specify a directory in which to save old log files.

Overview

When managing FileNexus users, you may choose to authenticate user logins based on user profiles in your Domain Controller. FileNexus supports LDAP/Active Directory user authentication.

The advantage of this is that you would only have to manage users in one place, on the Domain Controller side rather than in the Domain Controller as well as in FileNexus. Once a user is set up in FileNexus, their passwords can effectively be ignored, and FileNexus will rely on Domain Controller based authentication. For more information on FileNexus vs. Domain users, refer to the section on FileNexus Users and Domain Users.

In order for FileNexus to work in conjunction with LDAP services, some registry settings must be configured. The front end to editing these settings can be accessed by selecting the **Active Directory** item in the left pane of the **Server Properties** window.



LDAP Server Name
Enter the name or IP address of the remote server that has Active Directory Services installed.

Full Domain Name
Enter the name of the Active Directory domain; for example, if your domain is called LORISTECH.COM and your users are set up with fully qualified domain user names like jsmith@loristech.com, the value of the **Full Domain Name** must be "@LORISTECH.COM". If the remote server uses Domain Security and not Active Directory security the server name must contain a back slash "\". For example, if the domain is called LORISDOMAIN, then the value of **Full Domain Name** must be "LORISDOMAIN\".

Use FileNexus Passwords
If this checkbox is unchecked, any FileNexus Passwords will be disabled and you will be able to use Active Directory or LDAP authentication. When checked, FileNexus will rely on user passwords setup in the FileNexus system.

IMPORTANT: After you have made changes to any or all of Active Directory settings in the FileNexus Server Properties, you must stop and restart the FileNexus Server Management in order for the changes to take effect. You DO NOT need to reboot the Server that FileNexus is running on, simply right-click on the FileNexus Management icon and select **Stop FileNexus Server** and then right-click on it again to select **Start FileNexus Server**.

NOTE: When you stop the FileNexus Server any users logged into FileNexus will lose their connection so you may wish to restart FileNexus after business hours or when you are certain no one is on the system.

FileNexus and Domain users

In order for FileNexus to use Domain user authentication, FileNexus users must be first exist on the Domain Controller with the same login name. The passwords do not have to be the same on the Domain side as in FileNexus, but some companies like to set them the same.

The important point to remember is that if a user is removed from the Domain, they will no longer be able to access FileNexus. Conversely, if a user exists in the Domain, but not in FileNexus, they will not be able to access FileNexus.

However, if the user's password changes on the Domain Controller, it needs only to be changed once. The FileNexus password set for a particular user will be ignored during the authentication process, and the password as set in the Domain Controller will be the only verified during the login to FileNexus.

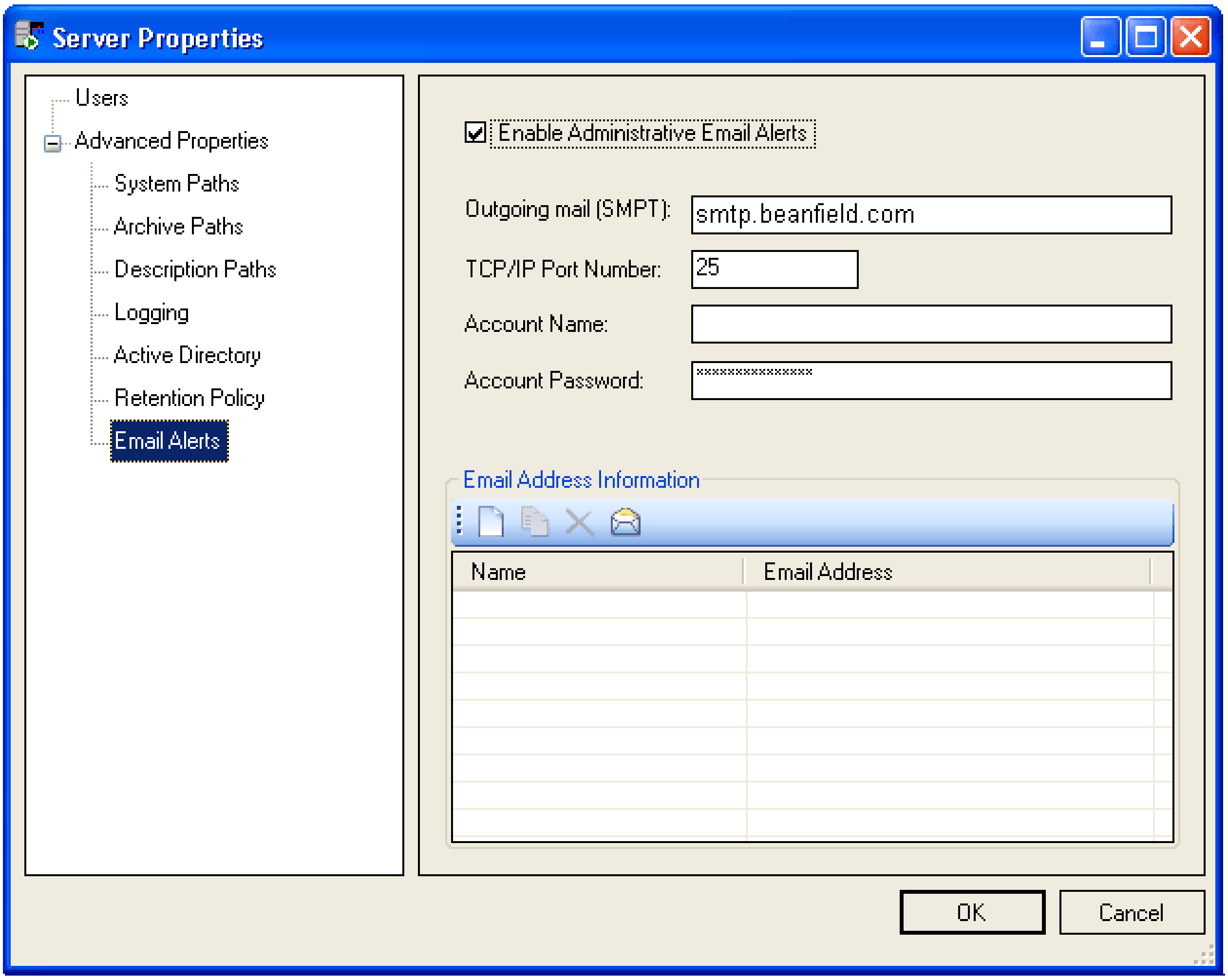
For more information on creating users in FileNexus, see User Administration.

Retention Policy

Please contact Loris Technologies for information on setting up Retention Policies for your organization.

E-Mail Alerts

To access the Email Alerts pane, you must select the **Email Alerts** item in the left pane of the **Server Properties** window.



FileNexus can be set up so that it notifies via e-mail one or more administrators in the event that the server, Auto Archive service, or Capture Services encounter an error.

To Enable Email Alerts:

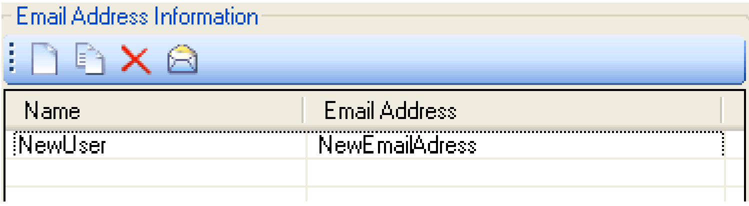
1. Put a check mark the Enable Administrative Email Alerts checkbox.

2. Enter the name of your outgoing SMTP server and its port number (usually 25).

3. If necessary, enter your account name and password.

4. Click on the **Add** icon .

5. Double-click on the NewUser text in the Name column to enter the user’s name and then do the same to edit the user’s email address.



6. Repeat steps 4 and 5 until all FileNexus Administrators to whom email notifications should be sent have been added as contacts.

7. Click on the **Send Test Email** icon to verify that your settings are correct.

8. Click **OK** to finish and accept your changes.

Add New Contact
Creates a NewUser and NewEmailAddress contact line that can be edited with a FileNexus Administrator’s name and email address.

Duplicate Contact
Copies an existing contact and adds it to the list of contacts to notify.

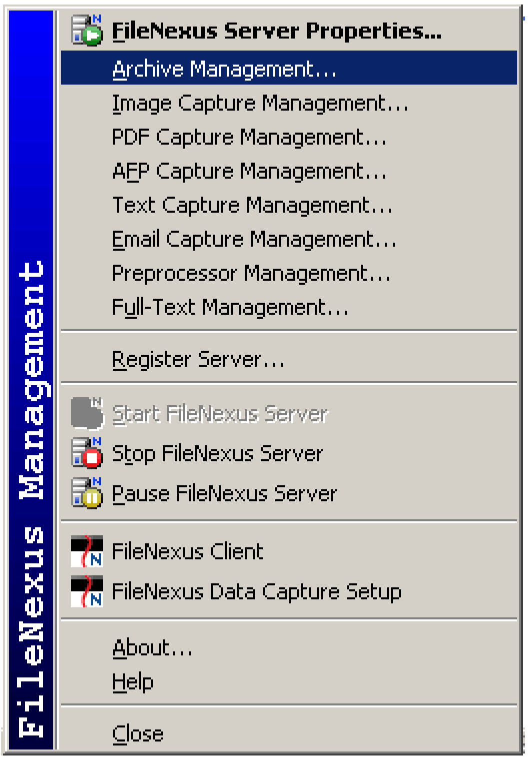
Delete Contact
If a contact is highlighted, clicking this icon will remove them from the list of contacts to notify.

Send Test Email
Clicking on this icon will send a test message from the FileNexus Server to all contacts setup in the list of contacts to notify.

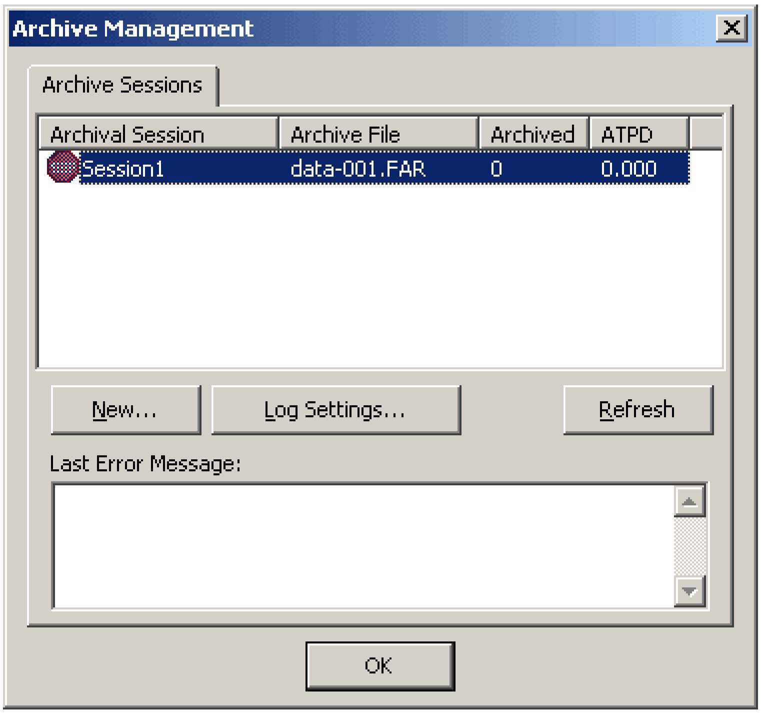
Archive Management

Archive Management refers to any of the setup, managing, or running of the Auto Archival Service. The Auto Archival Service is run as a Windows Service, the FileNexus Archive Service, and continually checks to see if any new documents have been put into one or more archival directories. Any detected documents will be indexed and archived. The FileNexus system will archive documents to hard disks, optical disks, etc.

To access the Archive Management, the front end management console of the Auto Archival Service, right-click on the **FileNexus Management** icon on your FileNexus Server and select **Archive Management**.



The Archive Management window allows you to manage the **Archive Sessions**.

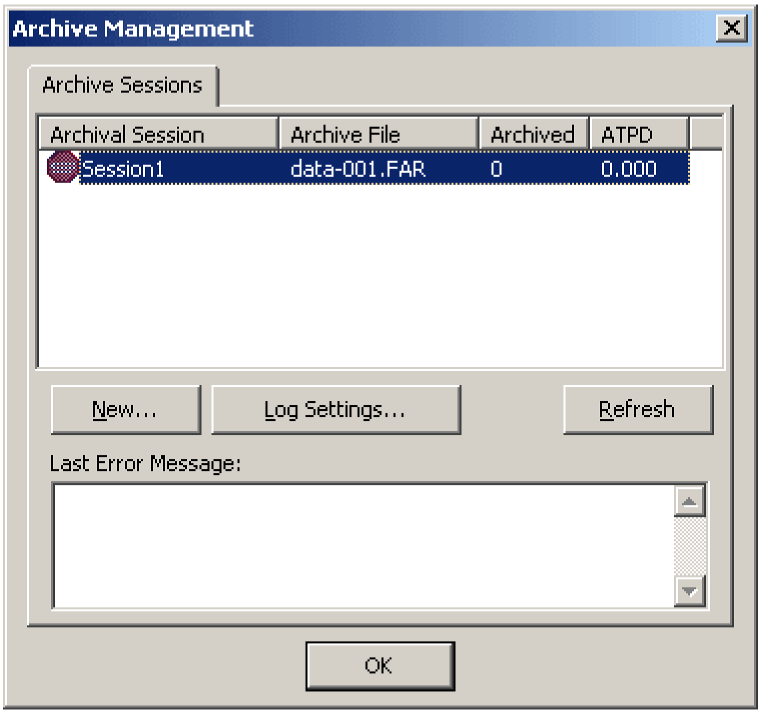


The **Archive Sessions** tab deals with creating, running, and removing of **Archive Sessions.** The **Archives** tab relates to any currently created archive files (.FAR) that contain the compressed, encrypted, and archived documents within the FileNexus system.

Archive Sessions

An **Archive Session** is a monitoring service that monitors a folder for new documents to be archived to the FileNexus system. Any documents that end up in the FileNexus system that can be searched for and viewed within the FileNexus Client, must first pass through an Archive Session in order to be compressed, encrypted, the index values posted to the FileNexus SQL Database, and then archived.

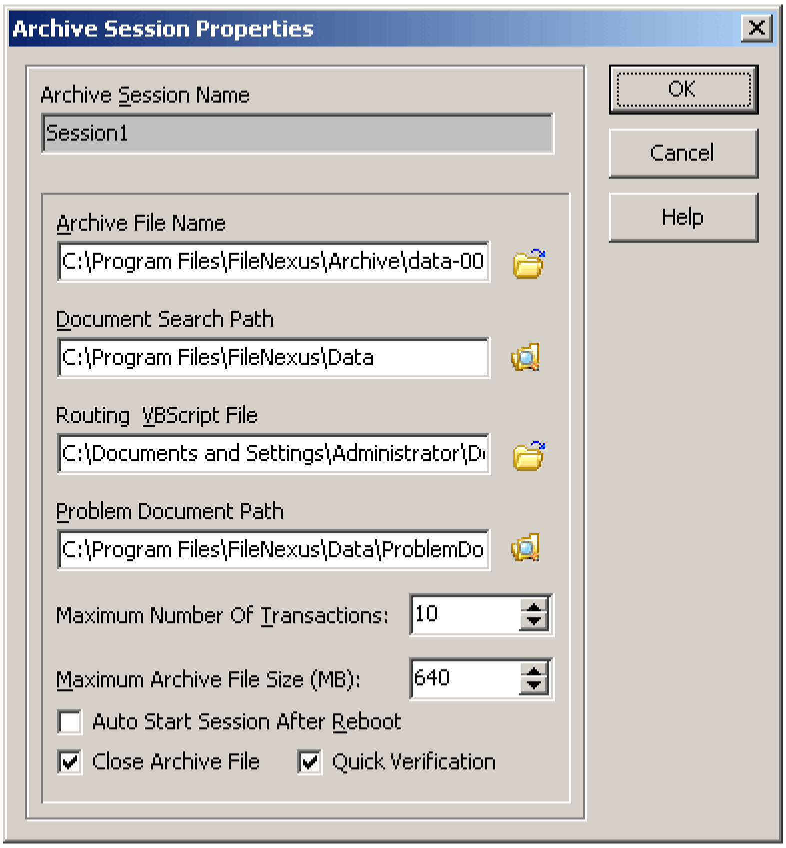
Each archive session monitors only one directory for documents waiting to be archived. Any files that are found in the directory is immediately compressed and added to an archive file (.FAR). The SQL database is then updated with the new information (index values) so that users can immediately find and retrieve archived documents in the FileNexus Client.



From this tab, you can create/modify/remove an archival session, start or stop a session, and modify log settings.

Creating, Modifying or Removing an Archive Session

To create a new archive session, simply click on the **New** button in the Archive Management window. The **New Archive Session** window will appear.



Archive Session Name
Each archive session must have a unique name. You may name the session for the types of documents being archived or the source of the documents. For example, if the Archive Session will be monitoring documents coming from a Scan Station, you may call the session “Scan Station 1 Docs”.

Archive File Name
The name of the archive file that the archive session will write new documents should be unique between archive sessions. If the archive file does not exist it will be created but the path to the file must be valid. If you are creating a new archive file, it's a good idea to end the name with "-0001.far". That way, when the file reaches its maximum size and the system creates a new file, it will use the same name, but change the last character from a 1 to a 2.

Document Search Path
This is the directory that the archive session will monitor for any new documents to be archived. If it sees any .NXS files with matching data files (.TXT, .PDF, .AFP, .TIF, etc), it will immediately compress and encrypt the data file, append it to the archive file, and archive it to the FileNexus system ready to be searched and retrieved. The contents of the .NXS (nexus script file) will be used to update the SQL database.

Routing VB Script
You may optionally have this Archive Session run a custom VB Script file to populate/update index values or change the behavior of the document being archived prior to archival. For example, a routing script (written in visual basic) could be used to examine the value of an index named "salesperson" and if the salesperson field had the value John, change the destination folder that the archived document will go to. If the value was Sue, it could be set to go to another folder.

NOTE: If you modify the routing VB Script an Archive Session executes, you must stop and restart the archive session in order for any changes to take effect on subsequently archived documents.

Problem Document Path
The Problem Document Path is optional. If you provide a path for this option, documents will be automatically routed to the outlined folder if some errors occur during archival, like an invalid index value for example. This will work for SOME, but not all errors. This feature has been added to allow your documents to continue archiving even if one problem document is encountered by the archive session. It will be your responsibility to manually address any “Problem Docs” that route to the Problem Document Path, or set up some other process for reviewing these files.

Maximum Number of Transactions
The archive service will wait until this number has been reached before it updates the SQL database with the index values of archived documents. For example, if the maximum number of transactions was set to 20 – the system would wait until it had archived 20 documents before it updated the SQL database. For high volume applications this can speed the archival process –since only one SQL update needs to be done for each 20 records added.

Maximum Archive File Size
When this limit is reached the system will automatically create a new archive file and begin archiving to the new file. The archive file size box is represented in Megabytes, so a value of 650 would mean that you don't want you archival files to grow larger than 650 Megabytes (a good size if you want to copy your archival files to a CD at some later date).

Auto Start Session After Reboot
If this option is checked, the Archive session will start automatically when the Windows FileNexus Archive Service starts (usually this is set to Automatic start after reboot). If it is not checked, you'll need to manually start the session when you want it to run.

Close Archive File
If this option is checked, FileNexus will automatically close the archive file that this session is using when it reaches its maximum size. Once an archive file is closed no more documents can ever be added to it.

Quick Verification
Archive files can be verified to ensure that they contain the files that are listed in your SQL database. Quick verification uses checksums built into the archive file to compare against the values stored in the SQL database. A thorough check actually does a byte-by-byte comparison – and takes longer to complete.

How Many Archive Sessions?

Q. When would you want to use more than 1 archive session?

A. If you want to archive to different storage media or if you require that different VB Routing Scripts be executed on varied documents being archived.

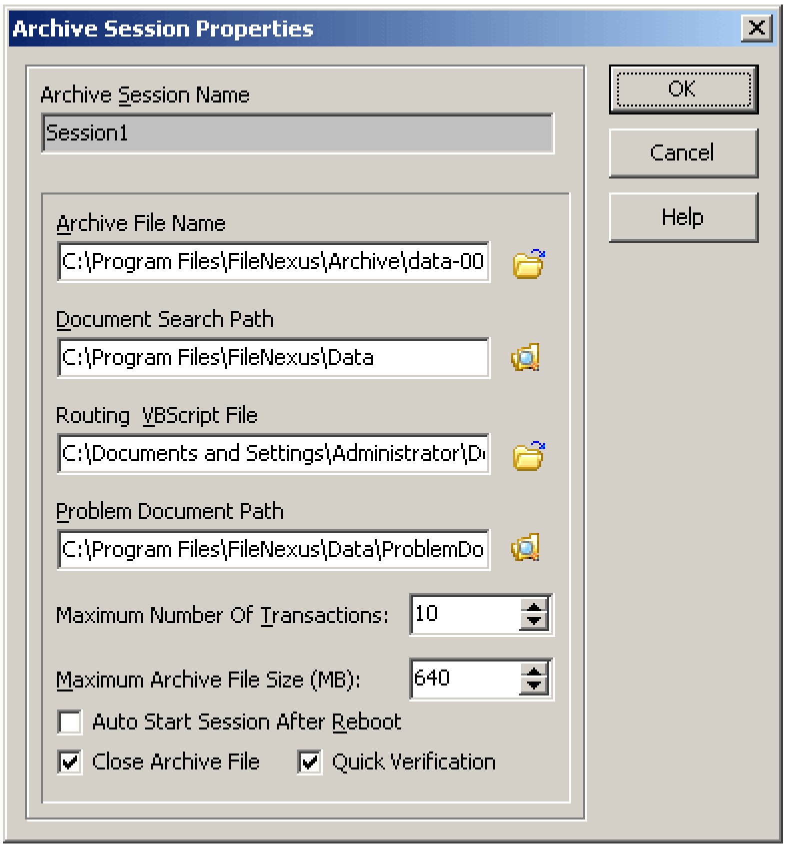
For instance you might create one session to archive all of your invoice files and store them to an optical disk, while having another session (running at the same time) archiving daily inventory status reports to a hard disk drive. Or if you wanted all of your image documents to go to one archive file while your text documents went to another file, you would need to use multiple archival sessions. Another point to keep in mind is if your organization has specific data retention policies in place, you may wish to segregate your data and be able to purge specific types of data after a certain period due to compliance regulations.

Removing an Archival Session
If you no longer need an archive session, you may right-click on it and select Remove Session from the pop-up menu.

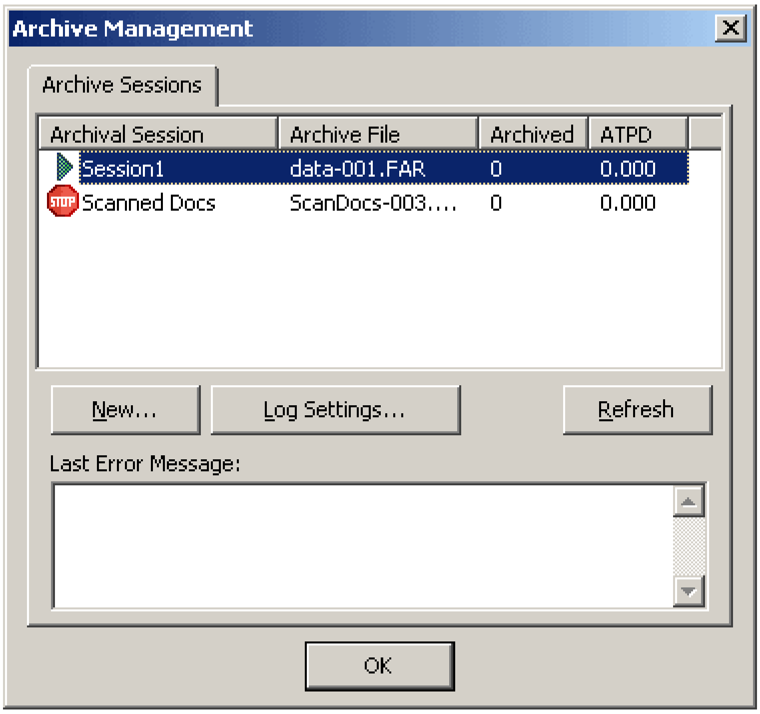
NOTE: You can only remove an archive session that is stopped.

Modifying an Archive Session

If you want to modify an existing archive session, you must right-click the session and select **Stop Session**. Then right-click on or double-click the same session and select **Properties**. In the Archive Session Properties window, you can edit the directory the archive session monitors, the name of the archive file that the documents will be archived and compressed into, and add/remove any routing VB Script as necessary. You cannot modify the name of an existing archive session; its name will be grayed out.

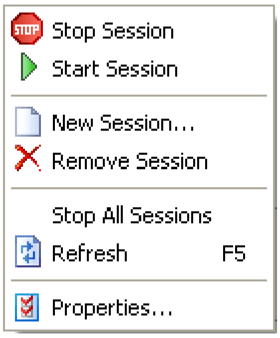


Starting and Stopping an Archive Session

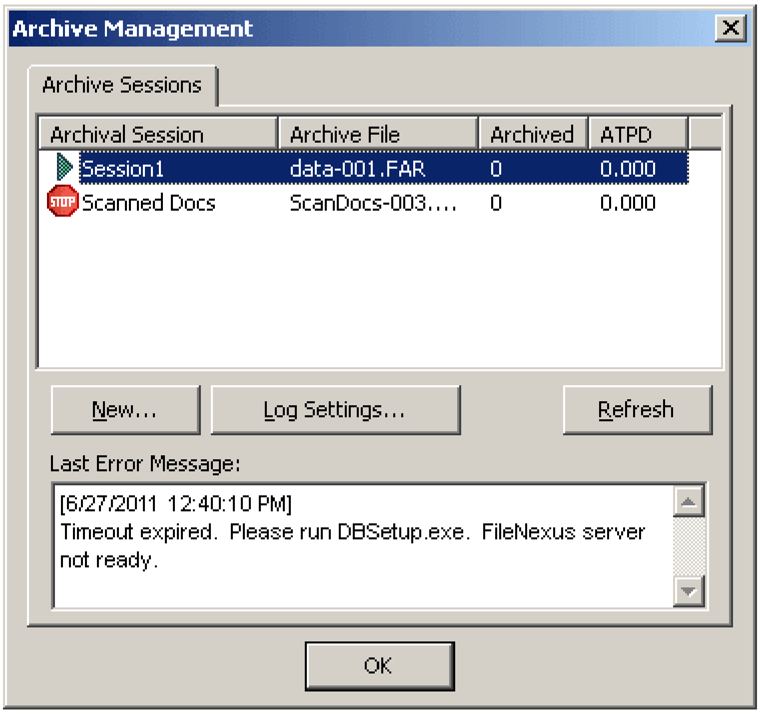


To start an archive session, you can right-click on the session and select Start Session.

To stop an archive session, you can right-click on the session and select Stop Session. Alternatively, you can stop all archive sessions by right-clicking and selecting Stop All Sessions.



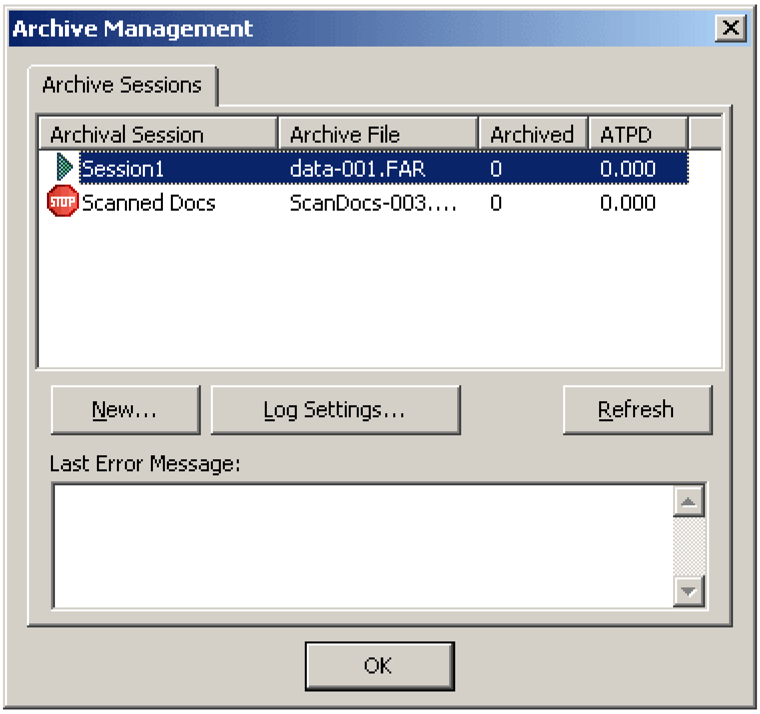
Last Error Message



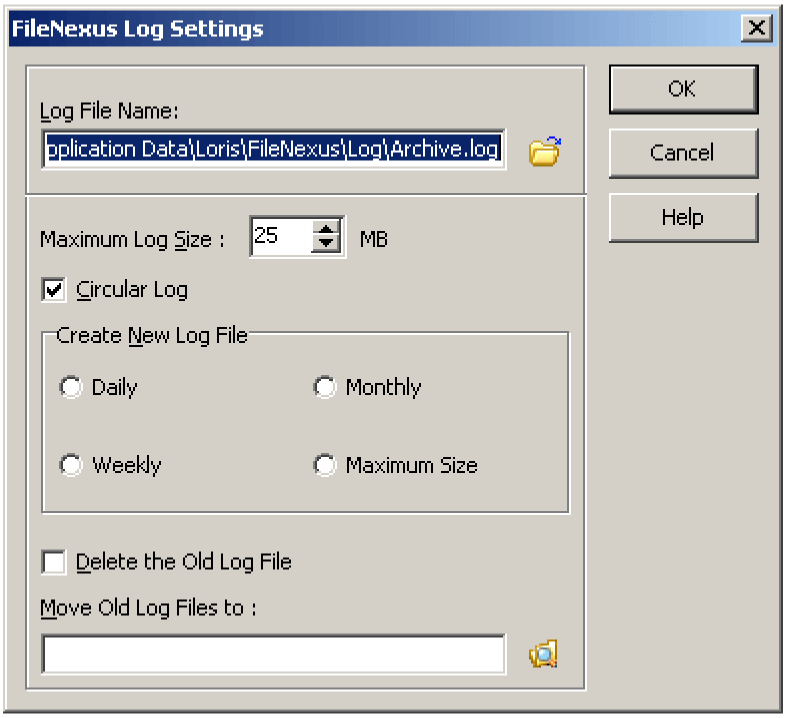
If any of your archive sessions encounter an error, e-mail notification message will be sent to a FileNexus administrator (if you have setup this option under FileNexus Server Properties), and the last error message will be displayed in the Archive Management window. Error messages should be descriptive enough to help to isolate and correct any problem that might exist.

Archive Management Log Settings

To access the log settings for your archive sessions, click on the **Log Settings** button in the *Archive Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your archival log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

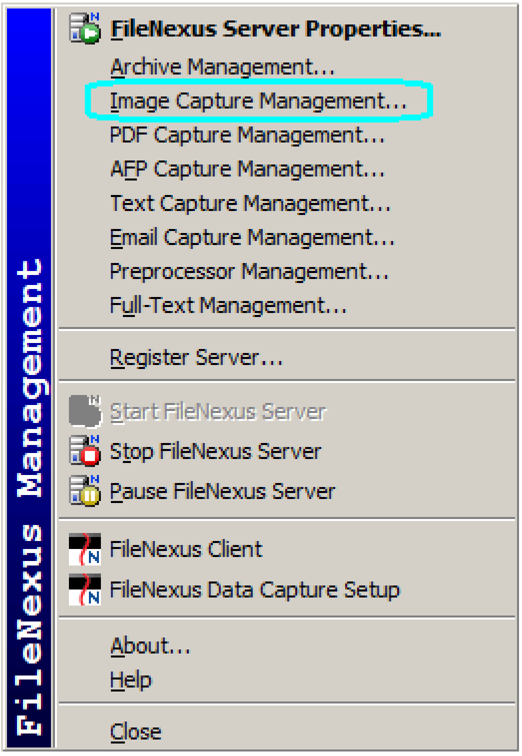
Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Overview

The Image Capture Service runs on the FileNexus server. When .tif files are sent from one or more multi-function devices to a directory monitored by and Image Capture Session, the Image Capture service can read any barcodes on the documents or barcode separator pages to help identify, burst, and index documents destined for FileNexus. The results are turned into multi-page .tif images with matching script files (.NXS) which can then be archived by the FileNexus Archive service.



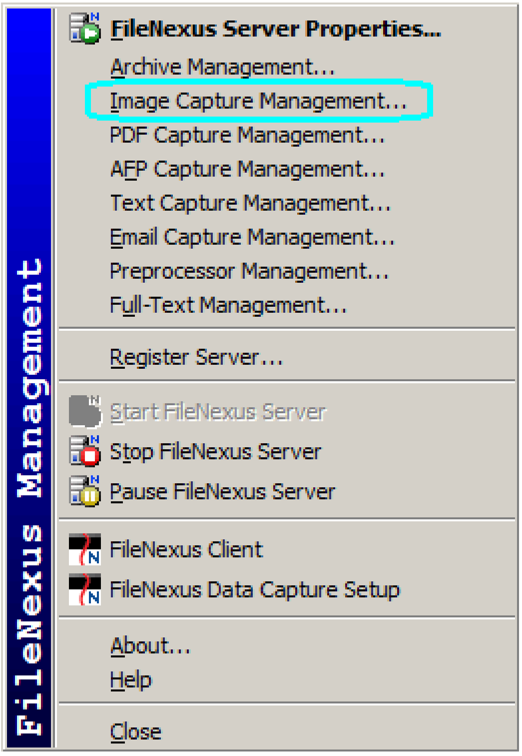
To access the Image Capture Management window, right-click on the FileNexus Management icon in your Windows System tray and select **Image Capture Management**.

Creating an Image Capture Session

The Image Capture service runs on the FileNexus server. This program monitors one or more directories looking for (.tif) files that have been sent to the server from a multi-function device capable of creating Tiff images.

When an Image Capture Session detects a new .tif file in the directory that it is monitoring, it will read any relevant barcodes from the .tif file and then try to identify, burst, and index the document. Identified .tif documents are then paired with matching .nxs script files and both files are sent to an output directory to be archived (by the FileNexus Auto Archive service). Tiff documents that cannot be identified are placed into an *Unknown* directory.

To set up Image Capture Sessions, select **Image Capture Management** from the FileNexus Management console (as shown below).



If this is the first time that you have used the Image Capture Management, you'll need to create one or more sessions. To create a new session, click on the **New** button in the **Image Capture Management** window.

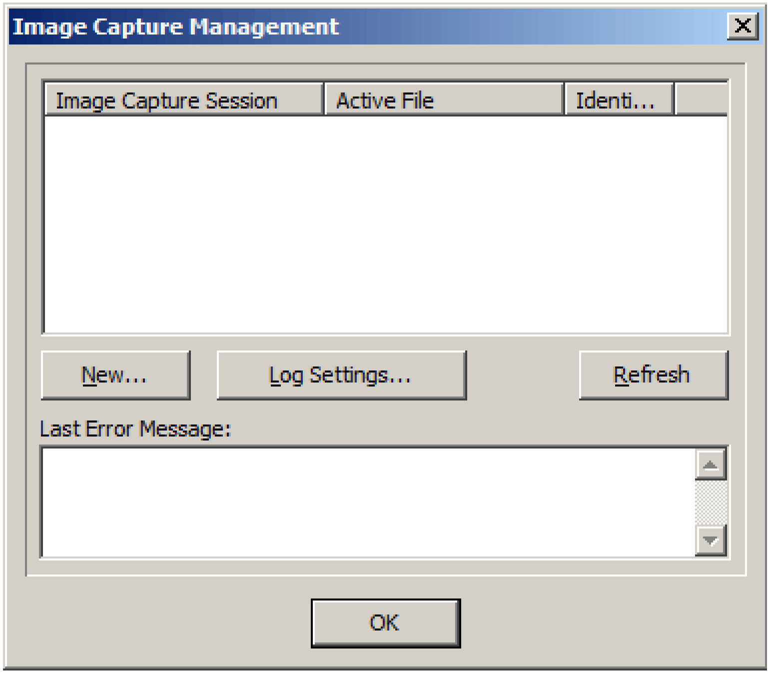
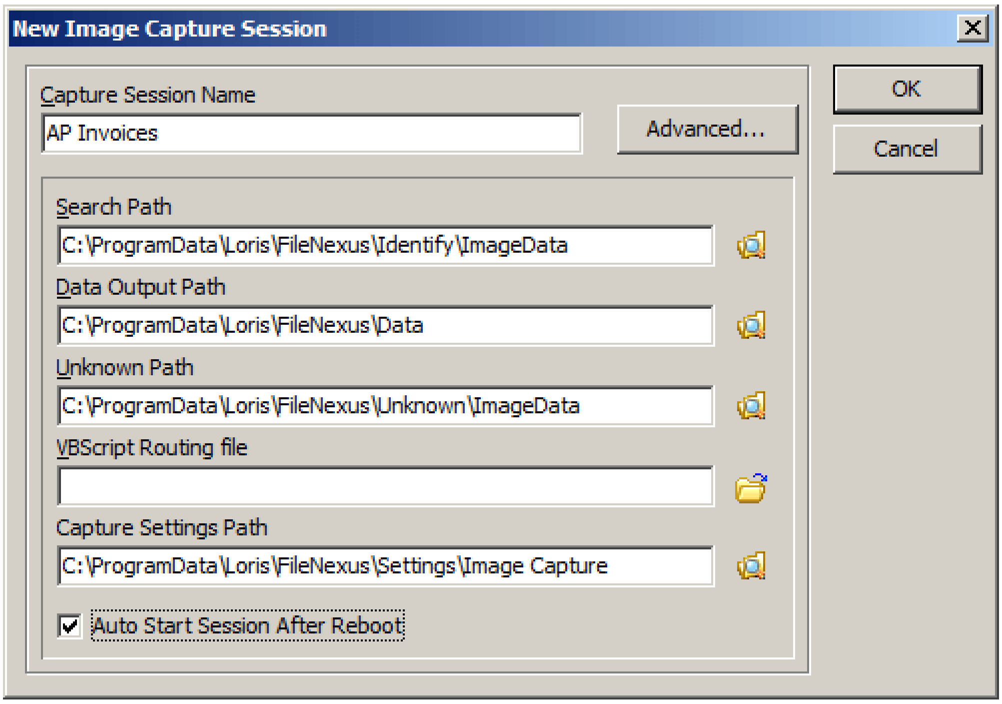


Image Capture Session Properties



For each image capture session that you create you will need to provide FileNexus with some basic information.

Capture Session Name
Enter the name of the session. Try to make the name of the session descriptive enough so that anyone who sees it will immediately recognize what this session is doing (i.e. in the example above the session is identifying scanned AP Invoices).

Search Path
This is the directory that the session will monitor. When it detects a new .tif file in this directory, it will open the .tif file and look for any barcodes on the page or barcode separator pages. The barcode value(s) will then be used to identify, burst, and index the document.

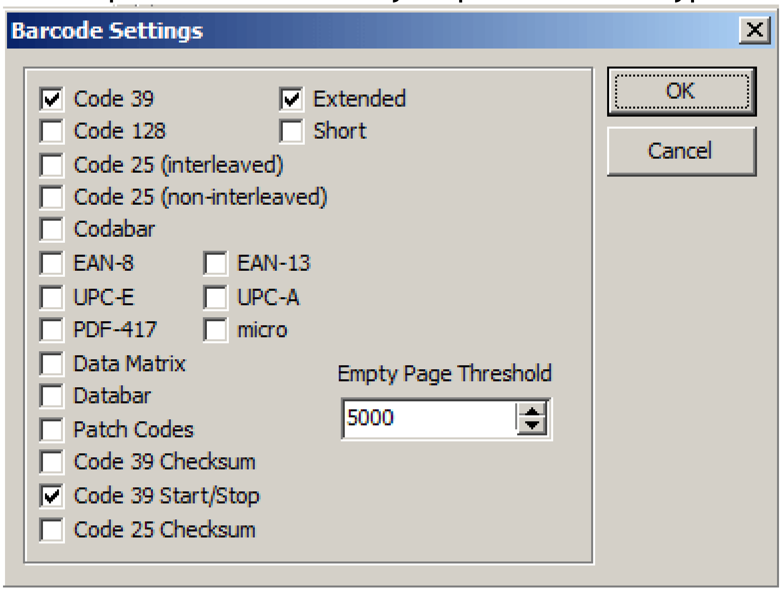
Unknown Path
If the Image Capture service is unable to identify a document it will move the document to the unknown directory.

Routing VBScript File
If you have a custom VB Script written for the session then you will need to enter the full path to the VB Script document here.

Capture Settings Path
This path should point to a directory containing a single .ini file created via the FileNexus Data Capture Setup utility. The .ini file is a report definition or template that tells FileNexus how to identify a document and populate index values based on barcodes on or between documents.

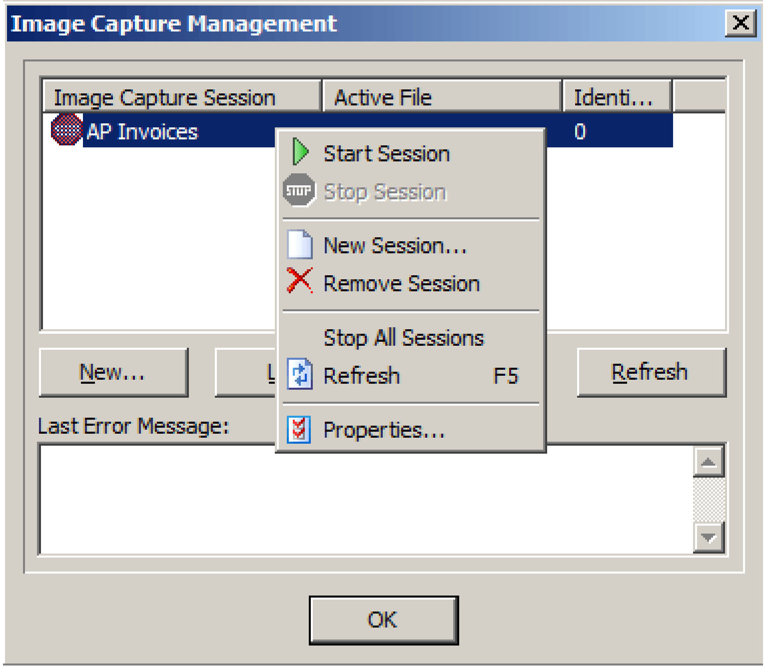
Auto Start Session After Reboot
If this option is selected the Image Capture service will start as soon as your computer starts. In most cases, this option should be selected.

The Advanced Button
By clicking on the Advanced Button, you can access the Barcode Settings window. This window is important and should be set for each new Image Capture Session you create. First, place a checkmark beside the type of barcode font found on your documents (on the document or on the barcode separator pages). In the example below, the barcode is "Code 39" or 3 of 9. We've also checked on "Extended" and "Code 39 Start/Stop" as these options are commonly required for this type of font.



Use the **Empty Page Threshold** if you are scanning your documents in Duplex mode (double-sided). By entering the number of bytes in this edit box (5000 in our example), you are telling FileNexus to delete or ignore any pages (or backs of pages) that contain less than the set number of bytes. Hit **OK** to save your changes.

Image Capture Session Right-click Menu



Right-clicking on a session in the Image Capture Management window will allow you to do the following:

Start Session
Starts an existing Image Capture Session that is stopped.

Stop Session
Stops an existing Image Capture Session that is running.

New Image Capture Session
Allows you to create a new Image Capture Session by launching the **New Image Capture Session** window.

Remove Session
Allows you to remove/delete an existing Image Capture Session.

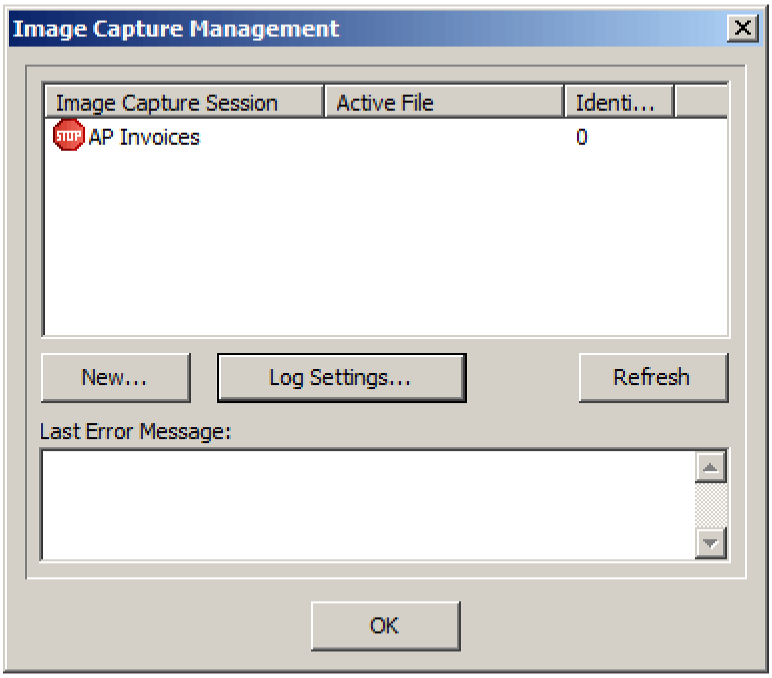
Stop All Sessions
Will stop all existing Image Capture Sessions that are currently running.

Refresh
Will refresh the number of documents in the Identify column for any running Image Capture Sessions.

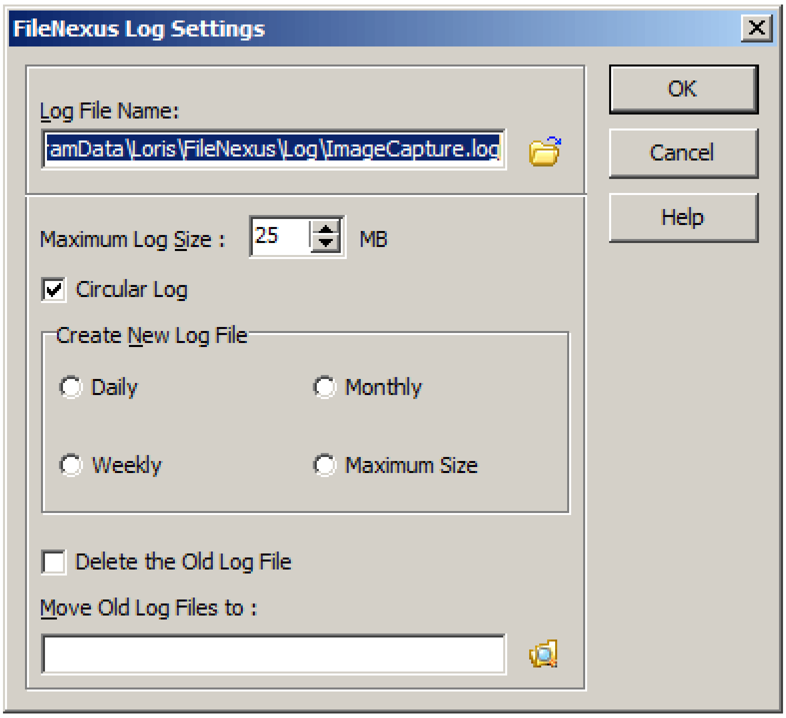
Properties
Will open up the Image Capture Session Properties window for you to edit an existing Image Capture Session that is stopped.

Image Capture Management Log Settings

To access the log settings for your Image Capture sessions, click on the **Log Settings** button in the *Image Capture Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

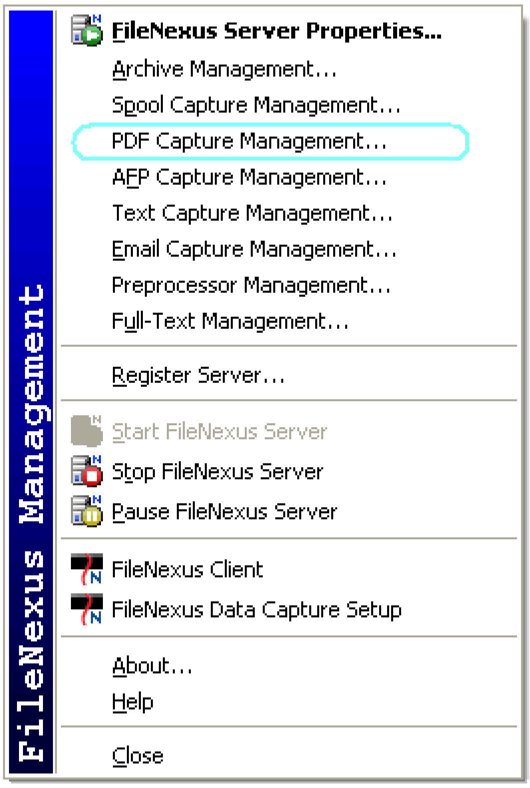
Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Overview

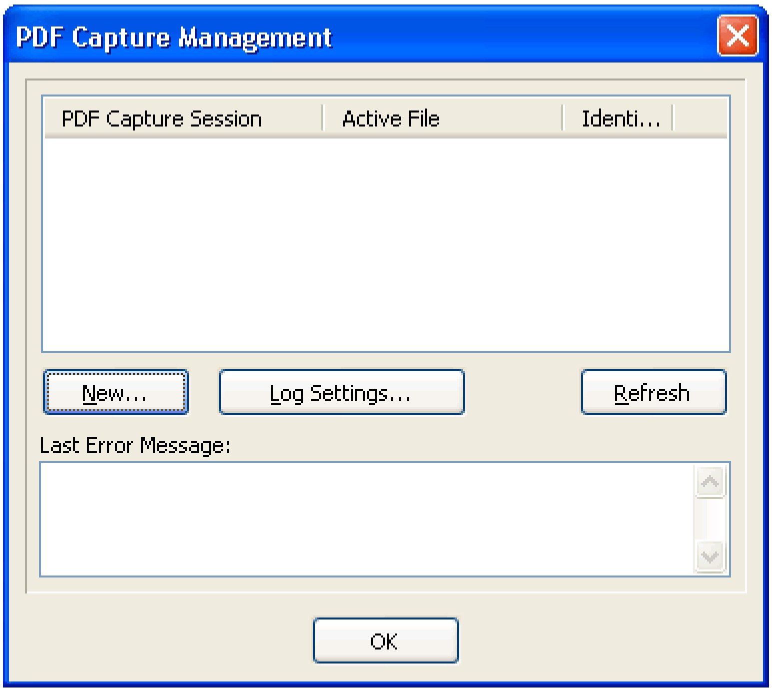
The PDF Capture Service runs on the FileNexus Server and continually checks to see if any new documents have been put into one or more identification directories. Any found PDF documents will be identified, burst, indexed, and a matching .nxs file will be created by the FileNexus system to prepare the document for archiving. FileNexus then automatically moves these matched pairings of files to a directory monitored by an archive session in order to be archived by FileNexus.



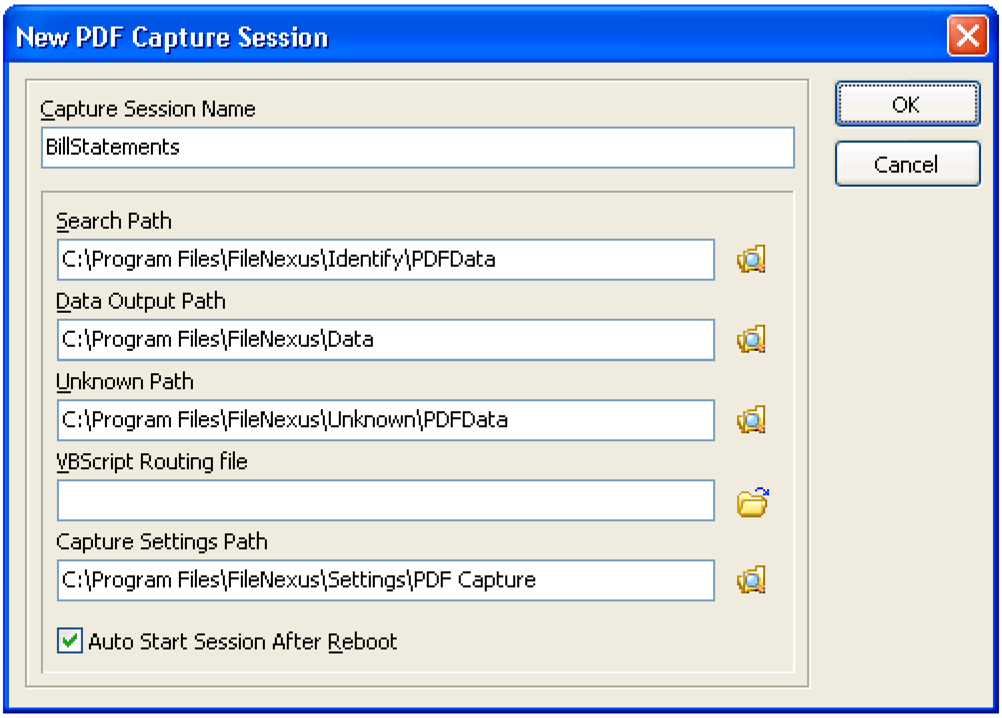
To access the PDF Capture service, right-click on the FileNexus Management icon in your Windows system tray and select PDF Capture Management to launch the PDF Capture Management window.

Creating, Modifying, or Removing a PDF Capture Session

To create a new PDF capture session, simply click on the **New** button from the PDF Capture Management window.



The **New PDF Capture Session** window will appear.



Capture Session Name
Each PDF capture session must have a unique name.

Search Path
This is the directory that the PDF capture session will monitor. If it detects any new .pdf files, it will immediately prepare the files for archiving by retrieving and filling in index values. The PDF file along with a matching .nxs file (created automatically by FileNexus) will be moved to the directory specified in the Data Output Path.

Note: Any PDF files placed into this directory will be removed once the corresponding PDF Capture Session is started.

Data Output Path
The path you specify in this text box will be used by FileNexus to route PDF files and their matching .nxs files. This should be the directory that an auto archival session monitors to archive the document(s) into the FileNexus system.

Unknown Path
This path is used by FileNexus to route PDF documents in case the documents in the Search Path are not recognized by a defined .ini file. Rather than deleting or ignoring files that do not match an existing report definition (.ini file), FileNexus will put the offending file(s) in an "Unknown" directory.

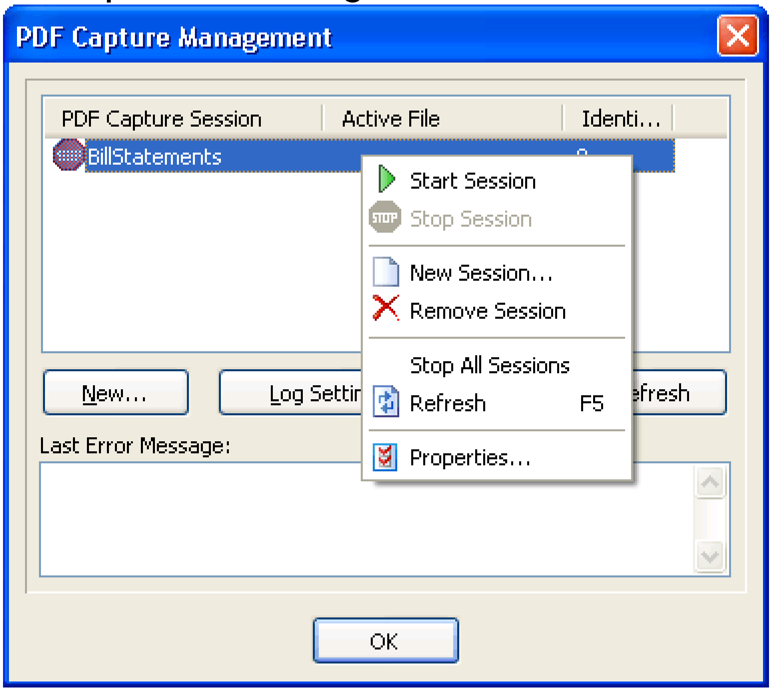
VBScript Routing File
You may optionally have this PDF Capture session run a VB Script file to populate/update index values or change the behavior of the document being identified. For example, a routing script (written in visual basic) could be used to examine the value of an index named "salesperson" and if the salesperson field had the value John, change the destination folder that the archived document will go to. If the value was Sue, it could be set to go to another folder.

NOTE: If you add or modify the routing VB Script a PDF capture session is/will be using, you must stop and restart the capture session in order for any changes or additions to take effect on subsequently identified documents.

Capture Settings Path
This path should point to a directory containing one or more .ini files created via the FileNexus Data Capture Setup utility. The .ini files are report definitions that tell FileNexus how to identify a document and extract any contained index values.

Auto Start Session After Reboot
If this option is checked this PDF Capture session will start automatically when the PDF Capture service starts. If it's not checked, you'll need to manually start the session when you want it to run.

PDF Capture Session Right-click Menu



Right-clicking on a session in the PDF Capture Management window will allow you to do the following:

Start Session
Starts an existing PDF Capture Session that is stopped.

Stop Session
Stops an existing PDF Capture Session that is running.

New Session
Allows you to create a new PDF Capture Session by launching the **New PDF Capture Session** window.

Remove Session
Allows you to remove/delete an existing PDF Capture Session that is stopped.

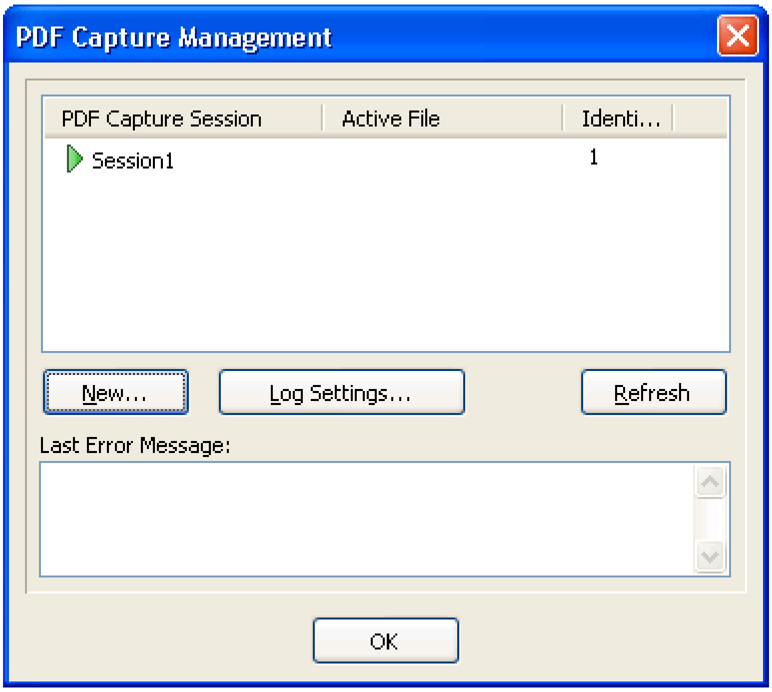
Stop All Sessions
Will stop all existing PDF Capture Sessions that are currently running.

Refresh
Will refresh the number of documents in the Identify column for any running PDF Capture Sessions.

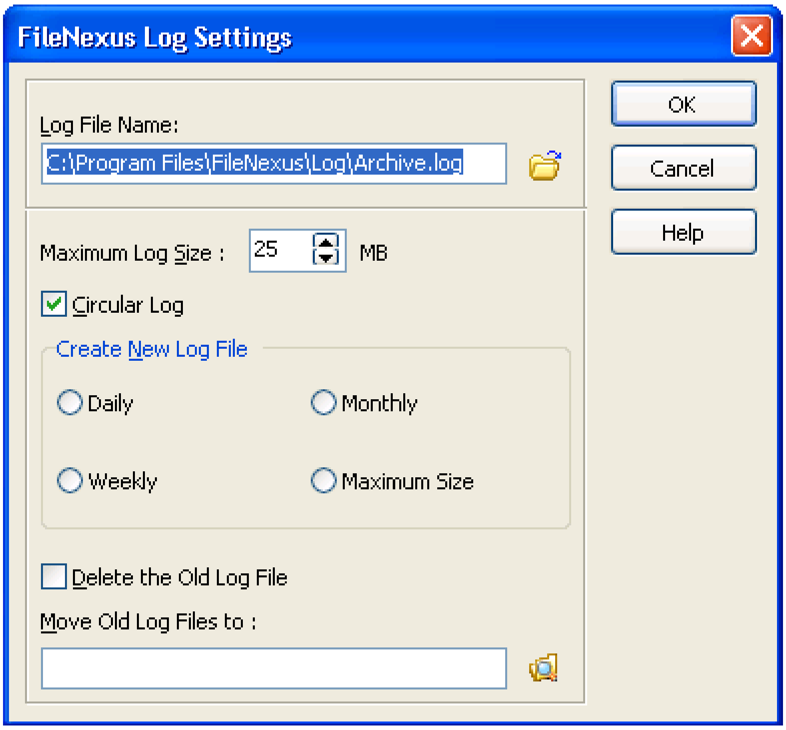
Properties
Will open up the PDF Capture Session Properties window for you to edit an existing PDF Capture Session that is stopped.

PDF Capture Management Log Settings

To access the log settings for your PDF Capture sessions, click on the **Log Settings** button in the *PDF Capture Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow - or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

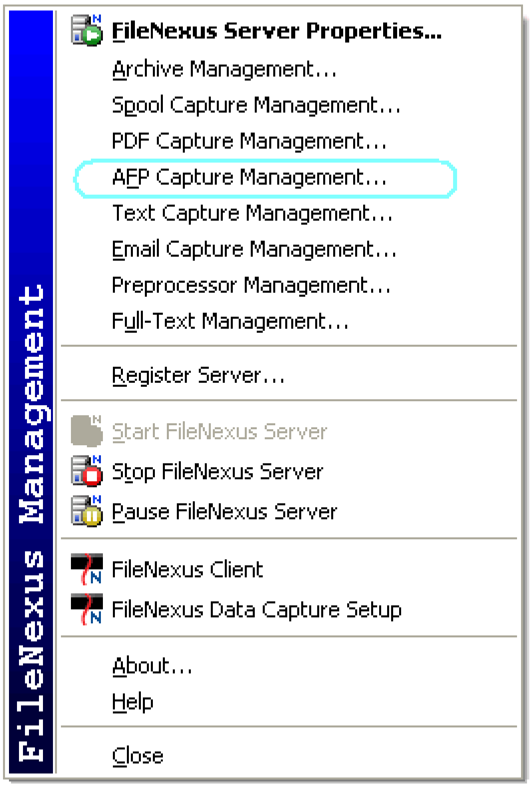
Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Overview

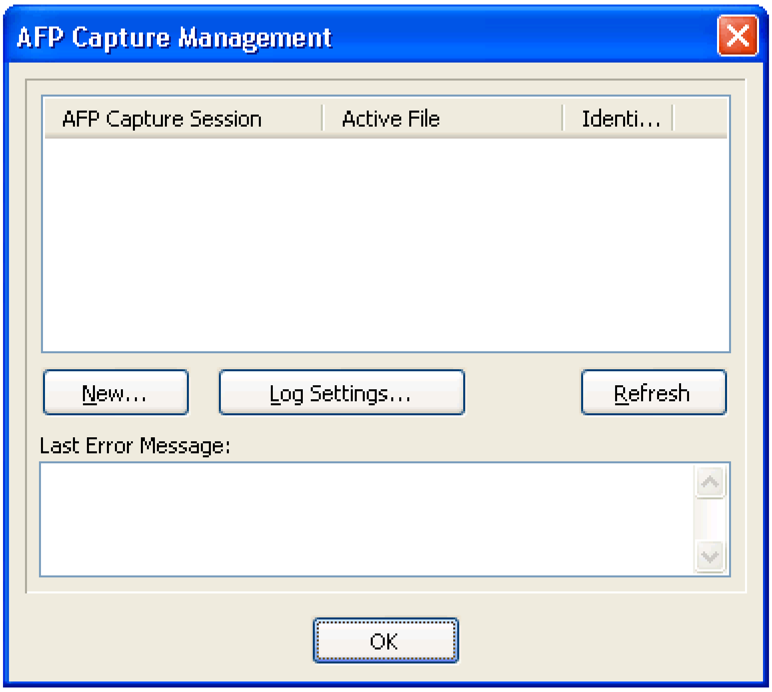
The AFP Capture Service runs on the FileNexus Server and continually checks to see if any new documents have been put into one or more identification directories. Any found AFP documents will be identified, indexed, and a matching .nxs file will be created by the FileNexus system to prepare the document for archiving. FileNexus then automatically moves these matched pairings of files to a directory monitored by an archive session in order to be archived by FileNexus.



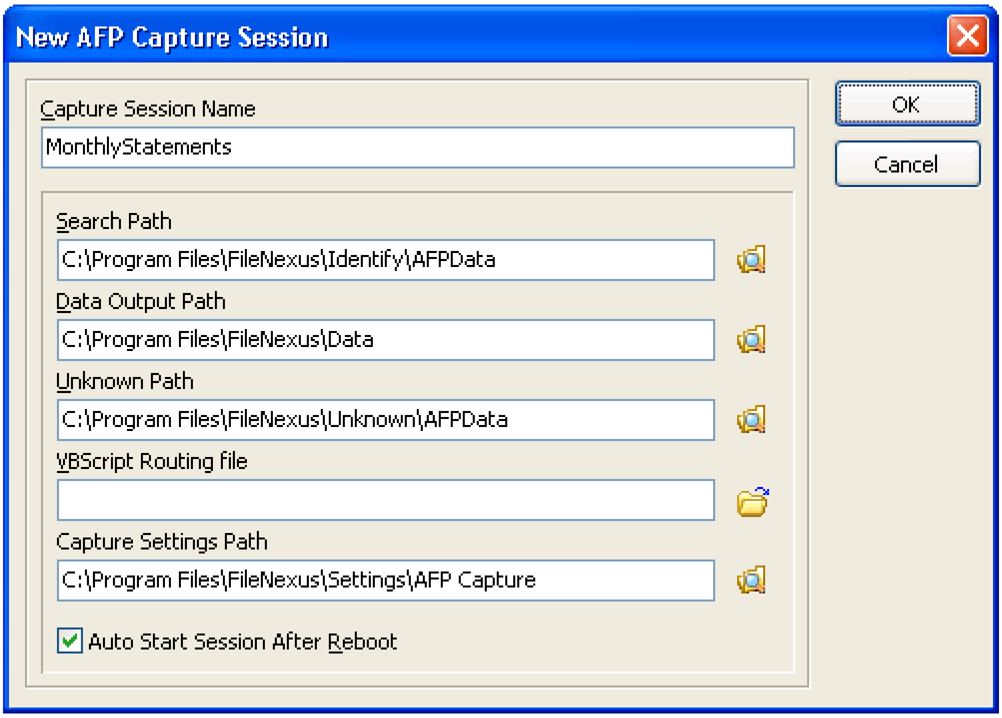
To access the AFP Capture service, right-click on the FileNexus Management icon in your Windows system tray and select AFP Capture Management to launch the AFP Capture Management window.

Creating, Modifying, or Removing an AFP Capture Session

To create a new AFP capture session, simply click on the **New** button from the AFP Capture Management window.



The **New AFP Capture Session** window will appear.



Capture Session Name
Each AFP capture session must have a unique name.

Search Path
This is the directory that the AFP capture session will monitor. If it sees any .afp files, it will immediately prepare the files for archiving by retrieving and filling in index values. The text file along with a matching .nxs file (created automatically by FileNexus) will be moved to the directory specified in the Data Output Path. Note: Any .afp files placed into this directory will be removed once the corresponding AFP Capture Session is started.

Data Output Path
The path you specify in this text box will be used by FileNexus to route .afp files and their matching .nxs files. This should be the directory that an auto archival session monitors to archive the document(s) into the FileNexus system.

Unknown Path
This path is used by FileNexus to route AFP documents in case the documents in the Search Path are not recognized by a defined .ini file. Rather than deleting or ignoring files that do not match an existing report definition (.ini file), FileNexus will put the offending file(s) in an "Unknown" directory.

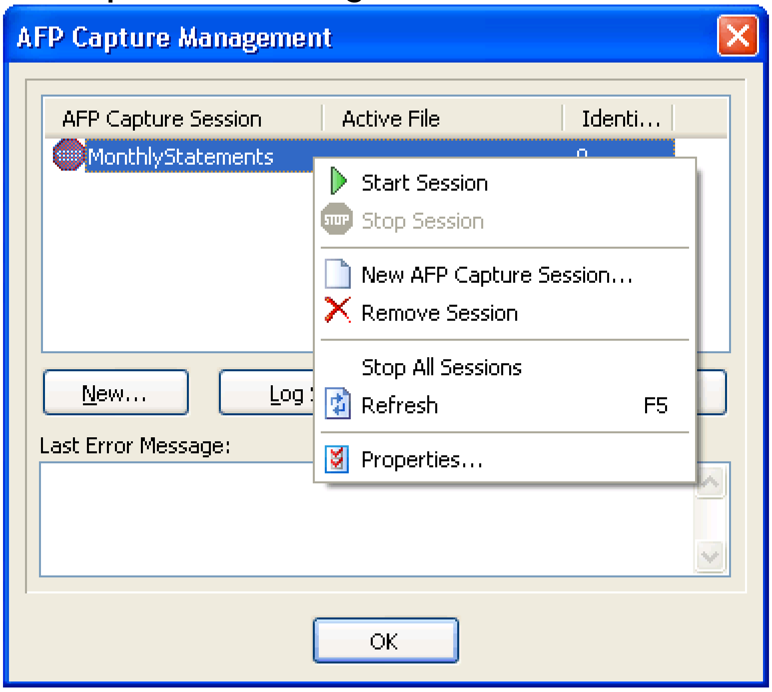
Routing VBScript
You may optionally have this AFP Capture session run a VB Script file to populate/update index values or change the behavior of the document being identified. For example, a routing script (written in visual basic) could be used to examine the value of an index named "salesperson" and if the salesperson field had the value John, change the destination folder that the archived document will go to. If the value was Sue, it could be set to go to another folder.

NOTE: If you add or modify the routing VB Script an AFP capture session is/will be using, you must stop and restart the AFP capture session in order for any changes or additions to take effect on subsequently identified documents.

Capture Settings Path
This path should point to a directory containing one or more .ini files created via the FileNexus Data Capture Setup utility. The .ini files are report definitions that tell FileNexus how to identify a document and extract any contained index values.

Auto Start Session After Reboot
If this option is checked this AFP Capture session will start automatically when the AFP Capture service starts. If it's not checked, you'll need to manually start the session when you want it to run.

AFP Capture Session Right-click Menu



Right-clicking on a session in the AFP Capture Management window will allow you to do the following:

Start Session
Starts an existing AFP Capture Session that is stopped.

Stop Session
Stops an existing AFP Capture Session that is running.

New AFP Session
Allows you to create a new AFP Capture Session by launching the **New AFP Capture Session** window.

Remove Session
Allows you to remove/delete an existing AFP Capture Session that is stopped.

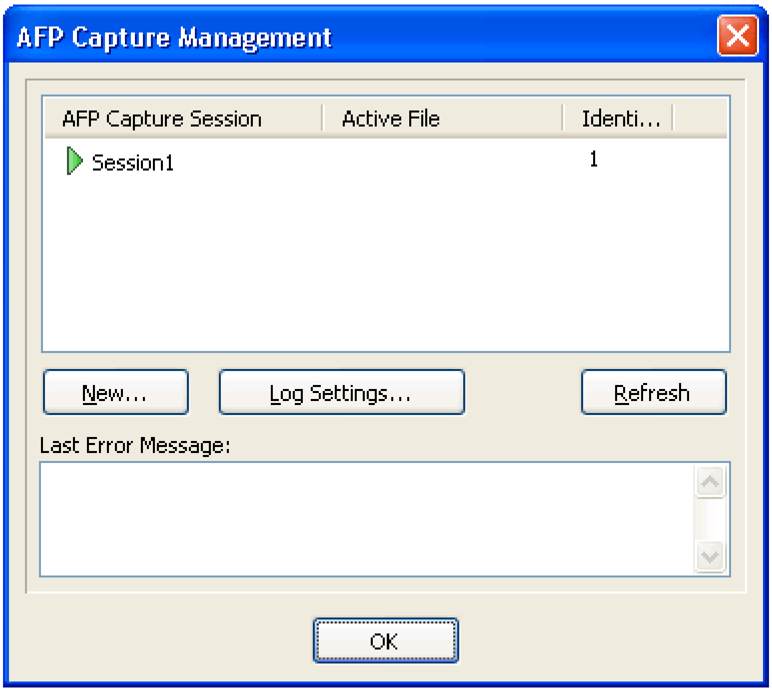
Stop All Sessions
Will stop all existing AFP Capture Sessions that are currently running.

Refresh
Will refresh the number of documents in the Identify column for any running AFP Capture Sessions.

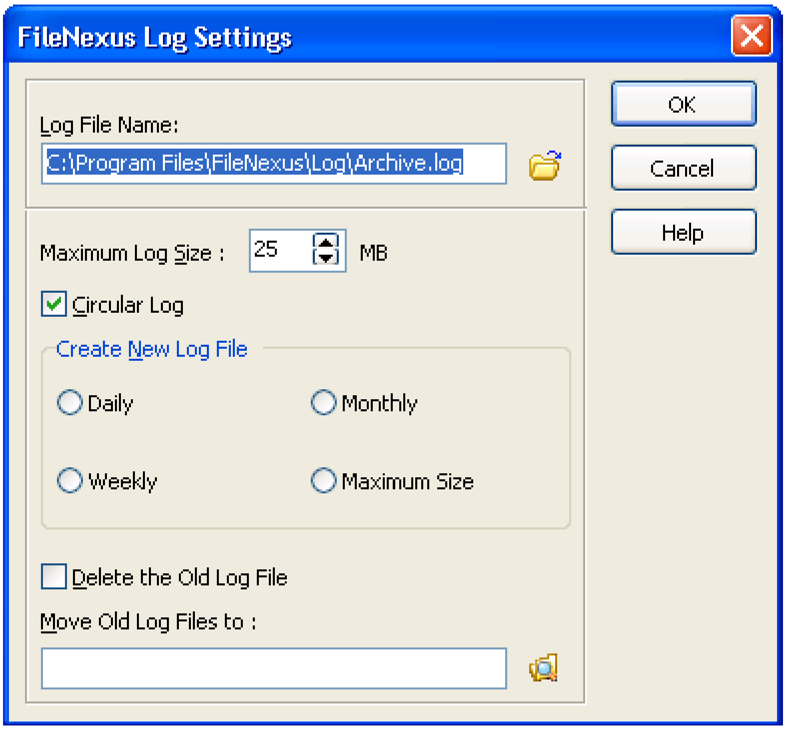
Properties
Will open up the AFP Capture Session Properties window for you to edit an existing AFP Capture Session that is stopped.

AFP Capture Management Log Settings

To access the log settings for your AFP Capture sessions, click on the **Log Settings** button in the *AFP Capture Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

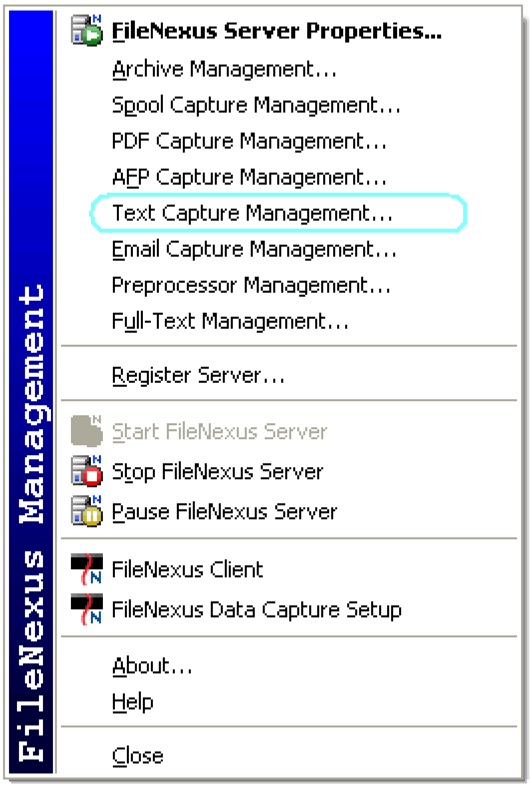
Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Overview

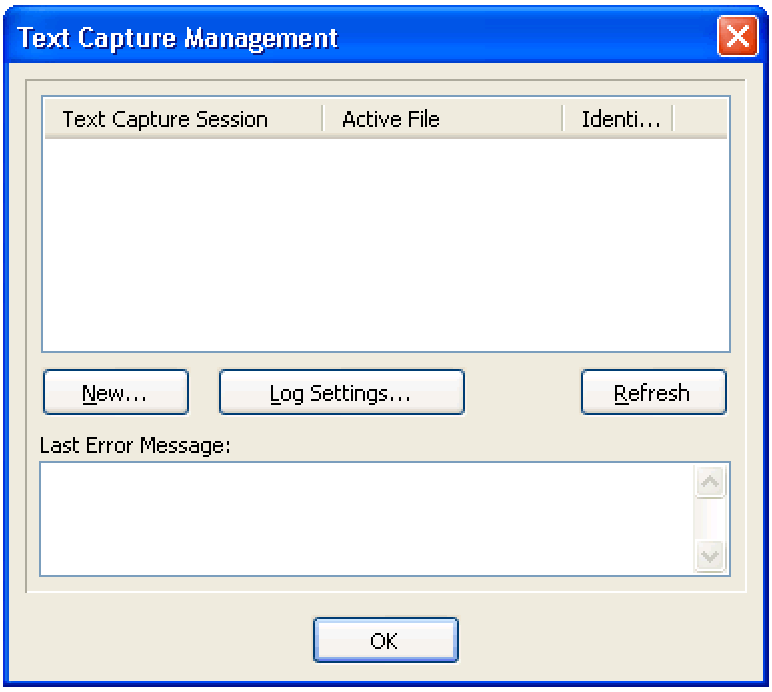
The Text Capture Service runs on the FileNexus Server and continually checks to see if any new documents have been put into one or more identification directories. Any found Text documents will be identified, indexed, and a matching .nxs file will be created by the FileNexus system to prepare the document for archiving. FileNexus then automatically moves these matched pairings of files to a directory monitored by an archive session in order to be archived by FileNexus.



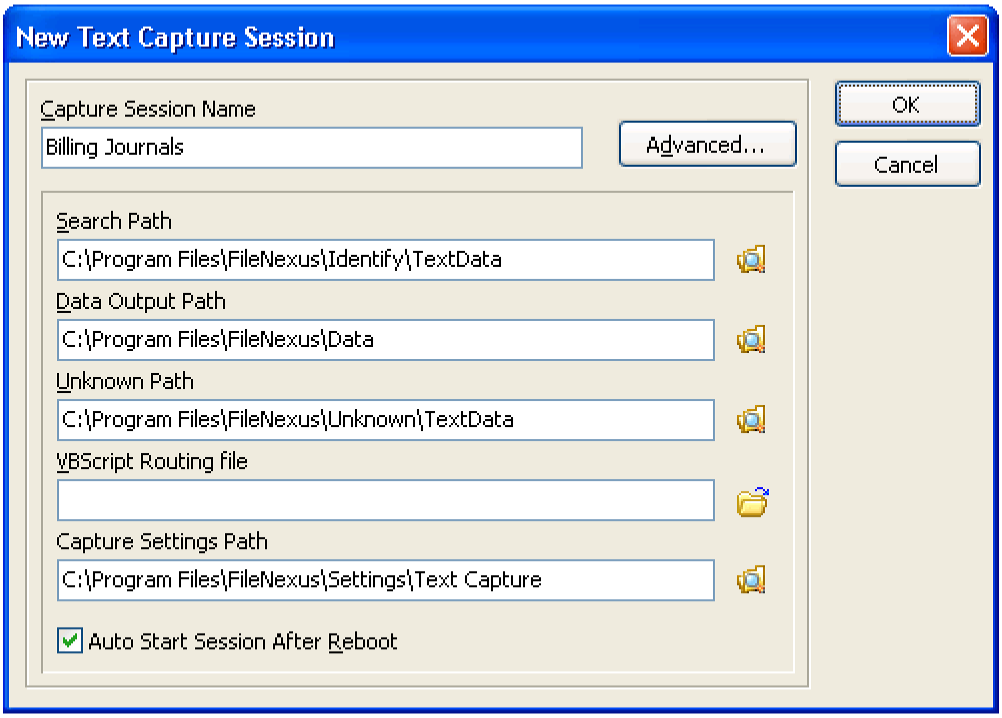
To access the Text Capture service, right-click on the FileNexus Management icon in your Windows system tray and select Text Capture Management to launch the Text Capture Management window.

Creating, Modifying, or Removing a Text Capture Session

To create a new Text Capture Session, simply click on the **New** button from the Text Capture Management window.



The **New Text Capture Session** window will appear.



Capture Session Name
Each text capture session must have a unique name.

Search Path
This is the directory that the text capture session will monitor. If it sees any .txt files, it will immediately prepare the files for archiving by retrieving and filling in index values. The text file along with a matching .nxs file (created automatically by FileNexus) will be moved to the directory specified in the Data Output Path.
NOTE: Any text files in this directory will be removed once the corresponding Text Capture Session is started.

Data Output Path
The path you specify in this text box will be used by FileNexus to route text files and their matching .nxs files. This should be the directory that an auto archival session monitors to archive the document(s) into the FileNexus system.

Unknown Path
This path is used by FileNexus to route text documents in case the documents in the Search Path are not recognized by a defined .ini file. Rather than deleting or ignoring files that do not match an existing report definition (.ini file), FileNexus will put the offending file(s) in an "Unknown" directory.

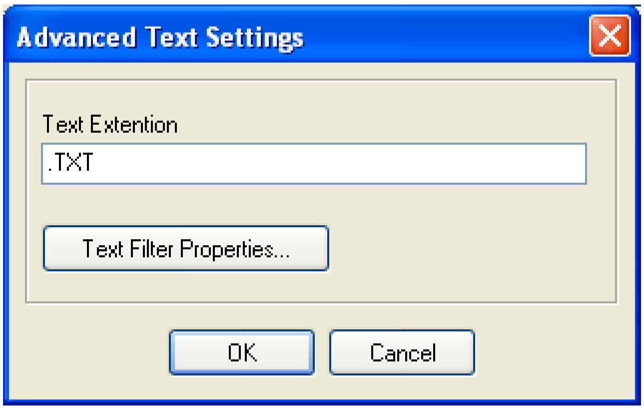
Routing VBScript
You may optionally have this Text Capture session run a VB Script file to populate/update index values or change the behavior of the document being identified. For example, a routing script (written in visual basic) could be used to examine the value of an index named "salesperson" and if the salesperson field had the value John, change the destination folder that the archived document will go to. If the value was Sue, it could be set to go to another folder.

NOTE: To add or modify a VB Script for a Text Capture Session, you must stop and restart the session in order for any changes or additions to take effect on subsequently identified documents.

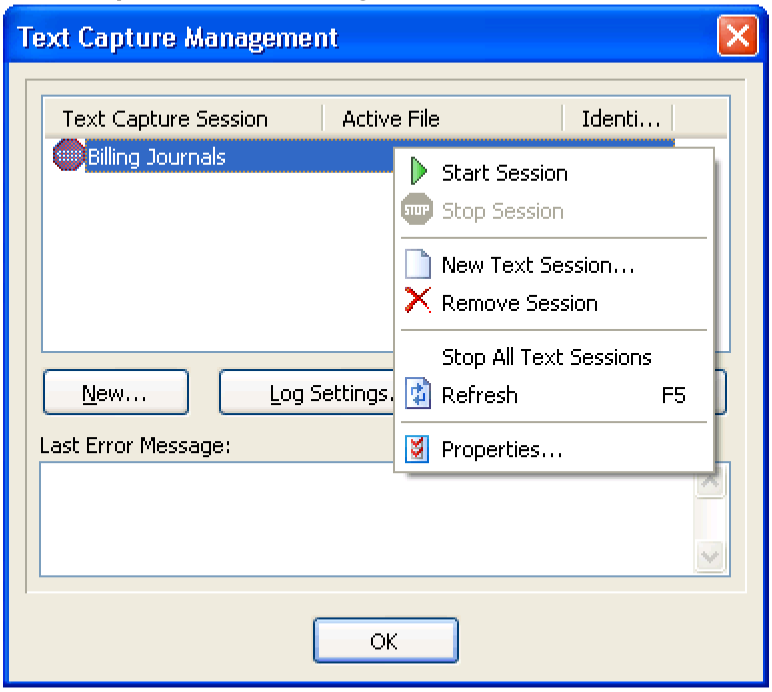
Capture Settings Path
This path should point to a directory containing one or more .ini files created via the FileNexus Data Capture Setup utility. The .ini files are report definitions that tell FileNexus how to identify a document and extract any contained index values.

Auto Start Session After Reboot
If this option is checked this Text Capture session will start automatically when the Text Capture service starts. If it's not checked, you'll need to manually start the session when you want it to run.

Advanced Button
The **Advanced** button will open up the **Advanced Text Settings** dialog. In the **Text Extension** edit box you can specify the file extension of the file(s) you wish to identify, in a comma separated list, as well as access the Text Filter Properties.



Text Capture Session Right-click Menu



Start Session
Starts an existing Text Capture Session that is stopped.

Stop Session
Stops an existing Text Capture Session that is running.

New Text Session
Launches the **New Text Capture Session** window to create a new Text Capture Session.

Remove Session
Allows you to remove/delete an existing Text Capture Session that is stopped.

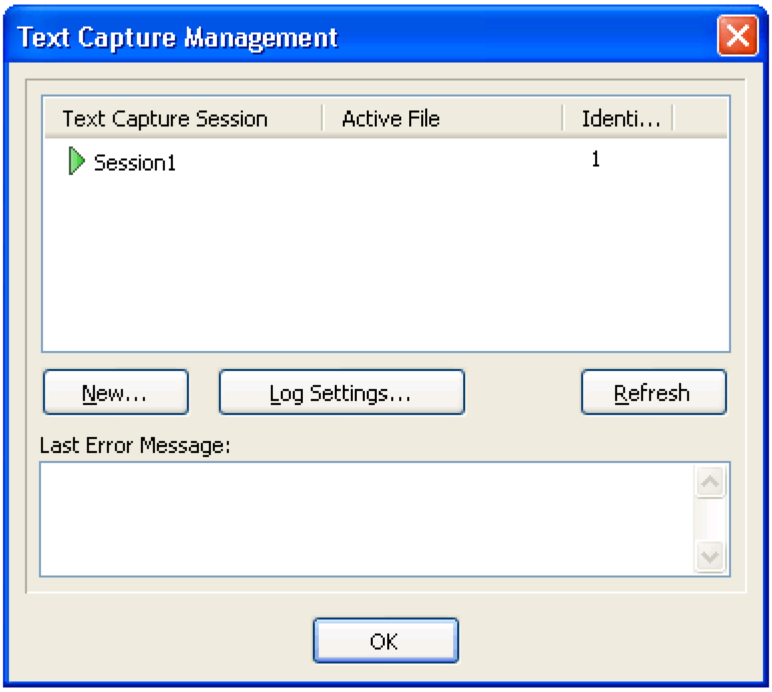
Stop All Text Sessions
Will stop all existing Text Capture Sessions that are currently running.

Refresh
Refreshes the number of documents under Identify for any Text Capture Sessions.

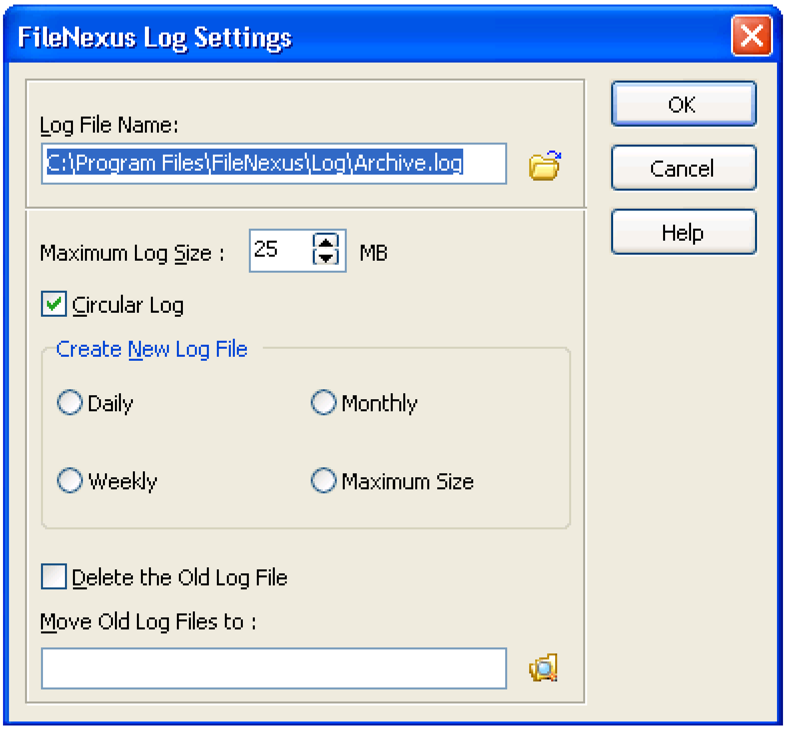
Properties
Opens the Text Capture Session Properties window for you to edit the session's settings.

Text Capture Management Log Settings

To access the log settings for your Text Capture sessions, click on the **Log Settings** button in the *Text Capture Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

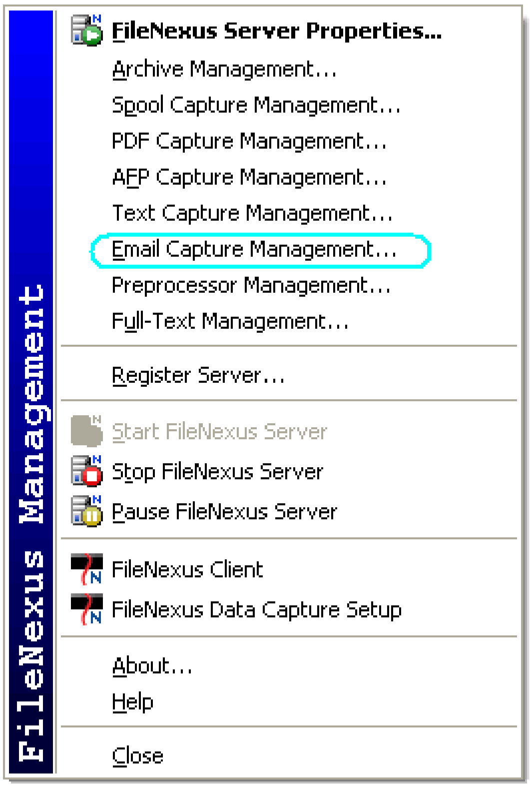
Preface

In order to take advantage of the FileNexus Email Module, your organization must have a Microsoft Exchange Server on which you have enabled Envelope Journaling. For more information on setting up Envelope Journaling in Microsoft Exchange, refer to the Microsoft guide available for download at : http://www.microsoft.com/downloads/details.aspx?familyid=D357E733-0E22-477C-B884-0C38FBB51533&displaylang=en

OR contact Loris Technical Support at support@loristech.com for a copy of the white paper on "Journaling with Microsoft Exchange Server 2003".

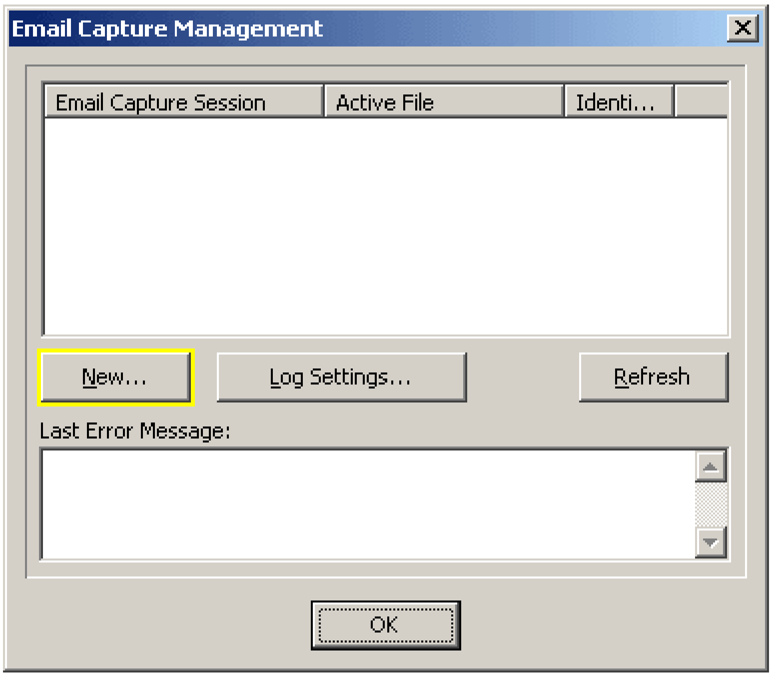
Overview

The Email Capture Service runs on the FileNexus Server and continually checks to see if any new email documents (.eml) have been put into one or more identification directories. Any found email documents will be identified, indexed, and a matching .nxs file will be created by the FileNexus system to prepare the document for archiving. FileNexus then automatically moves these matched pairings of files to a directory monitored by an archive session in order to be archived by FileNexus.

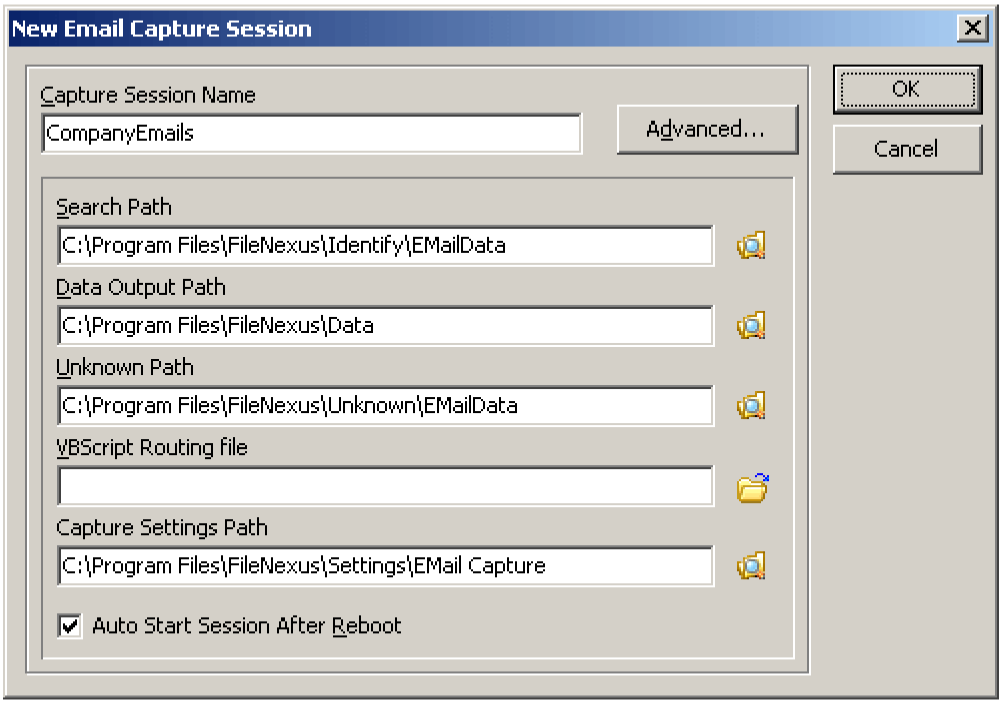


Creating, Modifying, or Removing an Email Capture Session

To create a new Email Capture Session, simply click on the **New** button from the Email Capture Management window.



The **New Email Capture Session** window will appear.



Capture Session Name
Each email capture session must have a unique name.

Search Path
This is the directory that an Email Capture Session will monitor. If it sees any .eml files, it will immediately prepare the files for archiving by retrieving and filling in index values. The .eml file along with a matching .nxs file (created automatically by FileNexus) will be moved to the directory specified in the Data Output Path. Any .eml files in this directory will be removed once the corresponding Email Capture Session is started.

Data Output Path
The path you specify in this text box will be used by FileNexus to route .eml files and their matching .nxs files. This should be the directory that an Archive Session monitors to archive new document(s) to the FileNexus system.

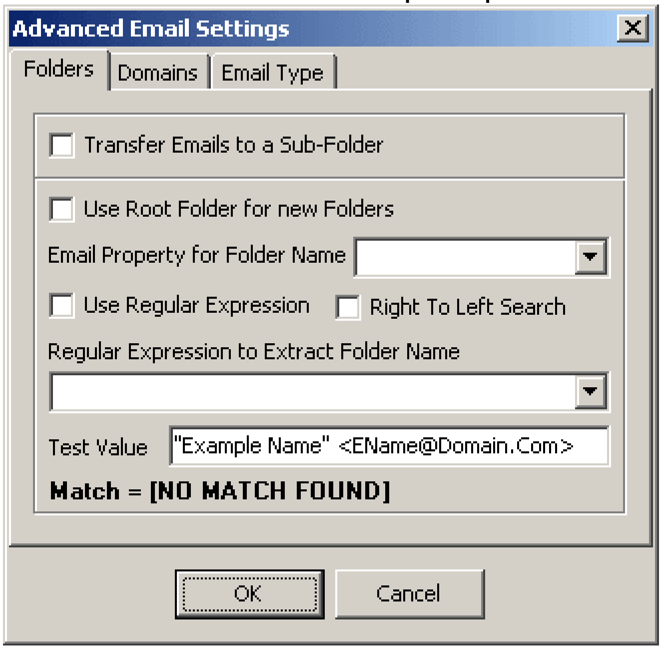
Unknown Path
This path is used by FileNexus to route .eml documents in case the documents in the Search Path are not recognized by a defined .ini file. Rather than deleting or ignoring files that do not match an existing report definition (.ini file), FileNexus will put the offending file(s) in an "Unknown" directory.

Routing VBScript
You may optionally run a VB Script in the Email Capture session to change or manage the documents being identified. To add or modify a VB Script for an Email Capture Session, you must stop and restart the session in order for any changes to take effect on subsequent documents to be identified.

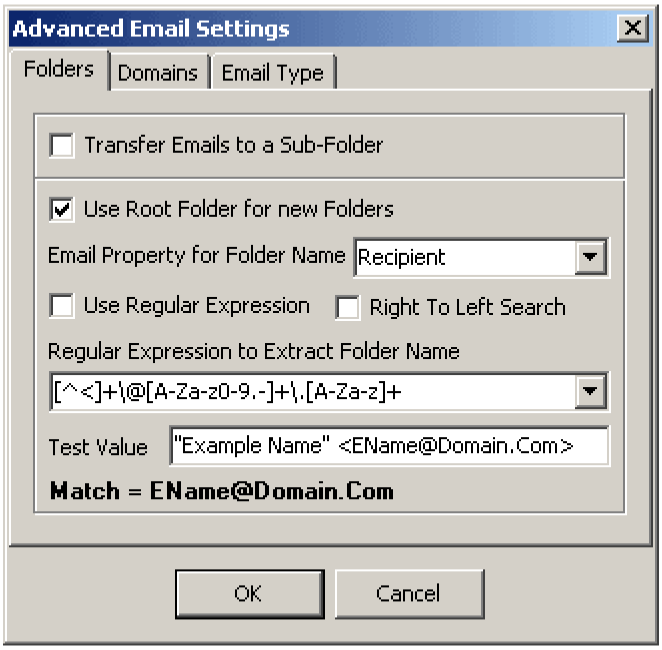
Capture Settings Path
This path should point to a directory containing one or more .ini files created via the FileNexus Data Capture Setup program. The .ini files are report definitions that tell FileNexus how to identify a document and extract any contained index values.

Auto Start Session After Reboot
If this option is checked this text Capture session will start automatically when the Text Capture service starts. If it's not checked, you'll need to manually start the session when you want it to run.

Advanced Button
The **Advanced** button will open up the **Advanced Email Settings** dialog.



Folders Tab



Transfer Emails to a Sub-Folder
Check on this option if you wish emails to be routed to a sub-folder of a designated folder in the FileNexus Client, not the root.

Use Root Folder for new Folders
Check on this option to have any new recipient folders automatically created directly under the “Root” folder of your FileNexus System. The root folder is the one at the top of the folder tree in the FileNexus Client and has the name of your FileNexus Server.

Email Property for Folder Name
Select “Recipient” from this drop-down to indicate that new folders created should be based on the email’s recipient (aka the Recipient index value of the email).

Use Regular Expression
Check on this option to select which part of the email address to use for the destination folder in the FileNexus Client.

Right to Left Search
Check on this option to have the regular expression run from right to left.

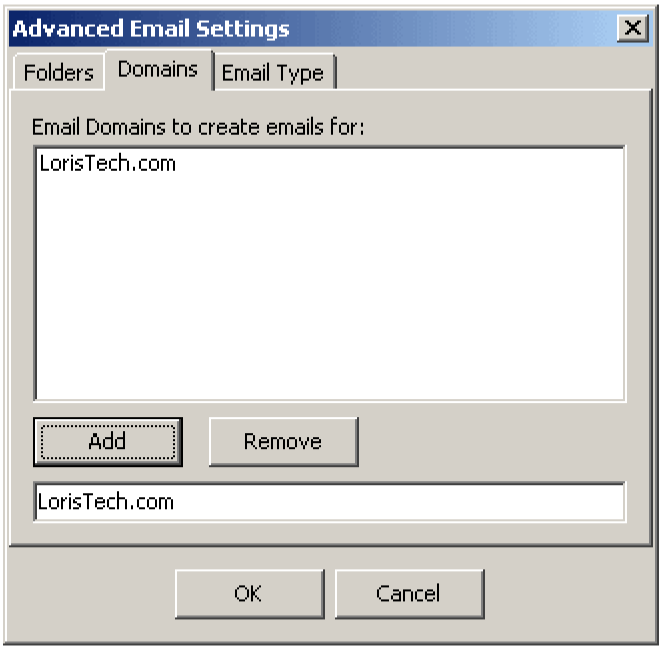
Regular Expression to Extract Folder Name
If *Use Regular Expression* is checked on, you can enter or select the regular expression in the drop down provided to set how the destination folder name should appear in the FileNexus Client based on the relevant portion of the recipient name.

Test Value
Enter a sample email address for your organization.

Match = …
Will let you verify what portion of the recipient name will be used to create email folders in the FileNexus Client.

Domains Tab

Email Domains to create emails for:
A list of any domains for which email messages should be automatically archived to the FileNexus System. Any email message whose recipient and/or sender has an address that contains one of the listed domains will be archived to FileNexus.



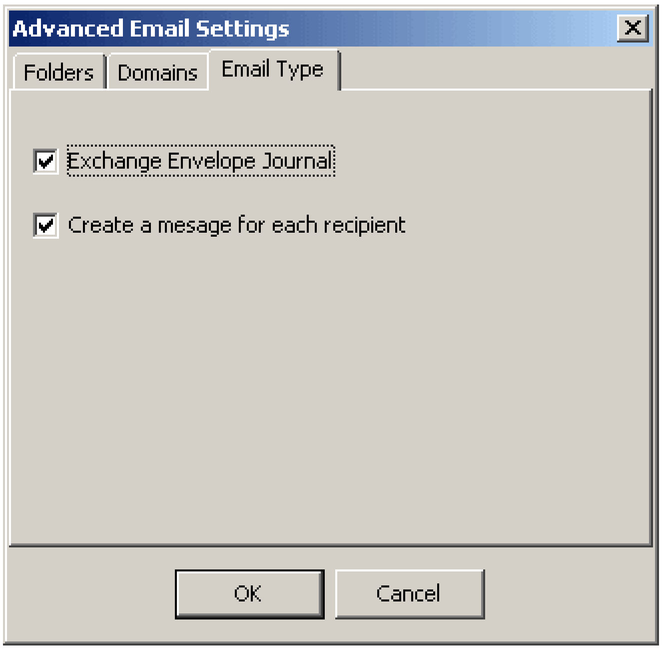
Add
Click **Add** after you enter the name of a Domain in the edit box below the Add/Remove buttons.

Remove
To remove a Domain from the list, highlight the domain and click **Remove**.

OK
Click **OK** to save your changes.

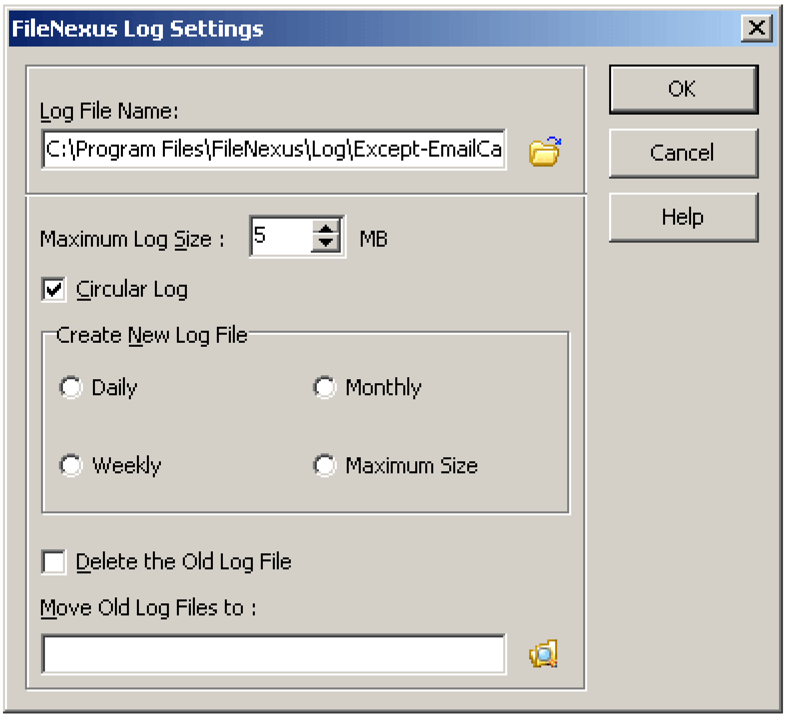
Cancel
Click **Cancel** to ignore your changes.

Email Type Tab



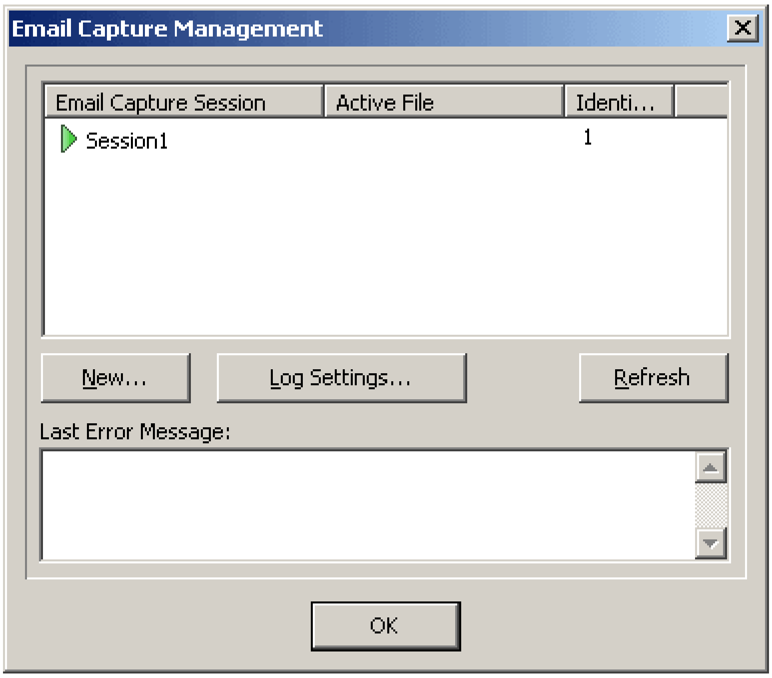
Exchange Envelope Journal
By checking on this option, FileNexus will use the email's Envelope Journal (Journaling must be turned on in Exchange) to extract index information from emails to be archived. If this option is checked off, FileNexus will extract index values through the metadata embedded in the email. Typical indexes will include the Sender, Recipient, Subject, Date, etc.

Create a message for each recipient
If this option is checked on, a copy of the email will be stored in FileNexus for each recipient of the email in their own FileNexus folder. If this option is checked off, only one copy of the email will be stored for the sender or author of the email.

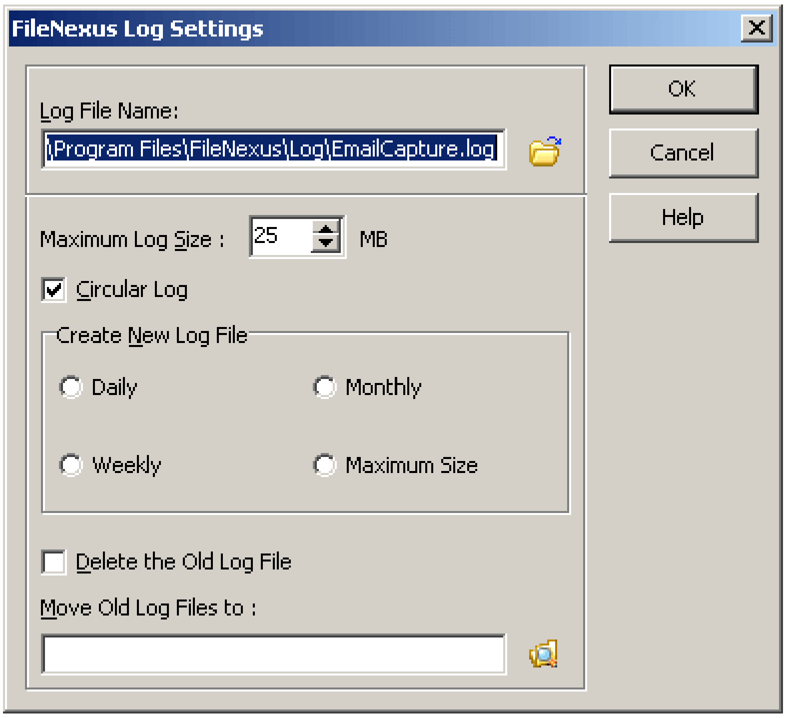


Email Capture Management Log Settings

To access the log settings for your Email Capture sessions, click on the **Log Settings** button in the *Email Capture Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

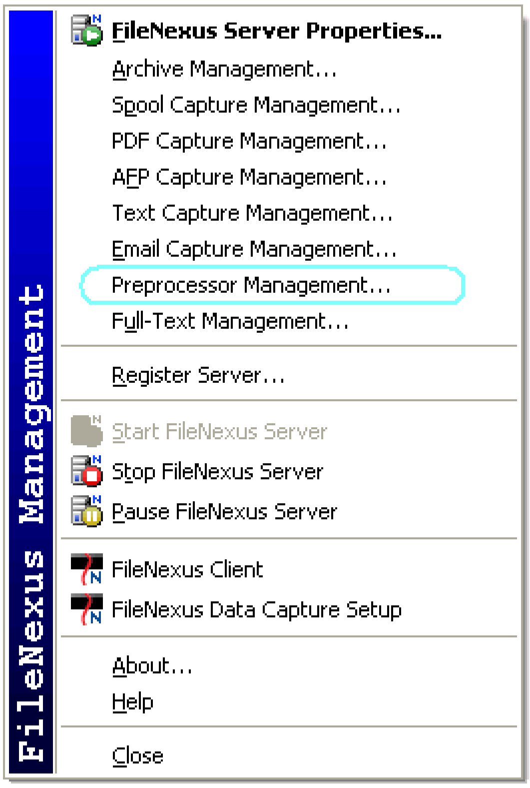
Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Overview

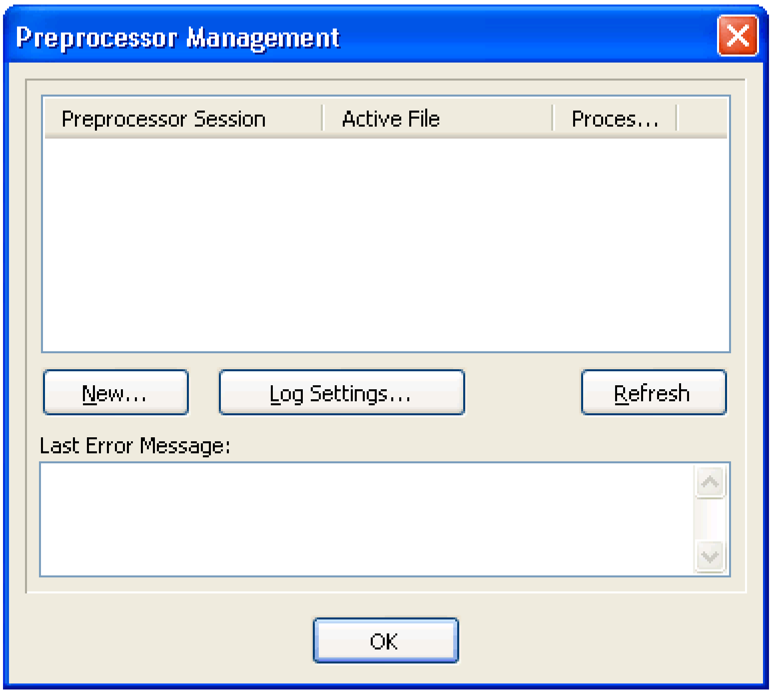
The preprocessor service continually checks to see if any new documents have been put into one or more monitored directories. Any found documents will be processed by executing a VB Script to manage the information in the .nxs file and/or reformat the document. The document and its accompanying .nxs file may then be moved to an archival or identification folder for further processing.



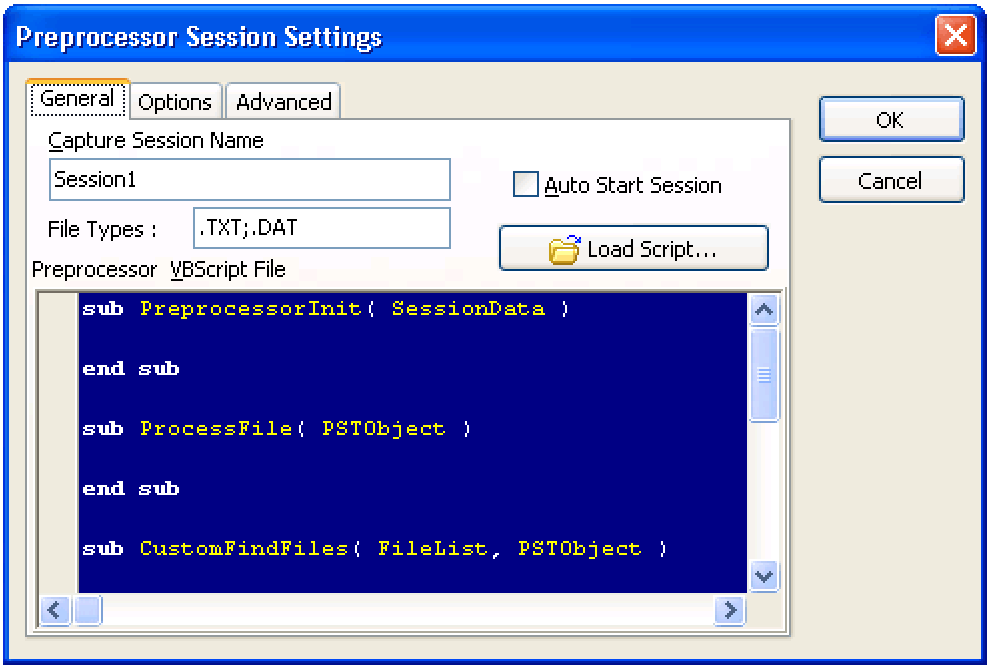
To access Preprocessor Management, right-click on the FileNexus Management icon in your Windows system tray and select Preprocessor Management to launch the Preprocessor Management window.

Creating, Modifying, or Removing a Preprocessor Session

To create a new Preprocessor Session, simply click on the **New** button from the Preprocessor Management window.



The **Preprocessor Session Settings** window will appear.



General Tab

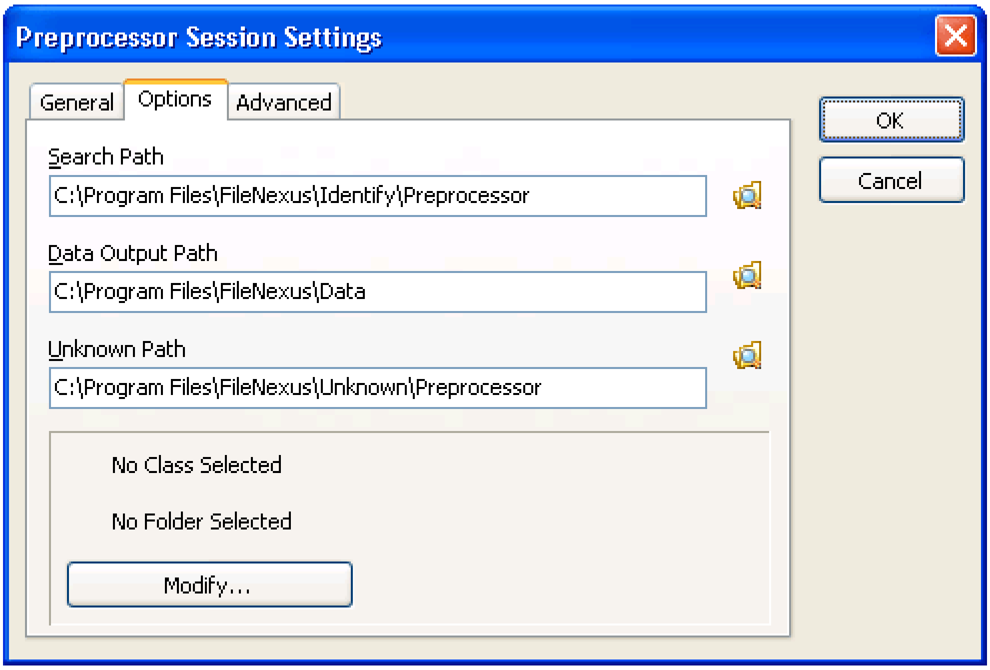
Capture Session Name
Each preprocessor session must have a unique name.

File Types
Specify which file extensions the Preprocessor Session should look for. To specify more than one valid file extension, provide a comma separated list.

Auto Start Session
If this option is checked this preprocessor session will start automatically when the Preprocessor Service starts (usually when the computer starts). If it's not checked, you'll need to manually start the session when you want it to run.

Load Script
Click this button to browse to the **VB Script** that you wish the session to run. This script will be applied to all documents in the session's monitored folder that matches a specified **File Type**. After loading, the script will appear in the **Preprocessor VBScript File** pane.

Options Tab



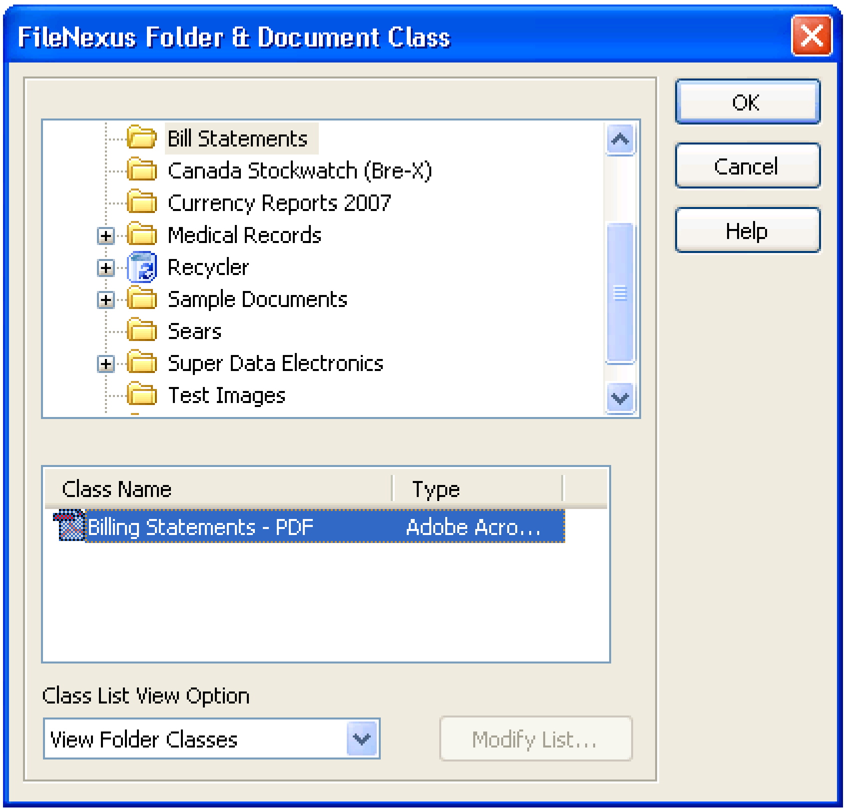
Search Path
This is the directory that the preprocessor session will monitor. If it detects any files (that match a file type specified on the General Tab), it will immediately begin processing the files by running the loaded VB Script. The file along with a matching .nxs file (created automatically by FileNexus) will be moved to the directory specified in the Data Output Path. Note: Any files placed into this directory will be removed once the corresponding Preprocessor Session has processed the files.

Data Output Path
The path you specify in this edit box will be used by FileNexus to route files and their matching .nxs files after the VB Script has completed processing a file. This may be the directory that a Capture Session, File Transfer Session, or Archive Session monitors to continue processing by FileNexus.

Unknown Path
This path is used by FileNexus to route documents to in case files placed in the Search Path do not meet the requirements for a specified File Type. Rather than deleting or

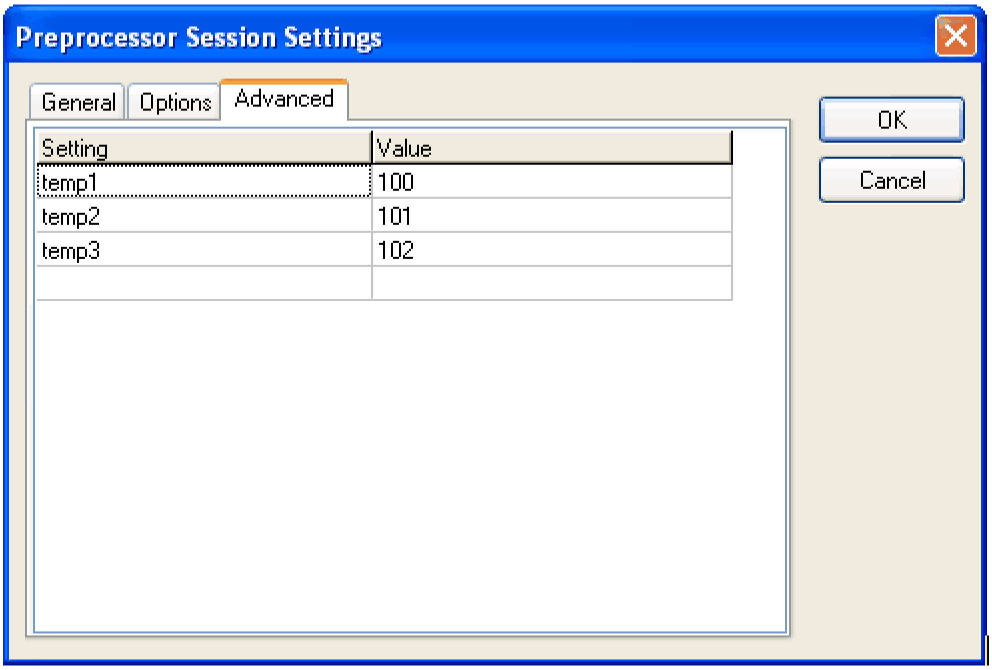
ignoring files that do not match a File Type, FileNexus will move the offending file(s) in an "Unknown" directory.

Modify
Clicking this button allows you to specify the document class for the file and a destination folder within the **FileNexus Client**. Clicking on the Modify button will prompt FileNexus to have you login to the system. After you have logged in, the following dialog will appear.



Navigate to and highlight the destination folder in the top pane, then select the document class name in the bottom pane. If the document class does not appear, refresh the list by selecting **View All Document Classes** in the **Class List View Option** drop down. Then click **OK**.

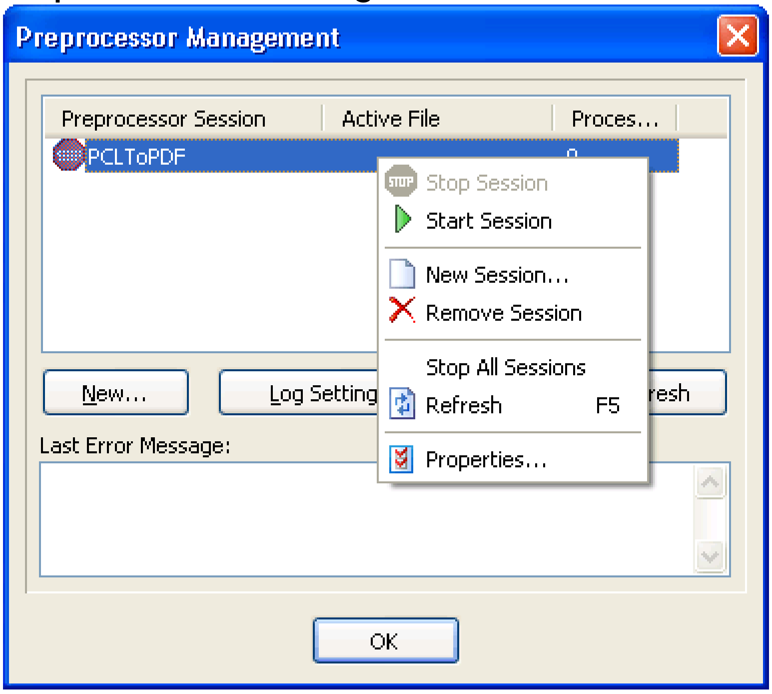
Advanced Tab



Setting
Enter the name of a global variable that can be referenced in the session's VB script.

Value
Enter the value of the variable to be referenced in the session's VB script.

Preprocessor Session Right-click Menu



Right-clicking on a session in the Preprocessor Management window allows you to do the following:

Start Session
Starts an existing Preprocessor Session that is stopped.

Stop Session
Stops an existing Preprocessor Session that is running.

New Session
Allows you to create a new Preprocessor Session by launching the **New Preprocessor Session** window.

Remove Session
Allows you to remove/delete an existing Preprocessor Session that is stopped.

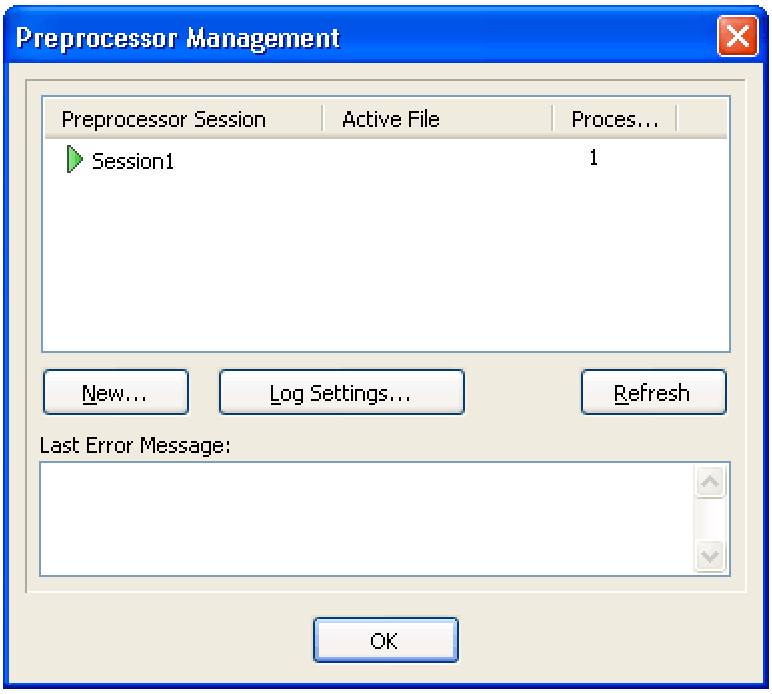
Stop All Sessions
Will stop all existing Preprocessor Sessions that are currently running.

Refresh
Will refresh the number of documents in the Processed column for any running Preprocessor Sessions.

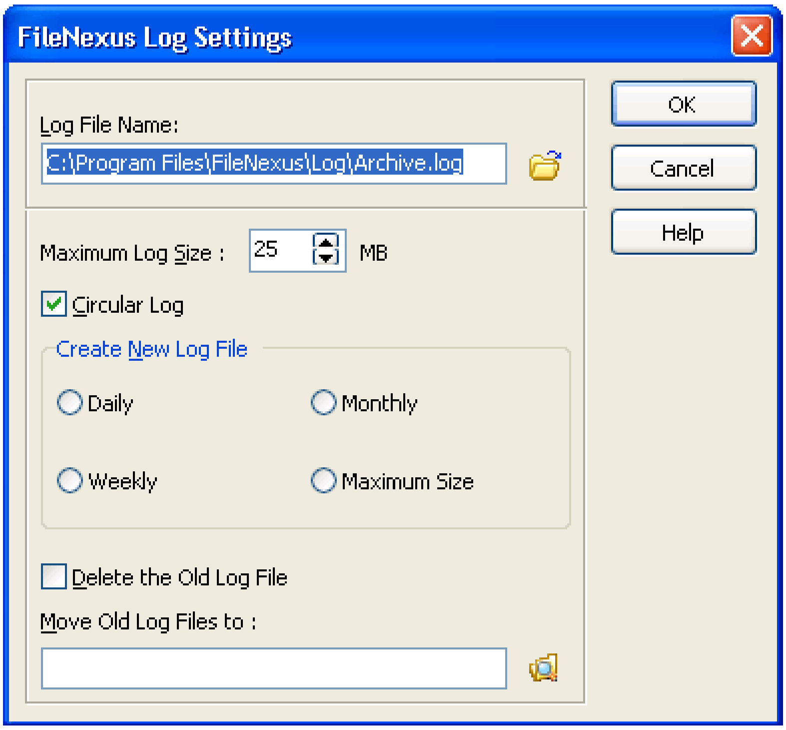
Properties
Will open up the Preprocessor Session Properties window for you to edit an existing AFP Capture Session that is stopped.

Preprocessor Management Log Settings

To access the log settings for your Preprocessor sessions, click on the **Log Settings** button in the *Preprocessor Management* window.



The *FileNexus Log Settings* (shown below) allow you to specify how large you want your log files to grow – or if you want them to be rotated at a certain interval (i.e. have a new log file created every month regardless of size).



Log File Name
This is the path to the archive log file. The file must have the file extension ".log".

Maximum Log Size
You can specify the maximum log file size in MB by entering it in the text area next to *Maximum Log Size:* or by using the up and down arrows to increase or decrease the size in MB.

Circular Log
Check this option if you want the log file to be overwritten and start again once it reaches the specified maximum log size.

Create New Log File
Click on the appropriate radio button to choose how/when you wish a new log file to be created. Check **Daily** if you want a new file every day, **Weekly** for once a week, **Monthly** for once a month, or **Maximum Size** to wait until the log file reaches the specified maximum log size.

Delete the Old Log File
Check this option if you want the old log file for archive sessions to be deleted when a new one is created.

Move Old Files to:
Instead of deleting old log files, you can specify a valid network path to have the old log files moved to for long term storage.

Full-Text Indexing Overview

Full text indexing works with most Microsoft PC documents (word-processing files, spreadsheets, PDFs etc.) and text documents that have been archived into the FileNexus system. If a document has been full text indexed, you can search and find the document, using any word or combination of words found within the document. Because the documents have been indexed, search speeds are very quick.

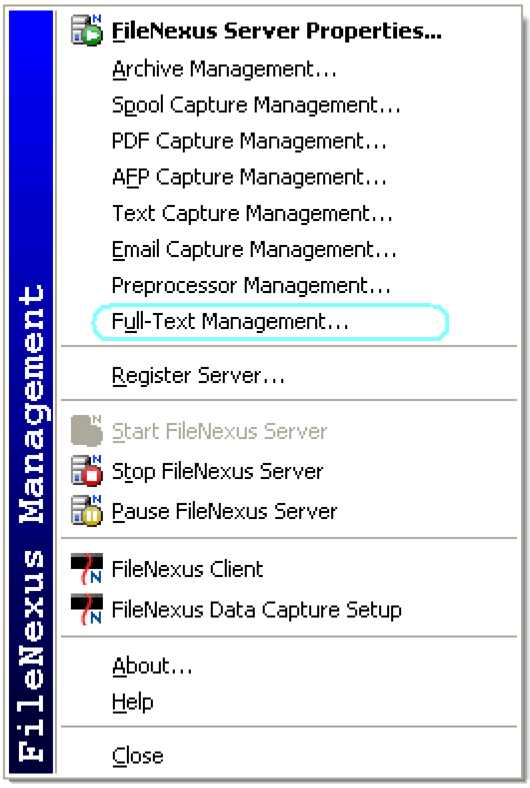
Full text Indexing is broken down into two sections.

1. The Full-Text Indexing Service, which actually does the indexing.

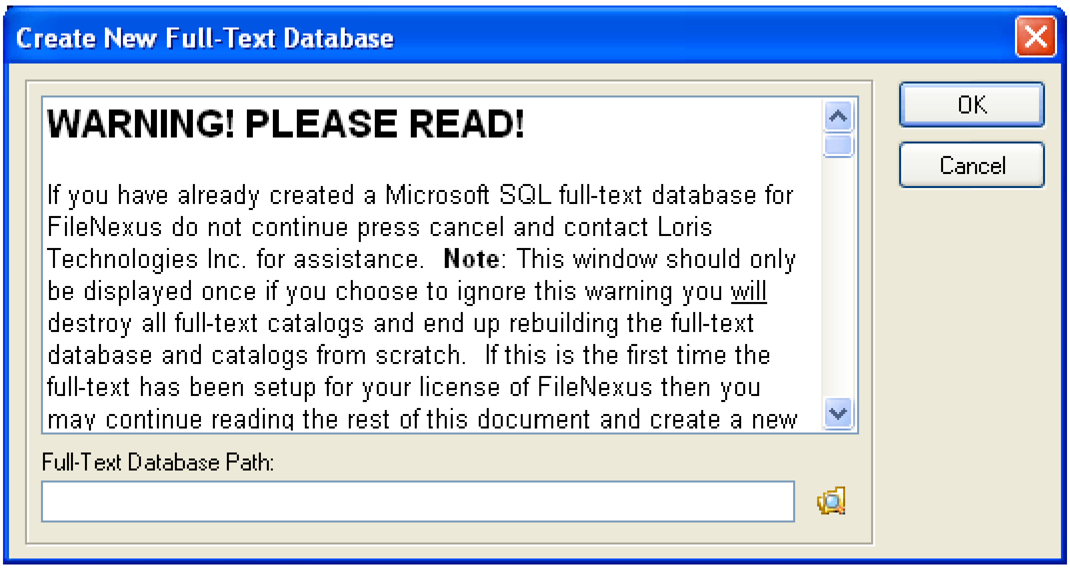
2. The Full-Text Indexing Manager, which allows you to schedule when indexing will occur and which document types will be full text indexed.

Full-Text setup

After installing or upgrading your FileNexus server you must create a Full-text database. Failing to do so will cause an error when client applications connect to the server and attempt to do a full-text search. To create a Full-text database, right click the FileNexus Management Icon and select **Full-Text Management**.

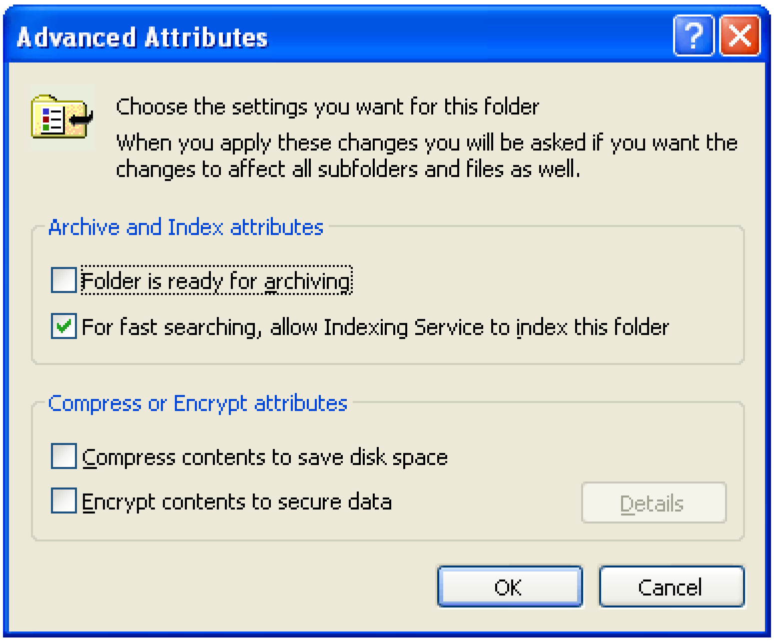


If you are installing or configuring the FileNexus Full-Text for the first time the following dialog will appear.



It is advised that you read all the documentation provided in this window. Once you have decided where your Full-Text database will be stored enter the path name and press **OK**.

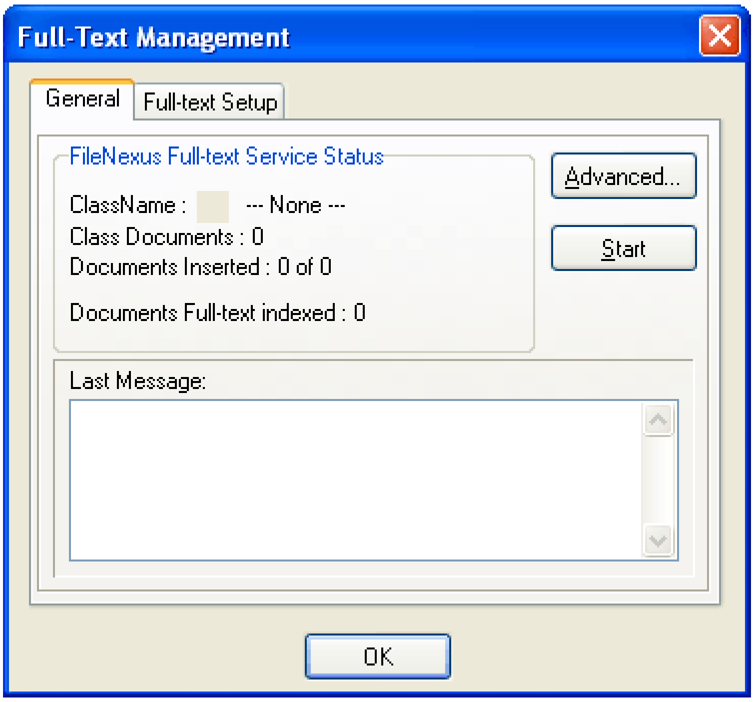
NOTE: Because the **Full-Text Database Path** may contain a large number of large files as time goes on, you should right-click on the folder and select **Properties**. Then, on the **General** tab, click on **Advanced** and check ON the option for **Compress contents to save disk space** and hit **OK**.



After you hit **OK** on the **Create New Full-Text Database** window, the Full-Text Management window will appear.

General Tab

The FileNexus Full-text Service only inserts text into the full-text database and does not do actual indexing; the Microsoft Search Service does this. It is not necessary to have the Microsoft Search begin a full-text population as each document class has "Change Tracking" and "Update Index in Background" enabled by default. This means that as the FileNexus Full-text Service inserts text into the database the full-text catalogs are being automatically being updated.



Advanced
Clicking on this button will open up a FileNexus Log Settings dialog where you can adjust your Full-Text log settings.

Start
This will start the FileNexus Full-Text Service. The numbers for **Class Documents**, **Documents inserted** and **Documents Full-text indexed** will increase/adjust as FileNexus combs through documents archived to FileNexus that have not been inserted yet into the Full-Text Database.

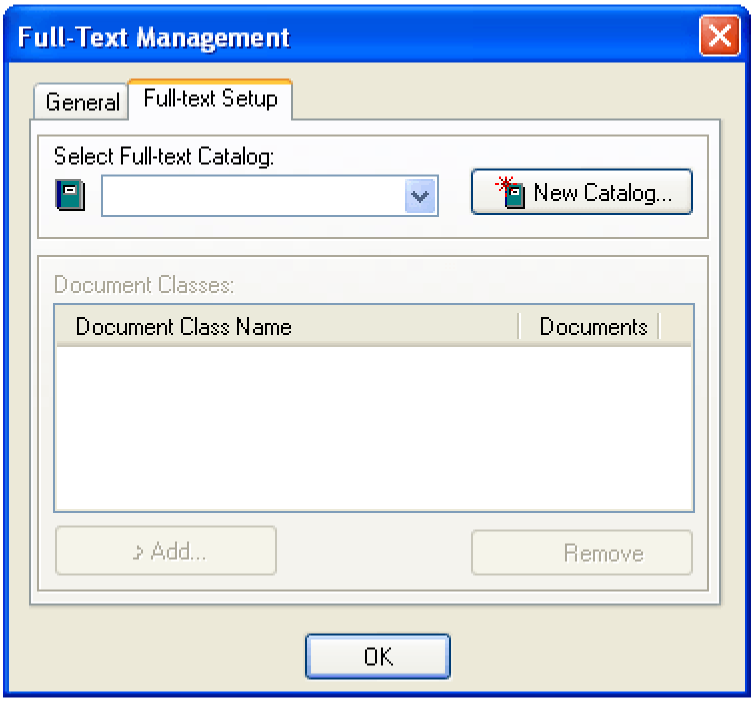
OK
Clicking on this button will close the **Full-Text Management** window.

Next Step: In order for FileNexus to know which documents it needs to have full-text indexed, you must create full-text catalogs and select the **Document Classes** for each catalog before being able to use full-text searching in the **FileNexus Client**.

Adding a Document Class for Full-Text indexing

To start, click the **Full-text Setup** tab to view all catalogs and document classes. If this is the first time you have run the **Full-Text Management** window you will need to add a full-text catalog.

To create a new catalog, simply click on the **New Catalog** button, enter a catalog name, and then select the directory the full-text catalog will be saved into. Remember MS SQL can only have 256 catalogs per *Server*.

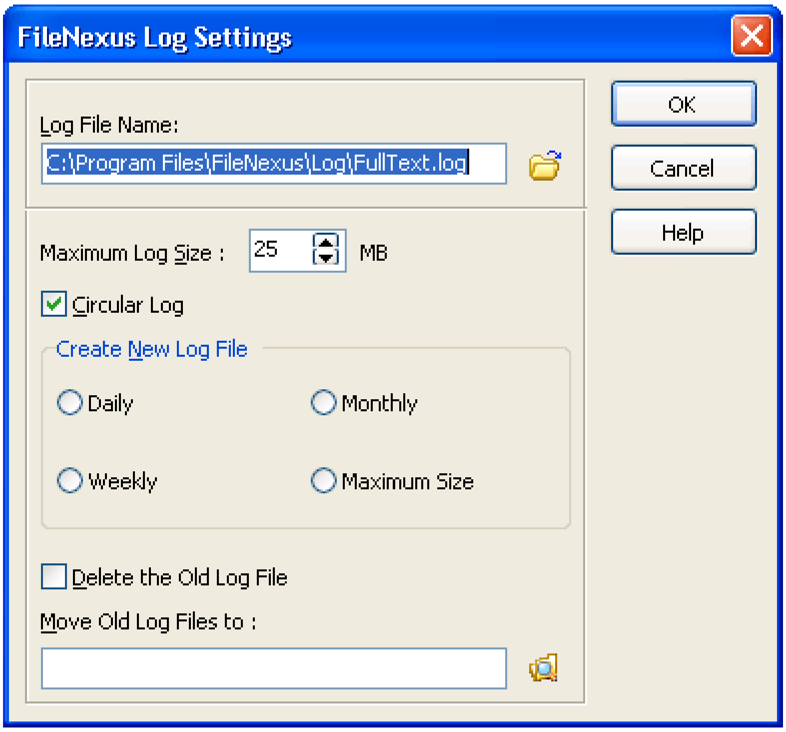


Once a Full-text catalog is created press the **Add** button to select a class that will be used for full-text indexing. Only classes that contain at least one archived document will be displayed. After a document class has been selected you may continue to add more document classes. Each catalog can contain many different document classes. If some of your document classes have millions of records archived to them, then it's probably a good idea to create a separate catalog for each of those document classes.

Full-Text Logs

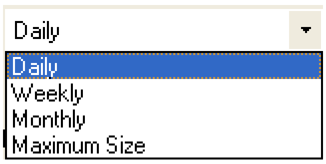
To access the **Log Setting** window, you must click on the **Advanced** button from the General Tab in the **Full-Text Management** window.

A window similar to the one below will appear. There are two ways you can rotate your log files. The first way is specify how often you want your full-text logs to be rotated. For example, selecting monthly means that each month FileNexus will create a new full-text log file. The second way is to specify a maximum log file size.



Maximum Log Size (Circular Log should be checked ON)
Sets the maximum threshold for the log file size. A circular log will begin to be overwritten once the threshold is met.

Create New Log File (Circular Log should be unchecked)
Selecting the period for which a new log should be created, **Monthly** for example, means that each month FileNexus will create a new Server log file.



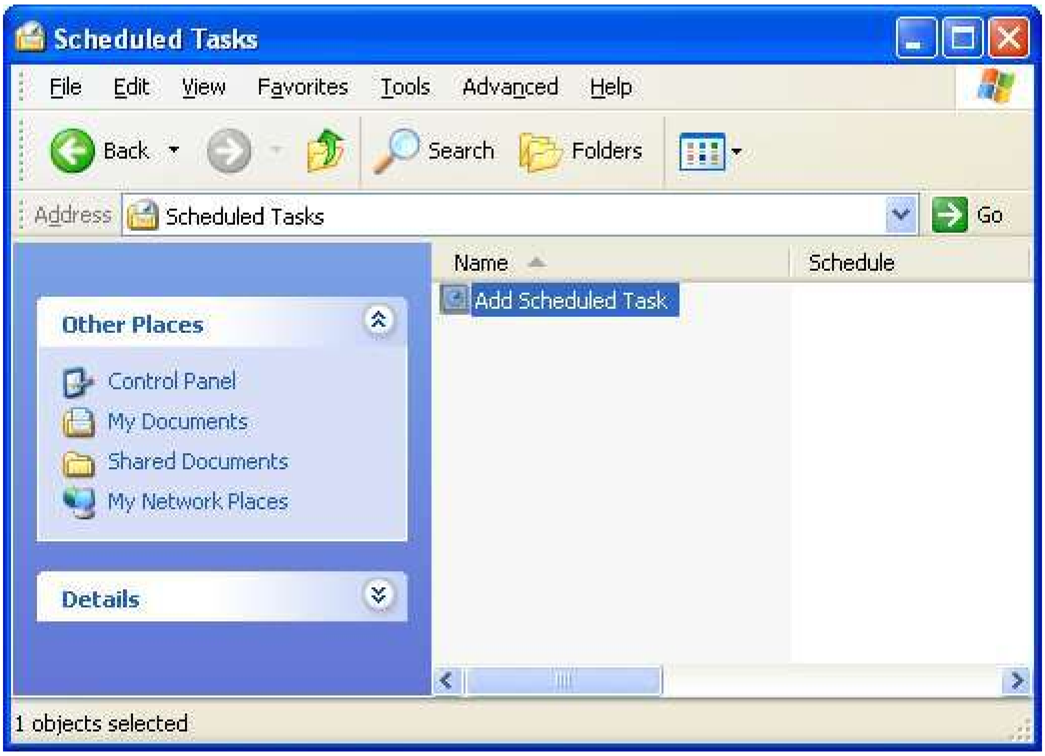
Delete the Old Log File
When checked ON, will automatically delete old log files.

Move Old Log File to
Allows you to specify a directory in which to save old log files.

Scheduling FileNexus Full Text Service

The full-text indexing service, when started, will index all documents flagged to be indexed. Once the indexing is complete, the service will then stop.

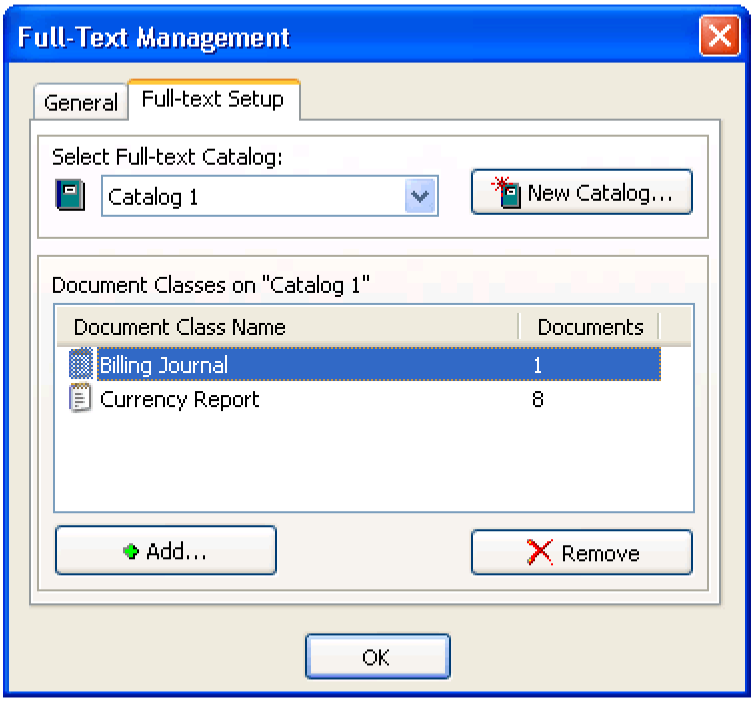
To automate the running of the service, you can schedule your server to run the "FullTextStart.vbs" file located in the FileNexus installation directory at a predetermined interval (like every hour) or at a specific time (like 11pm every evening) using the **Scheduled Tasks** utility provided in the Windows **Control Panel**.



Depending on your organization's needs, you may wish to schedule the task to run every 20 minutes, hourly, daily, or at a specific time each business day.

Removing Full-Text Indexing

If you no longer require a document to be Full-Text Indexed simply select Full-Text Management from the **FileNexus Manager** and click on the **Full-Text Setup** tab. Select the Catalog from the drop-down and highlight the Document Class you no longer need to be Full-Text indexed and click on the **Remove** button.



When you are finished, click on the **OK** button to close the window.

Retention Management

The Retention Management feature allows a FileNexus administrator to setup one or more rules for FileNexus document retention. When these rules are executed, all FileNexus documents matching the criteria of the retention policy will either be moved to a new folder or deleted from the FileNexus System, depending on the policy settings.
The Retention Policy will act on a selected set of folders and document classes, which are defined when the policy is created. The policy relies on an index field that is in the Date format to compare against and determine which documents to act on. Any record in that document class(s) and folder(s) will be moved or deleted when the policy is executed.

Setting up a Retention Rule

1. To access the FileNexus Retention Policy settings, select Retention Management from The FileNexus Management context menu available by right-clicking on the FileNexus Management icon  in the Windows System Tray.