FileNexus Web Client
Administration Manual
Version 6.8

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Overview

The FileNexus Web Client is a web based alternative to using the FileNexus Client for searching, viewing, and managing documents archived to FileNexus. By providing users a web page to log into the FileNexus Web Client, administrators can quickly deploy an end-user document management tool and archival application without needing to install or upgrade software on end-user PCs.

Similar to the FileNexus Client application, the Web Client boasts a dynamic Search Results Grid, allows printing, downloading, annotation, and movement of documents, enabling users to customize their document management experience. The Web Client also provides the ability to conduct business processes or workflow through an easy to use and customizable interface. Users can quickly manage approval processes, data distribution, automatic email notifications, updating host systems, and keep abreast of outstanding items using the “My Tasks” feature. As with any FileNexus application, a user must first login to the Web Client to access any documents within the FileNexus System.

In addition to being a handy document management tool, users can now easily upload or archive new documents to their FileNexus system using the Archive Wizard add-on to the Web Client. Organizations with the Web Client and PC Data Module can upload new documents directly from any PC to FileNexus.

FileNexus Web Client Login

Starting the Web Client

To launch the Web Client, simply open your Web Browser (Internet Explorer 8 or higher, or the latest versions of FireFox or Google Chrome) and navigate to the Web Client URL. Typically, the URL will be of the format https://MyFileNexusServer/FileNexus/BrowserClient where "MyFileNexusServer" will be the name or IP Address of your organization's FileNexus Server (or the server on which the Web Client is installed).

Most organizations will set up a Desktop Shortcut to the Web Client for users. Alternatively you may bookmark the web address for easy access to the Web Client.

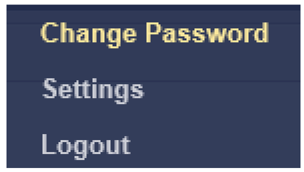
Regardless of the method that is used to access the FileNexus Web Client, you will require a valid FileNexus user name and password to log into the Web Client. Once you have navigated to the Web Client's page, enter your user name and password in the space provided and click **Login**. If you wish for your PC to remember your user name for subsequent logins to the Web Client, check the **Remember my Username** option before logging in.

If your organization is using *Single Sign On* authentication, you will be logged into the Web Client automatically if you have already signed onto the PC with a valid domain account and password.

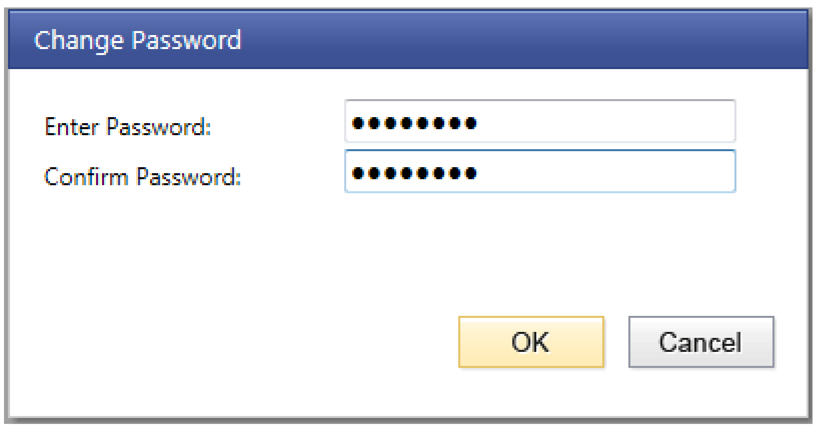
Similar to the FileNexus Client, the Web Client allows users to quickly search for, and view archived documents in the FileNexus System. The following sections will review the searching, viewing, and document management features available to FileNexus users in the Web Client.

Changing Your Password

Once a user is logged into the FileNexus Web Client, he or she may then elect to change his/her password. To change your password, go to the drop down menu under the username in the right hand corner of the FileNexus Web Client. Select the 'change password' option from the drop down menu.



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



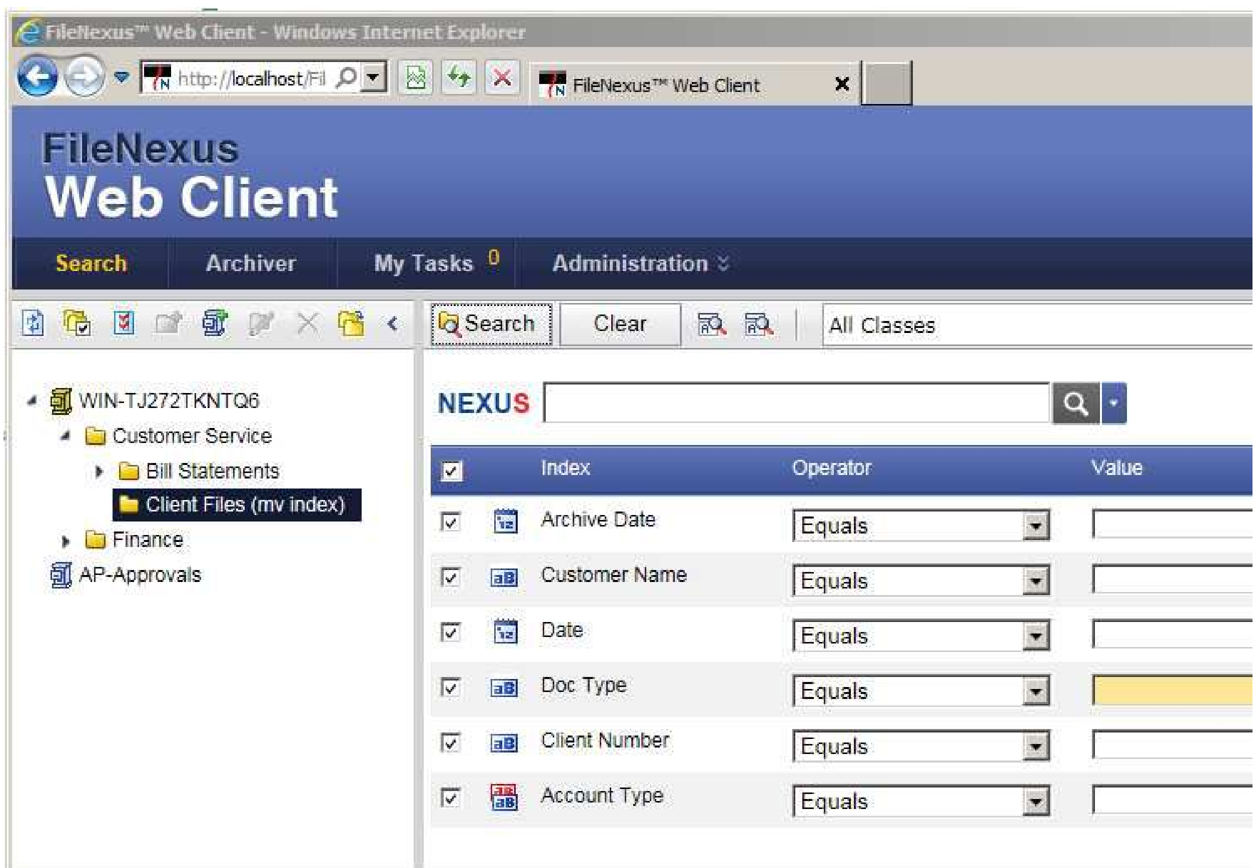
NOTE: A user may only change their password if they have security rights to do so, as set up by the FileNexus Administrator or a user set up as the Manager of that user or a group in which the user is a member. FileNexus password changes will have no effect if Active Directory Authentication is being used for logging into FileNexus.

The Folder Tree

The Folder Tree is a visual representation of how your documents are grouped or organized. Different users in various departments of the organization may have access to one or many folders within the structure. By selecting a single folder, you will be able to search on its contents, as well as the contents of possible sub-folders. From the Folder Tree pane, you will also have access (depending on your rights within the FileNexus System) to various document management functions via the Folder Tree Toolbar.

Folder Tree Toolbar

There are several icons in the Folder Tree toolbar that can help you manage and adapt your FileNexus environment. In addition, the Folder Properties window allows administrators to manage User and Group access to documents at the Folder and Index levels.

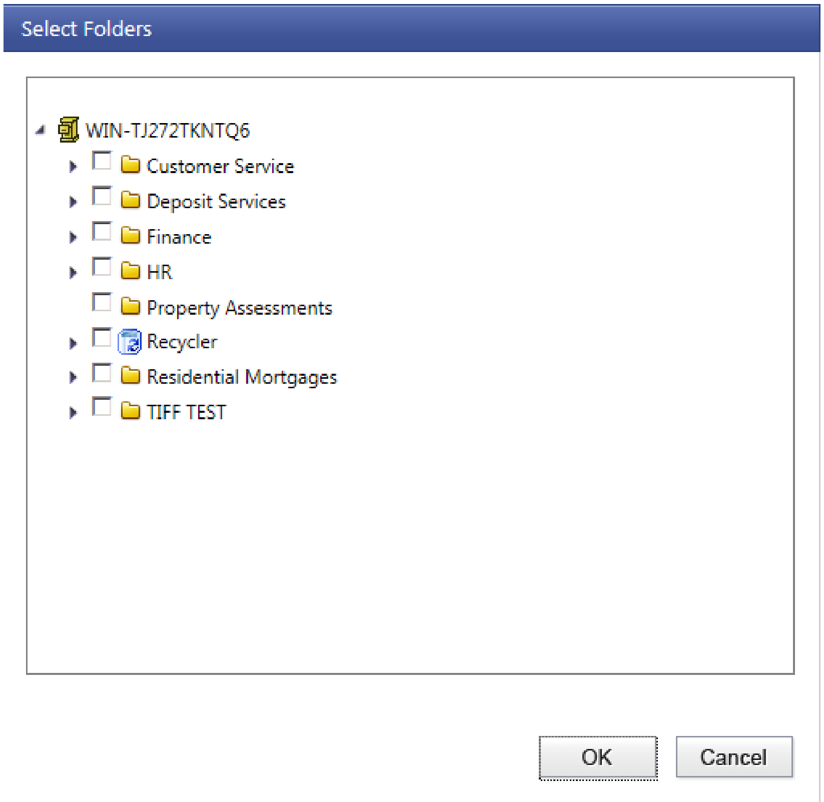


Refresh

By Clicking on the Refresh icon, you will refresh the folder tree after any folder additions, deletions, or movements take place.

Select Multiple Folders

By clicking on this icon, another window will pop up allowing you to select multiple folders and thereby providing the ability to conduct a “Cross Folder Search” when folders may not be organized under the same parent folder.



Folder Properties

By highlighting a folder and clicking on this icon, you will be able to view the properties (Document Classes of documents within the folder, Index IDs, Folder ID). FileNexus administrators can also manage User/Group level access to the documents in the folder. Please refer to the section on Folder Administration for more information.

Add Folder

If you have the appropriate rights in FileNexus, you may see the Add Folder icon enabled. To add a folder, simply highlight the folder or name of the server under which you wish to add the folder. Then, click the Add Folder icon and name the folder.

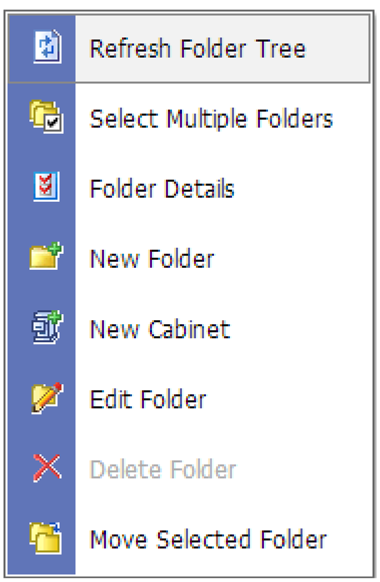
File Cabinet
The File Cabinet icon allows you to access or set up a custom File Cabinet for your own searching needs. This feature is useful when performing regular cross folder searches.

Edit Folder
By highlighting a folder and clicking this icon, you can edit or rename an existing folder provided you have the appropriate user rights.

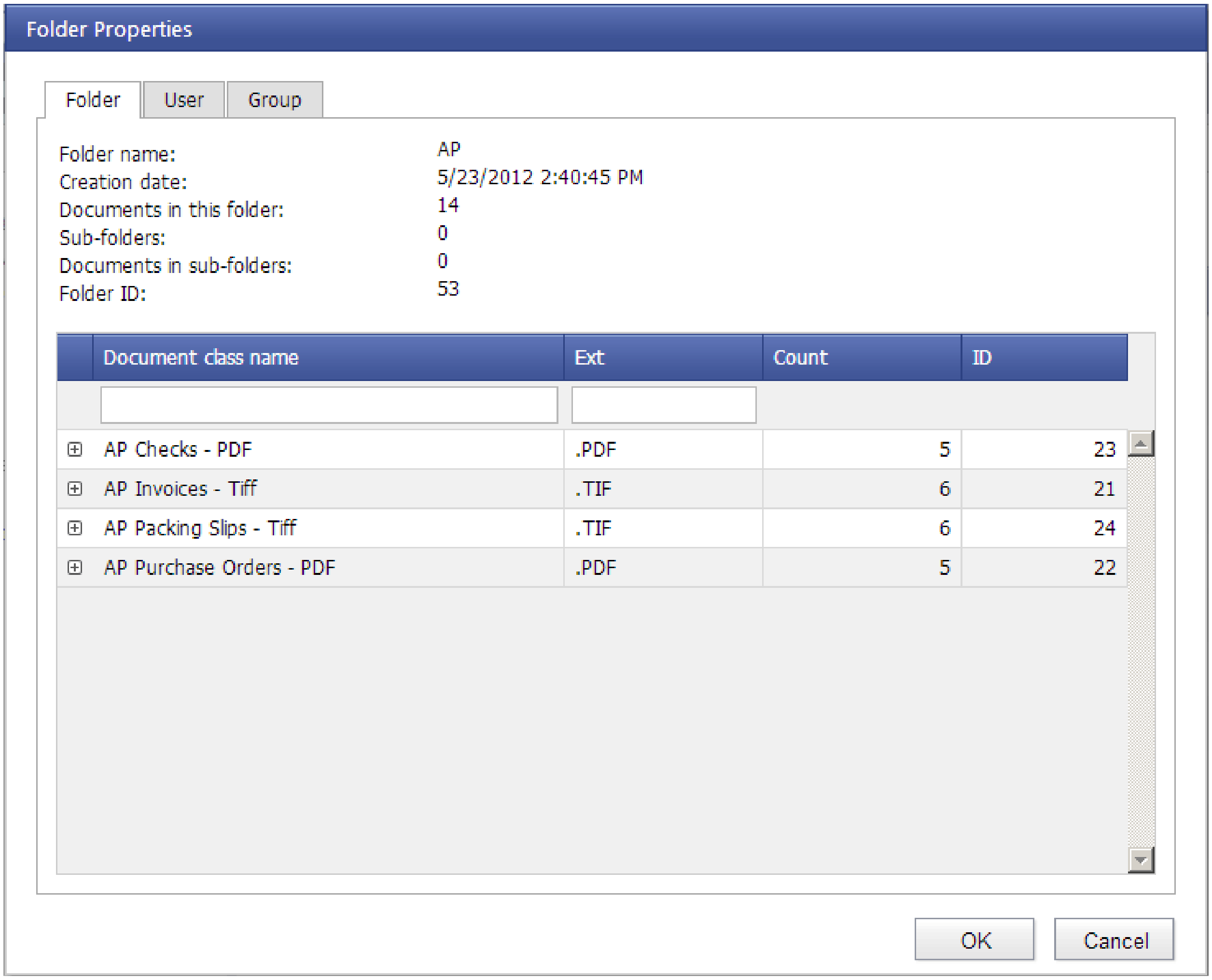
Delete Folder
By highlighting a folder and clicking this icon, you can delete a folder that has zero archived documents within it provided you have the appropriate user rights. Also, the folder must NOT have any subfolders in order to be deleted. Any subfolders must first be deleted before a parent folder can be deleted.

Move Folder
By highlighting a folder and clicking this icon, you can move a folder to another location in the folder tree provided you have the user rights. A window will pop up asking where you wish to move the folder to. Click **OK** after you make your selection or **Cancel** if you don't wish to move the folder.

NOTE: Depending on your user rights in FileNexus, some or all of the options in the Folder Tree tool bar may also be accessed through a convenient right-click menu.



Folder Administration

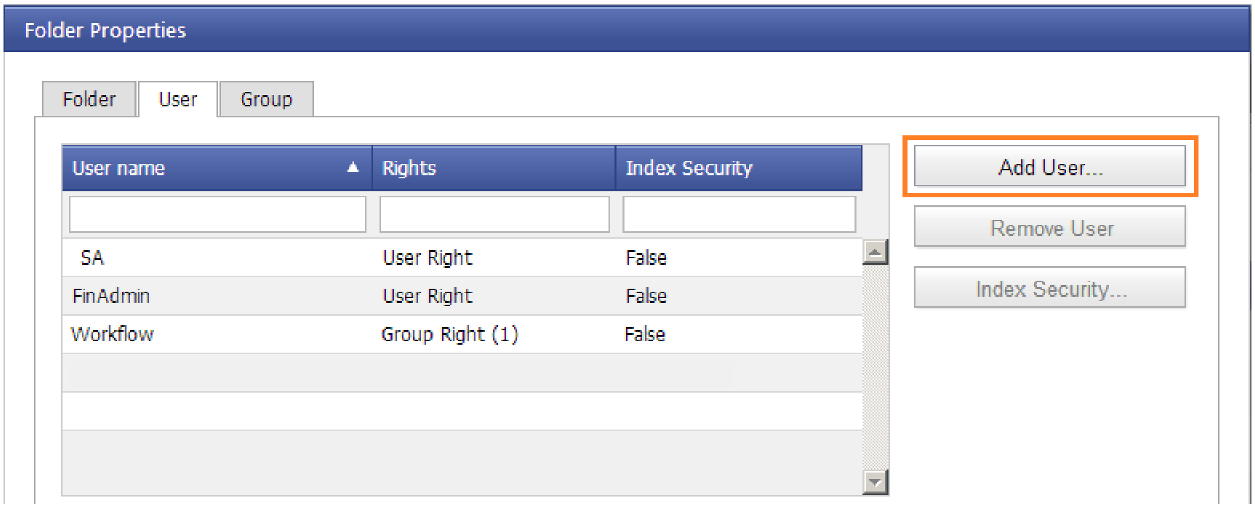


Folder Administration encompasses the granting of access rights to Users and Groups on documents archived to the FileNexus System. These access rights are also used to determine a user’s ability to archive or import documents into the system by using the Scan Station, Client Archiver and Web Archiver applications.

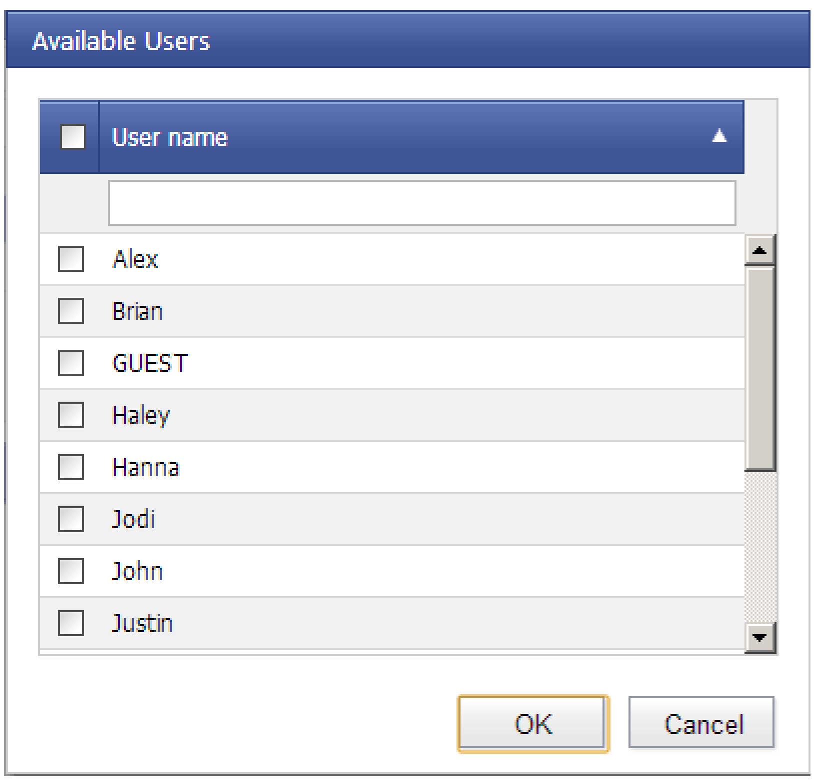
By selecting the User or Group tab, you'll be able to view and modify the access rights of the users or groups to documents within the folder. The access rights defined for a particular user or group will appear in the pane with checkboxes checked on/off next to the specific type of access.

Configuring the User tab

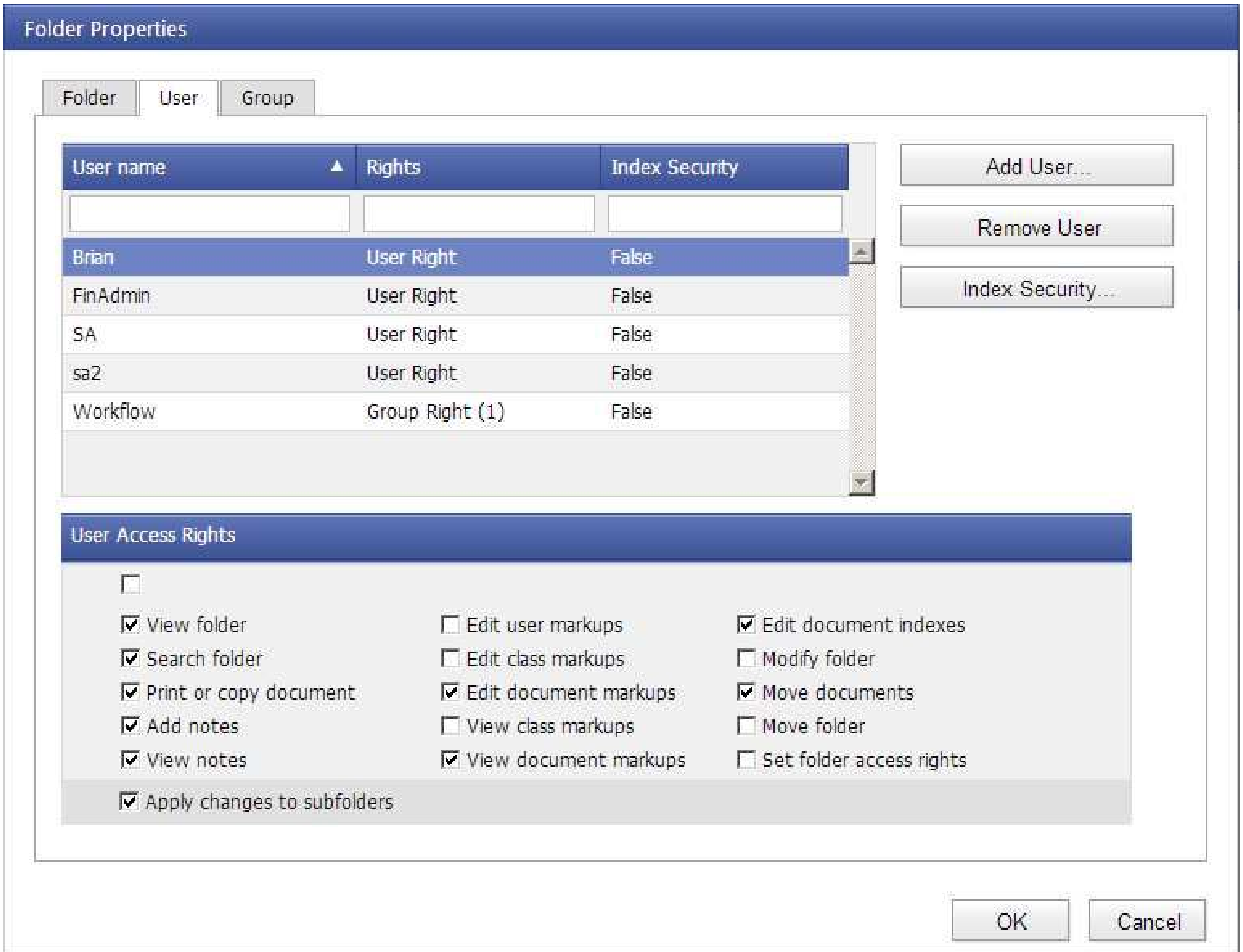
To add a user to a folder, click on the **Add User** button on the User tab as shown below.



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

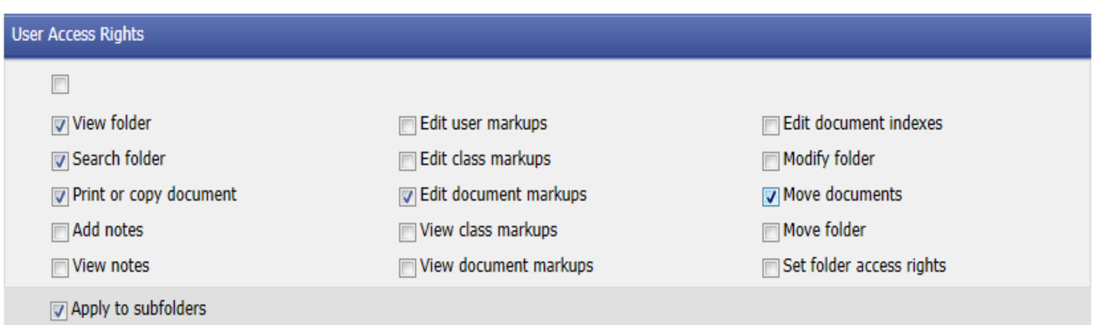


From the User List window, highlight the user you wish to add to the folder and click the OK button. Once the user has been added, you will be able to grant their user access rights for this folder.



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

There are a total of 16 types of user access rights that can be granted. A complete list of access rights is shown below.



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

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

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

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

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

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

Modify Folder
Allows a user to change the name of a folder.

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

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

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

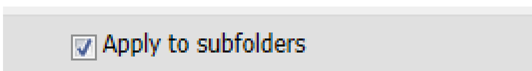
Set Folder Access Rights
Allows a user to change a folder's access rights (i.e. Specify which users can view documents in the folder and what rights they have over the documents that they can view).

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

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

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

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

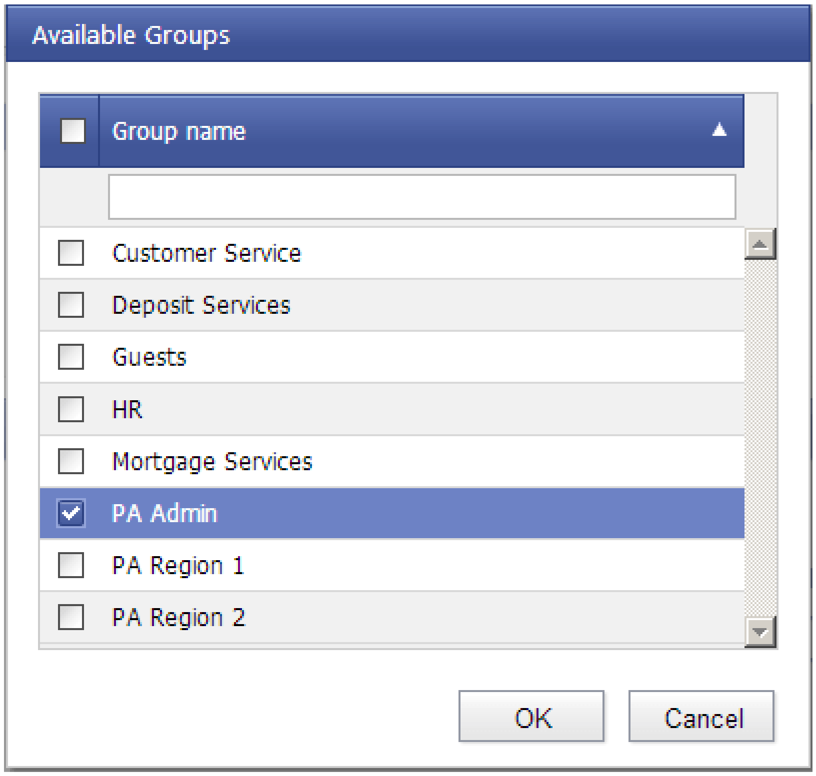


By checking this option, any existing sub folders of the folder you are modifying will inherit the same user access rights you've applied to the folder whose properties you are modifying. If you add sub folders to a parent folder at a later date, they will not automatically inherit the access rights of the parent folder. Conversely, if you add user access rights to a folder that is the child or sub folder of another folder, the user will automatically be granted viewing rights to the folder to allow for navigation to the sub folder. He/she may not, however, have searching or other access rights to the parent folder unless granted further access.

Configuring the Group tab

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

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



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

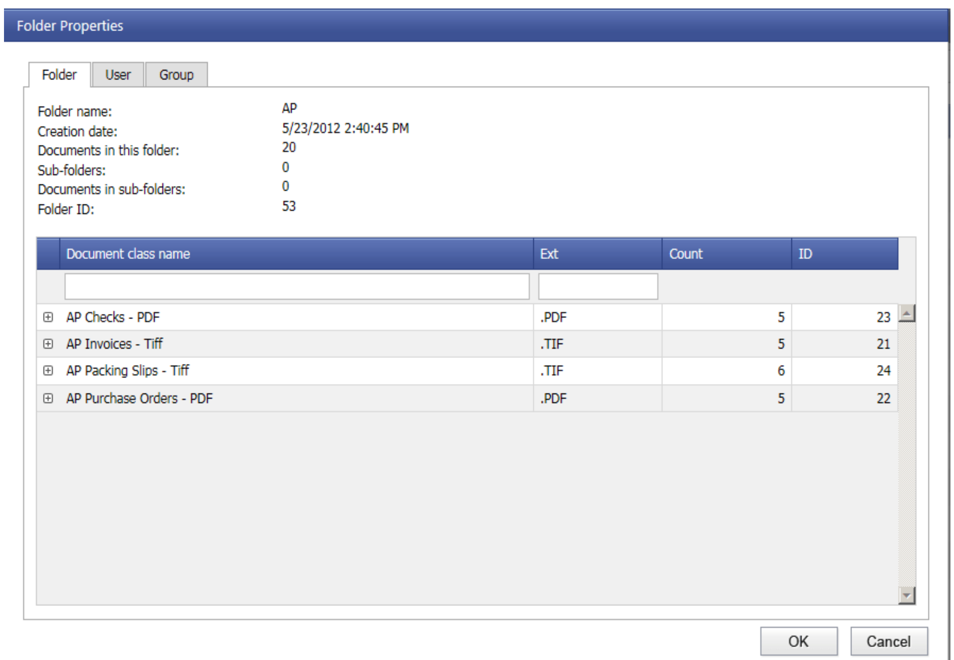
There are a total of 16 types of group access rights that can be granted, which are the same as the user access rights as previously described in this document.

Index Level Security

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

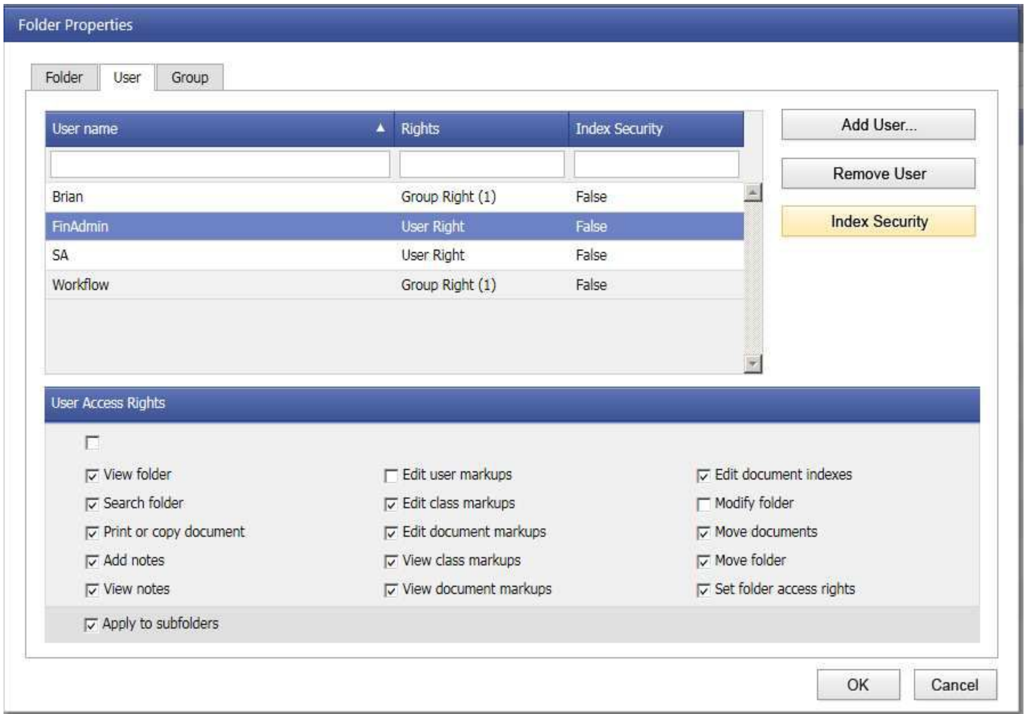
For example, if many users from the Sales Department were given Folder Level access to a Quotes folder, a user may only see his/her own quotes within the folder if it had been set up with Index Level Security based on the Author or Contact Name index for the quote.

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



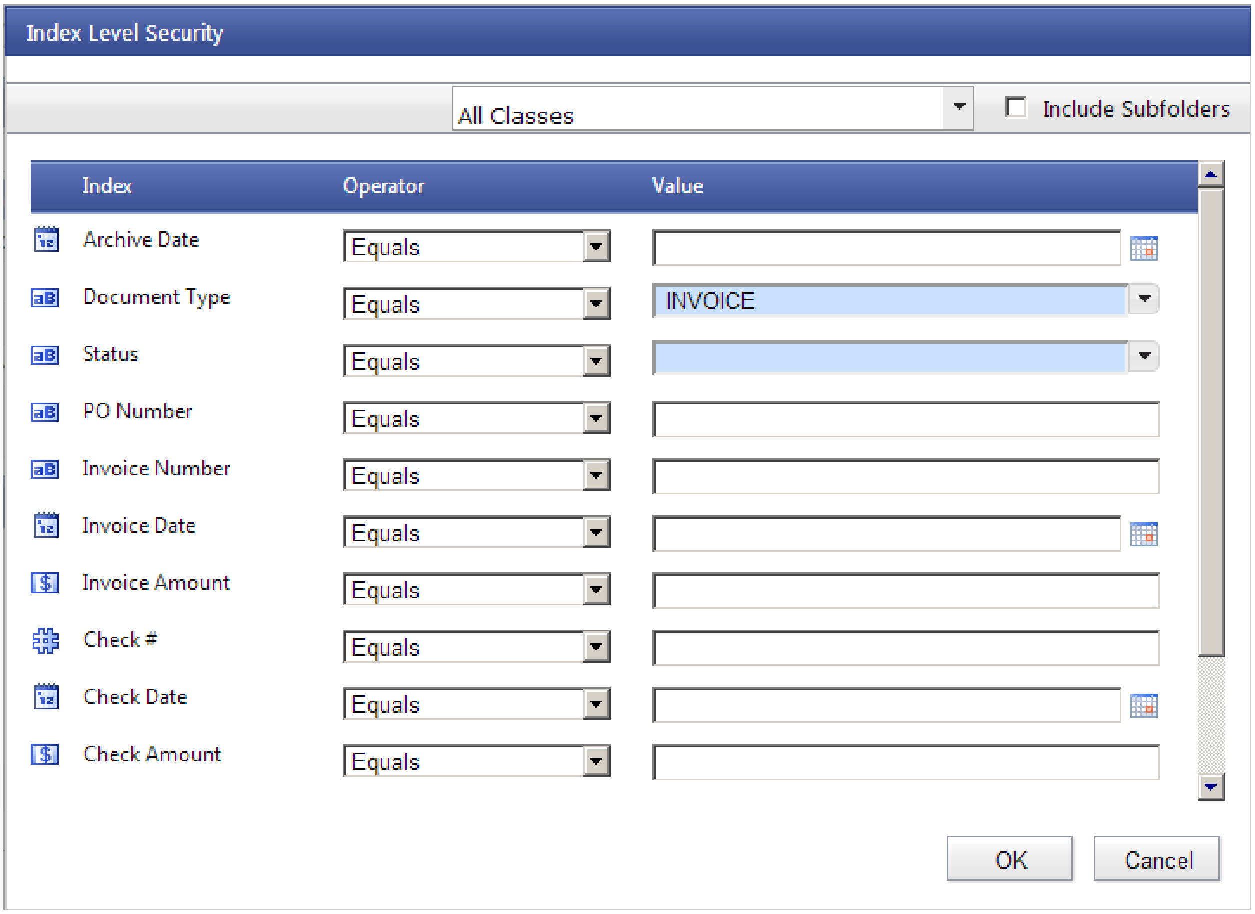
If Index Level Security needs to be applied to a user, select the User tab. Conversely, if Index Level Security needs to be applied to a group, select the Group tab.

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

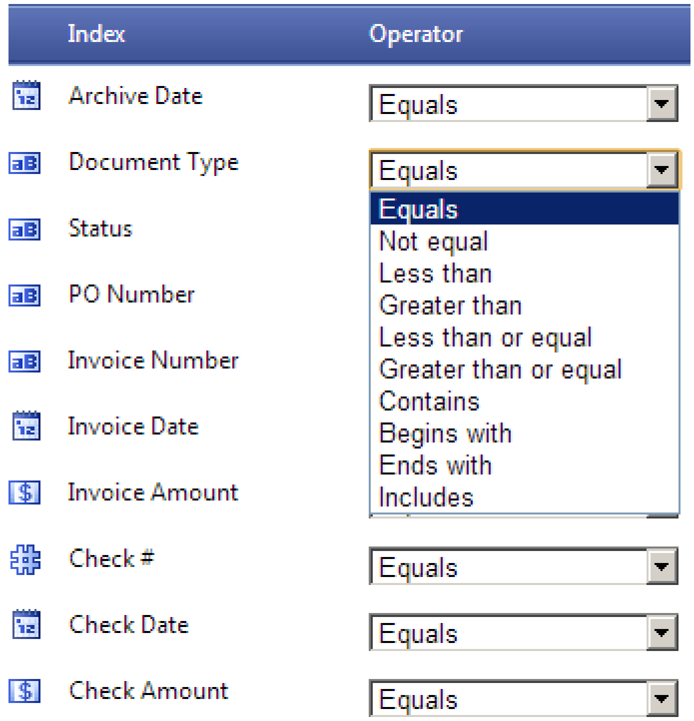


In the Index Level Security window, select the Document Class for which you would like to setup Index Level Security. Once the class has been selected, enter any relevant Index value criteria. The criteria will determine which documents user FinAdmin will be permitted to view. Click on **OK** to save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

In our example below, FinAdmin will be able to search for and view AP Purchase Orders – PDF documents in the AP Documents folder that have a PO Number equal to "1234".



NOTE: The Operators drop down list contains the same operators as the drop down list on the Index Search pane with one exception, the "Includes" operator. The "Includes" operator allows you to enter a series of acceptable index values when setting up index level security, by employing a comma separated list instead of a single value like "INVOICE" in the above example.



Once you have completed Index Level Security setup, and you return to the User tab in the Folder Properties dialog, you will now notice that the user FinAdmin value is set to 'True' in the Index Security Column. This value indicates that FinAdmin has Index Level Security applied to her access rights for documents contained in the AP Documents folder.

User name ▲	Rights	Index Security
Brian	User Right	False
FinAdmin	User Right	True
SA	User Right	False
sa2	User Right	False
Workflow	Group Right (1)	False

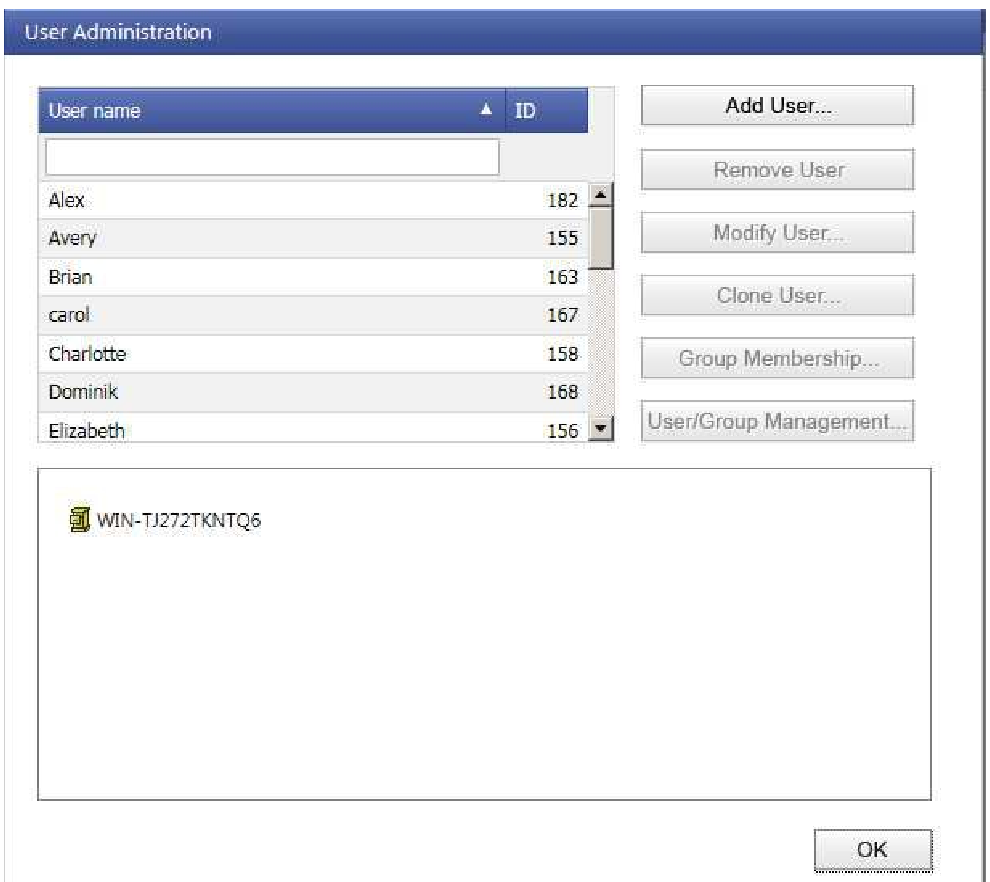
To add Index Level Security to a Group, simply replicate the previous steps using the Group Tab.

User Administration

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

User Administration Dialog

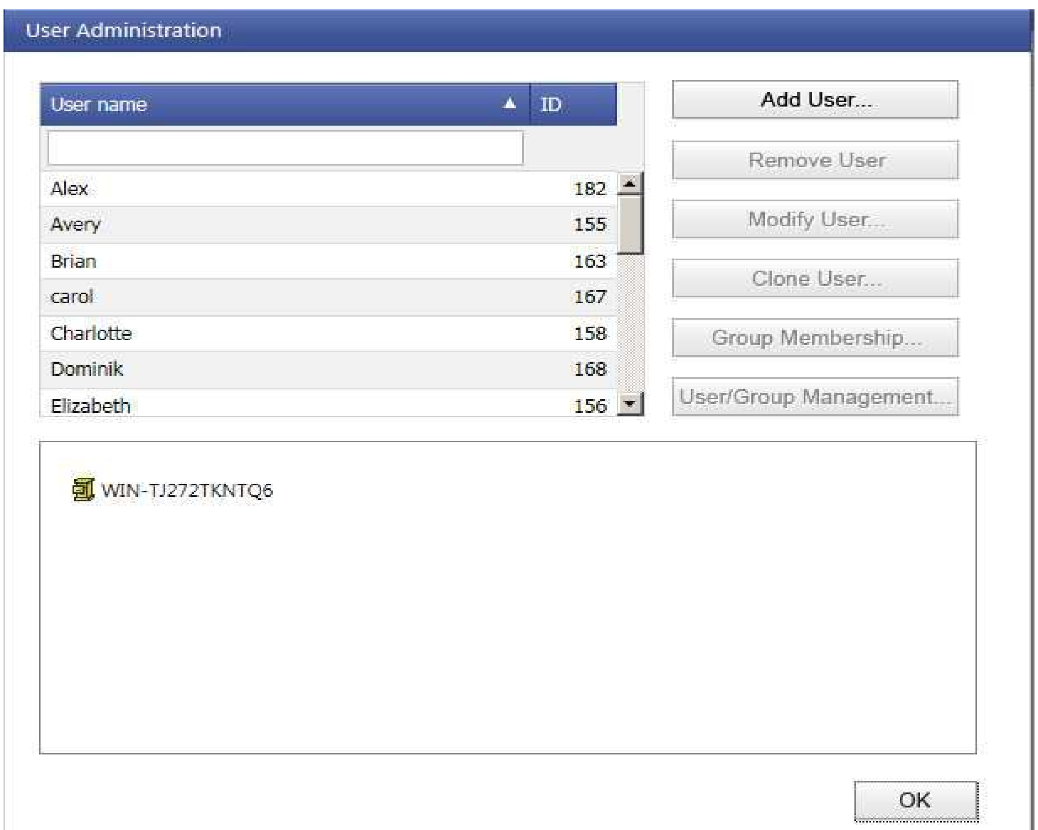
The User Administration dialog can be used to add, delete, modify, or clone FileNexus users. In addition, you can add users to a Group and select which high level user can manage other users or group of users.



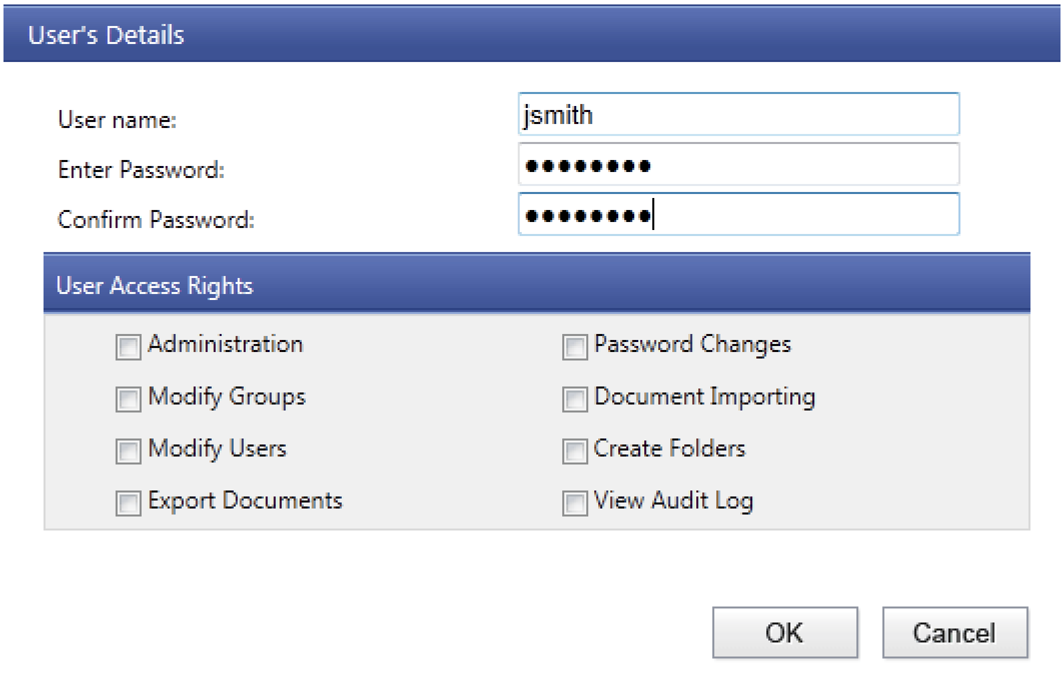
Adding a New User

To add a new user to FileNexus, select "User Administration" from the Configuration menu in the FileNexus Web Client.

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



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



User Access Rights - Overview

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

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

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

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

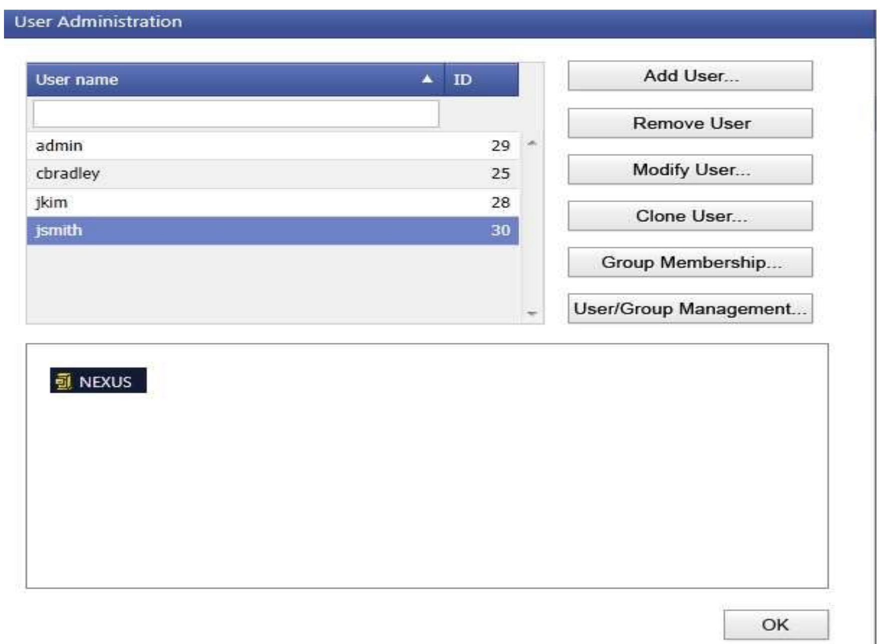
Password Changes
If this option is checked, the user will be able to change his/her password. This does not give the user rights to change anyone else's password.

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

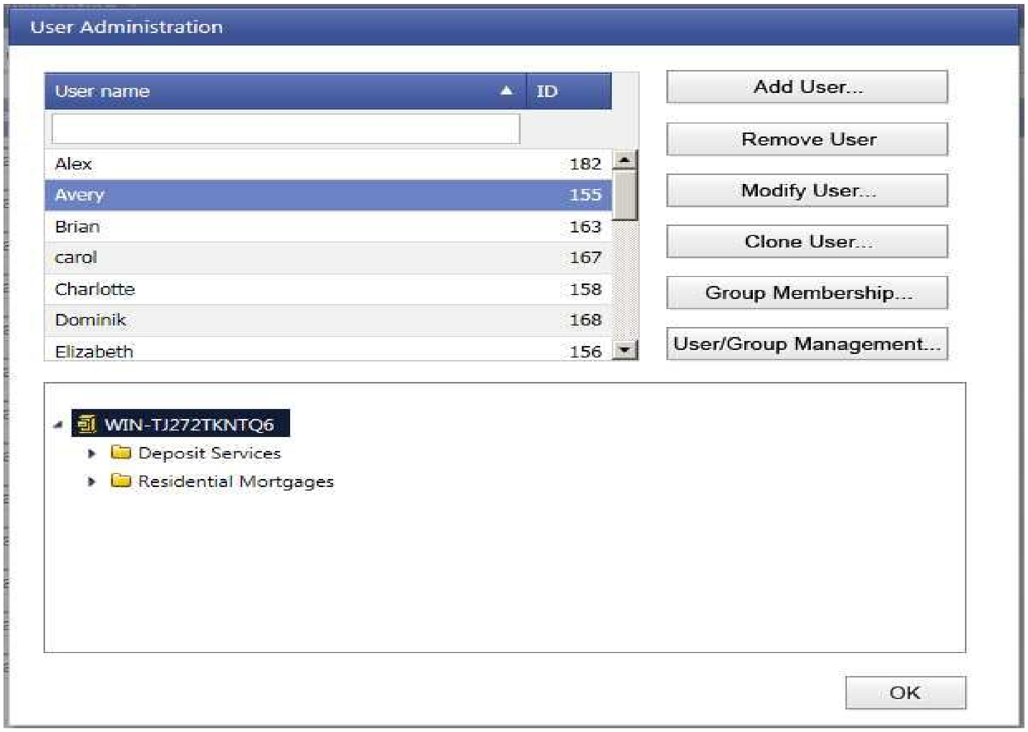
Create Folders
If this option is checked, the user will be able to create a new folder in the FileNexus Client by right clicking in the FileNexus Folder-tree area and selecting Create New Folder from the pop-up menu.

View Audit Logs
If this option is checked, the user will be able to view all audit logs produced in the FileNexus Web Client.

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



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



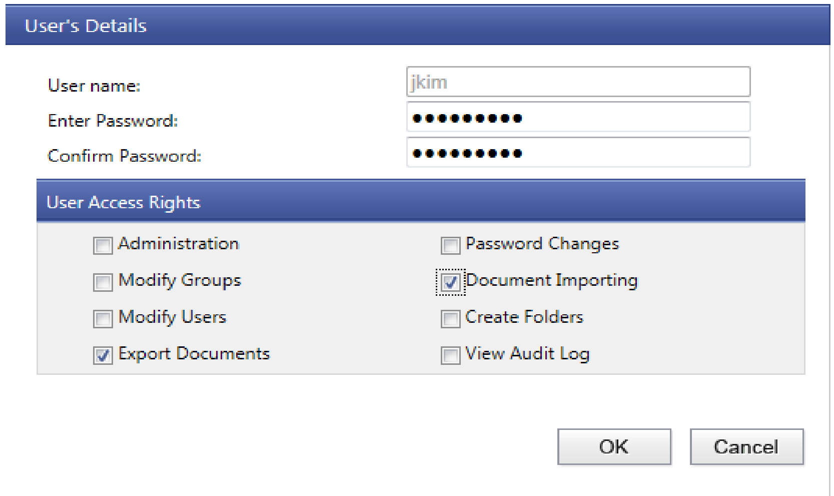
To expand the folder tree, click on the name of your FileNexus server (WIN-TJ272TNKTQ6 in the above example). A list of folders to which the user has access will appear. In the screen above, Brian has access to the Deposit Services and Residential Mortgages folders. If you see "+" sign next to a folder this indicates that it also has one or more sub folders. By clicking the "+" sign, you can further expand the folder tree to view the additional sub folders to which the highlighted user has viewing access.

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

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

Modifying a User
To modify a FileNexus user, highlight the user name and click on the Modify User button in the User Administration dialog. The User Properties dialog will open and allow you to change the user's User Access Rights. Simply click the appropriate checkbox to toggle on or off the desired User Access Right for the displayed user. Click the OK button to save your changes. If you make a

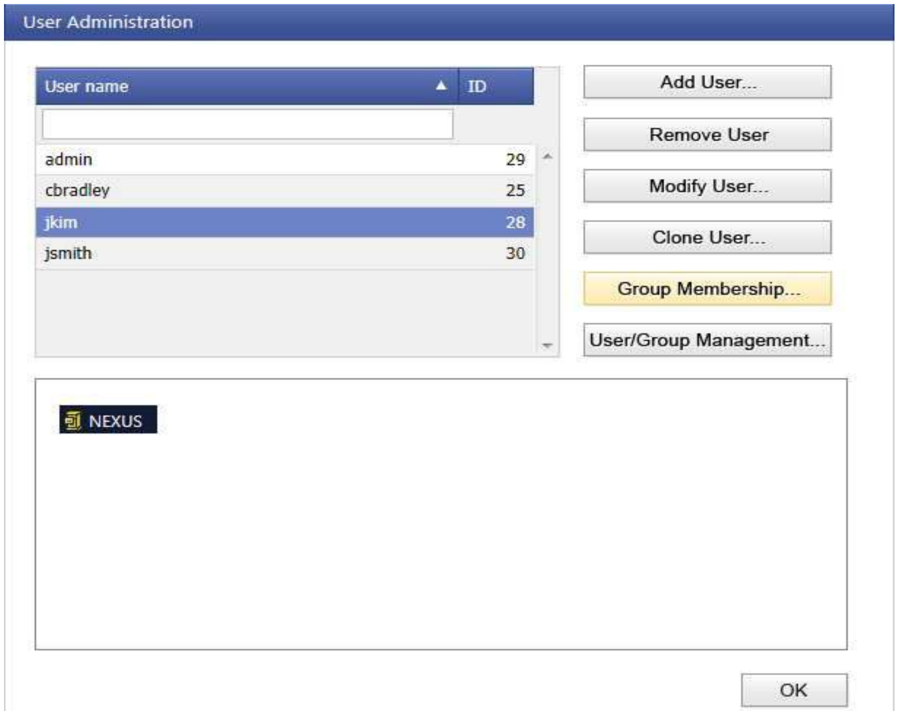
mistake in checking on/off an access right, click Cancel to exit the dialog. (For a description of User Access Rights in the User Properties dialog, refer to the previous section on Adding a New User)



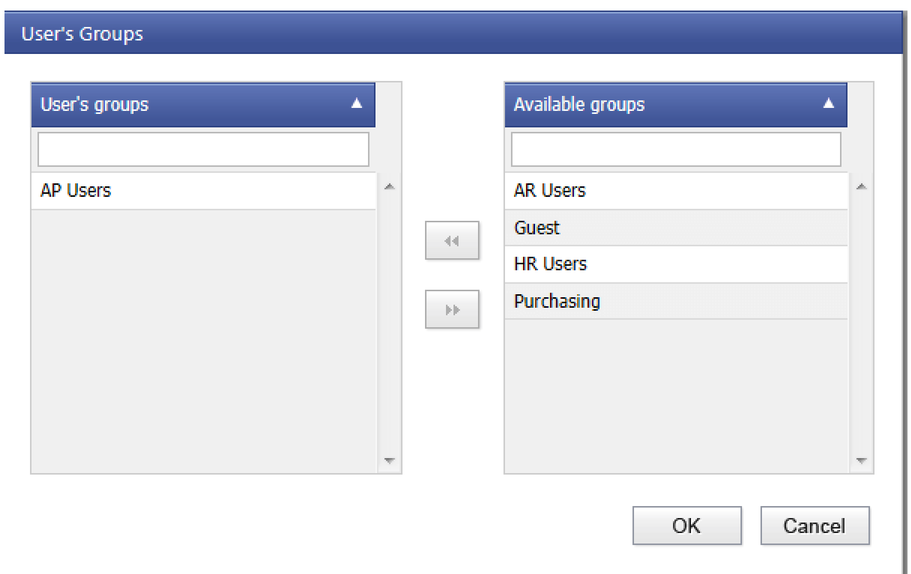
Cloning a User
If you need to create more than one user with the same User Access Rights and/or Group membership, click on the **Clone** button in the User Administration dialog. By cloning a user, you automatically create a new FileNexus user with the identical User Access Rights, Group Membership,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

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

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



This prompts The *Group Membership* window to be displayed.

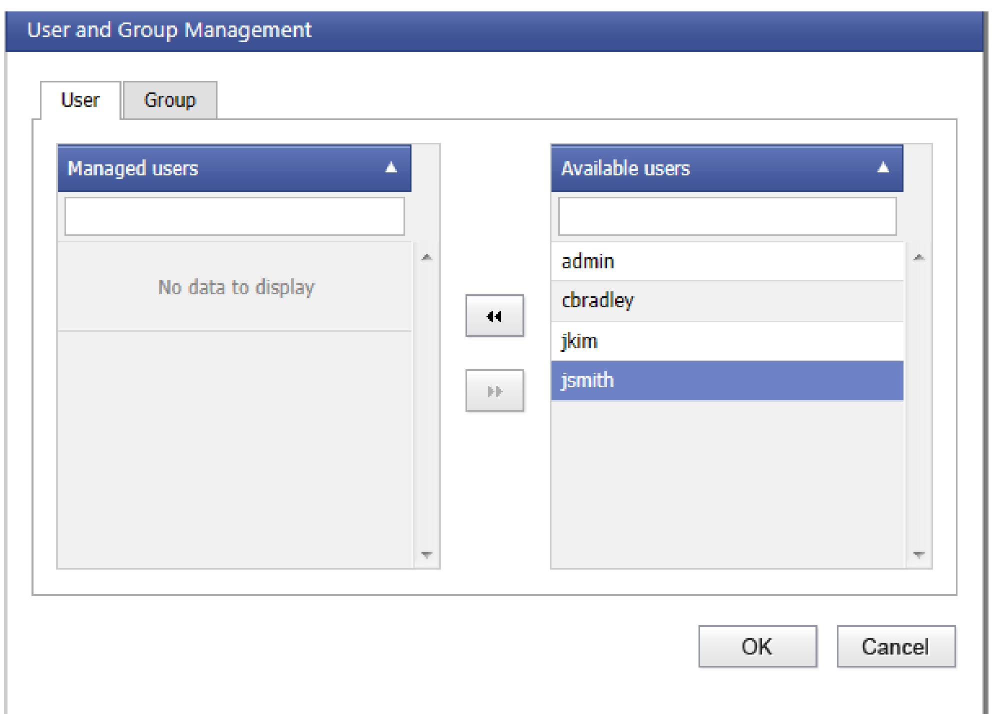


In the example above, a FileNexus administrator can select the FileNexus Group to which user jsmith should become a member. To select the group, highlight the group in the Group List, and then click on the left pointing arrow button. To remove the group membership for the selected user, highlight the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

For information on setting up FileNexus Groups and Group Administration, please refer to the section entitled Group Administration.

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

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

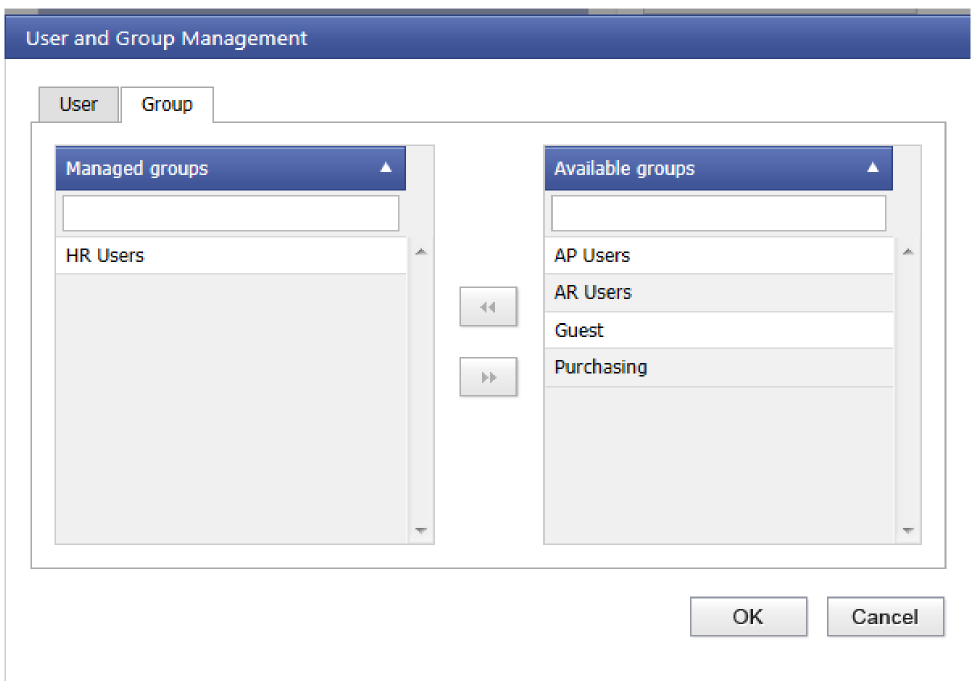


In the example above, a FileNexus administrator can select which FileNexus users will be managed. To add people to the list of users that an individual user can manage, highlight the user in the User List, and then click on the left pointing arrow button.

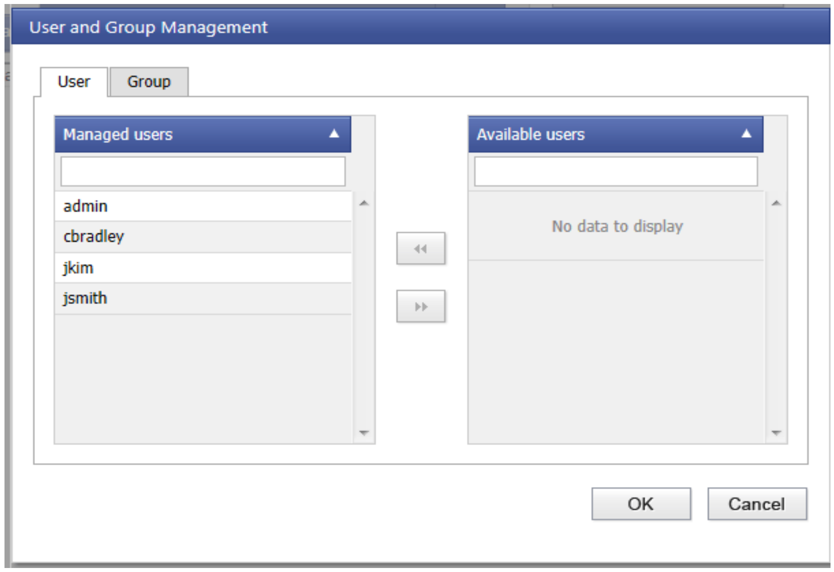
To remove people from the list of users that can be managed, highlight the user in the Managed by pane, and click on the right pointing arrow button. When you are finished, hit **Close**.

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

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



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



NOTES:

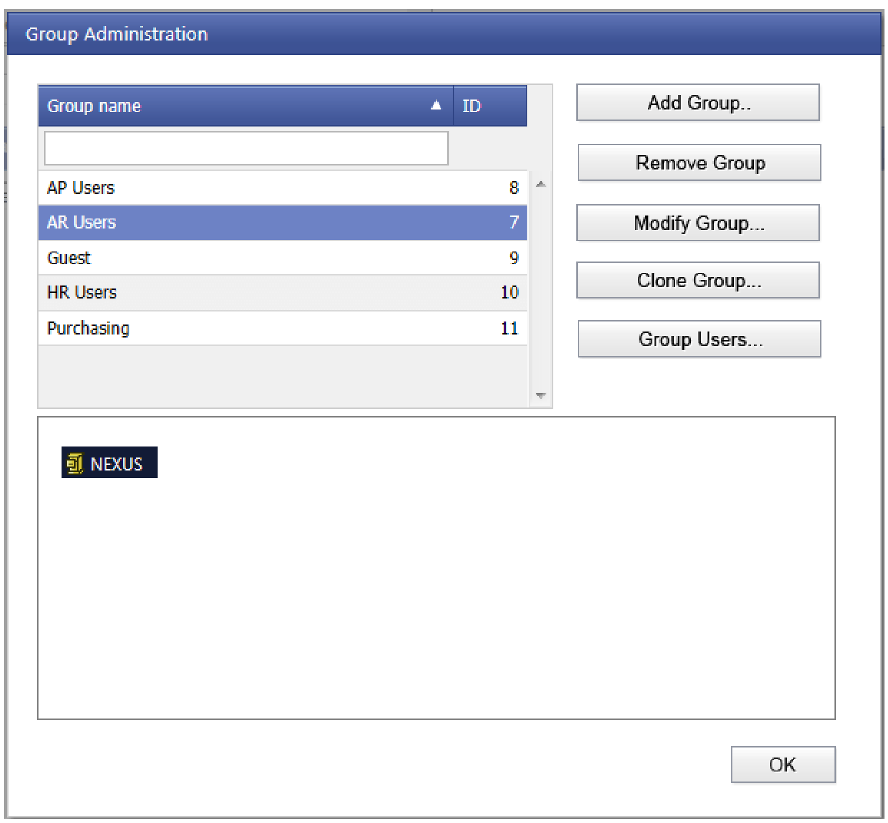
- A user does not have to be a member of a Group in order to manage it.
- More than one user can manage the same Group of users
- In order to manage a user (or group of users) as seen in the example above, the user Kim would need to have the "Modify Users" right. With this right, she will be able to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

Group Administration

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

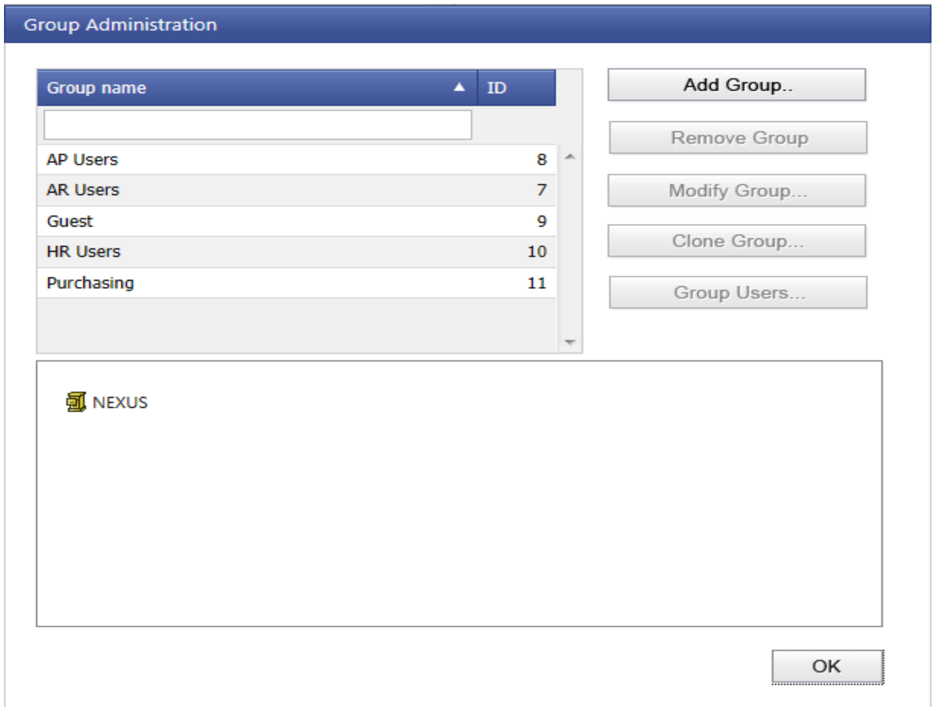
Group Administration Dialog

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

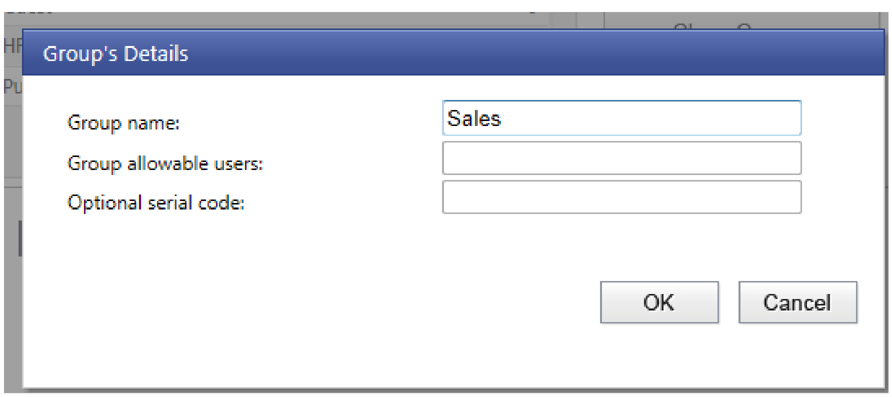


Creating a New Group

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



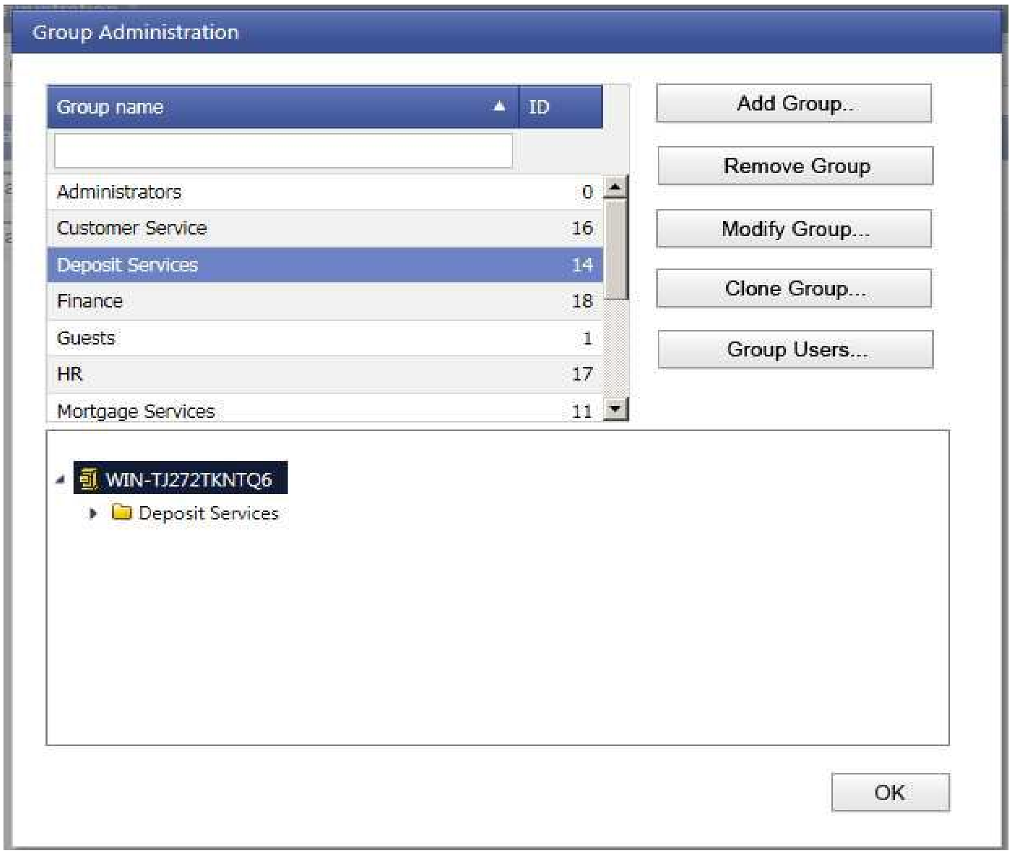
In the Groups dialog type in the name of the new group, and click the **OK** button.



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

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

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



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

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

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

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

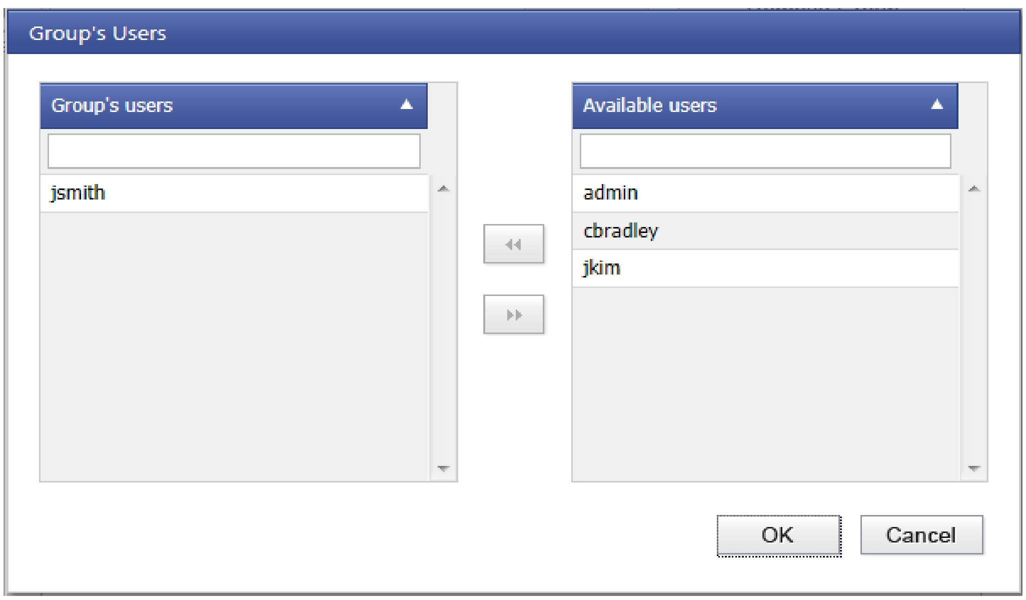
Adding Users to a Group

Group Membership

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

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

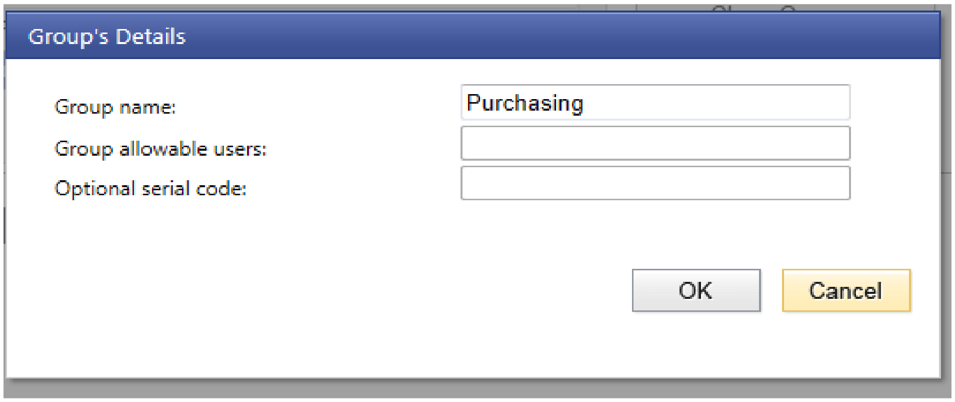
NOTE: If a user's individual security rights are different from the rights they have as a member of a group, the individual rights will override the group security rights.



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

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

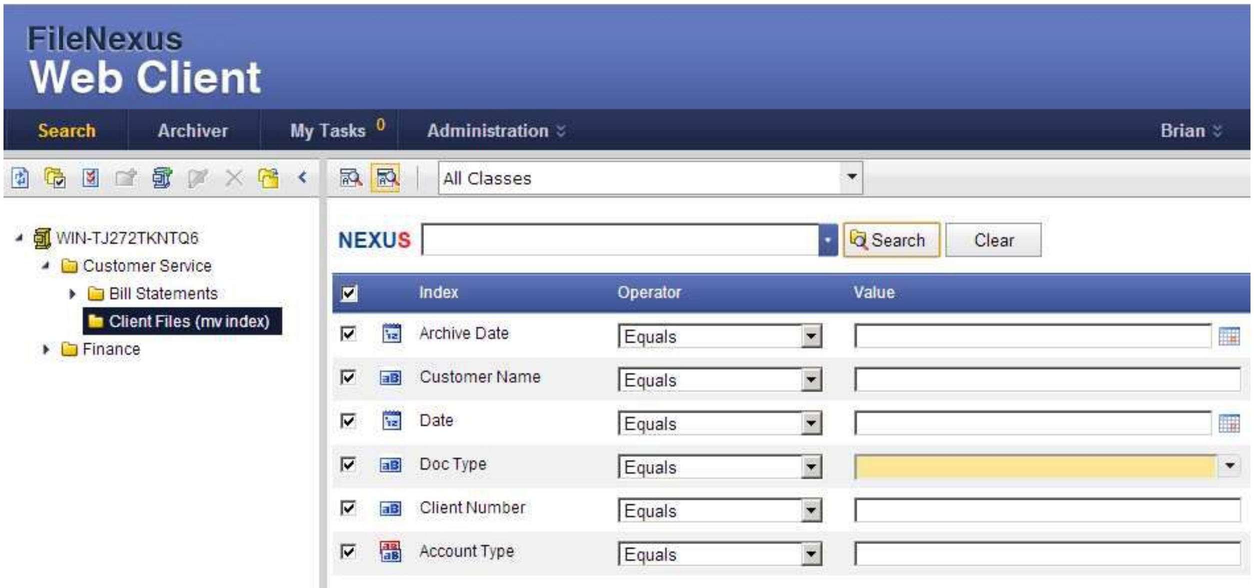
Modifying a Group
To modify the number of Concurrent User Licenses allocated to the group, highlight the desired group and click on the **Modify** Group button. Then in the Modify Group dialog, adjust the Group Allowable Users (Max N) as required and click the OK button to save your changes or the Cancel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



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

A Search Example

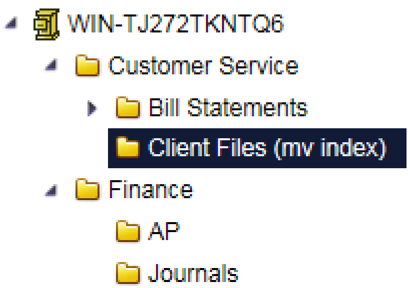
After logging into the Web Client, the user will be able to view the same folder-tree structure they would have access to if they logged into the Windows Client. In the below example, after the user Brian logs into the system, he can view and search for documents in the folders shown below.



To begin searching for documents, you must navigate to and click on the folder you wish to search on, or the parent folder for the sub-folders you wish to search within. By default, you will be shown the simple **Index Search Pane**, as in the above example.

Searching on a Single Folder

To search on a single folder for documents archived to FileNexus, highlight or click on the desired folder. In our example, Brian will click on the *Client Files* folder. Notice that the name of the folder that is clicked on appears highlighted.



Once the user has clicked on a single folder, the index search pane will appear.

The Index Search Pane

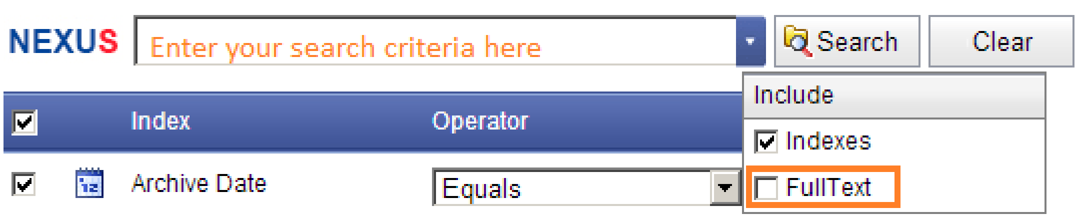
To the right of the folder tree, an index search pane will appear allowing the user to enter any search criteria in the edit boxes provided before recalling matching document search results.

An example of a typical *Index Search* pane

In the above example, the user is searching for "CREDIT APPLICATION" documents in the selected folder. They would simply click the Search button to conduct the search and pull back the matching document results.

The NEXUS Search

The NEXUS search box provided allows you to enter search criteria that may exist in any applicable index value OR in the content of a full-text indexed document.



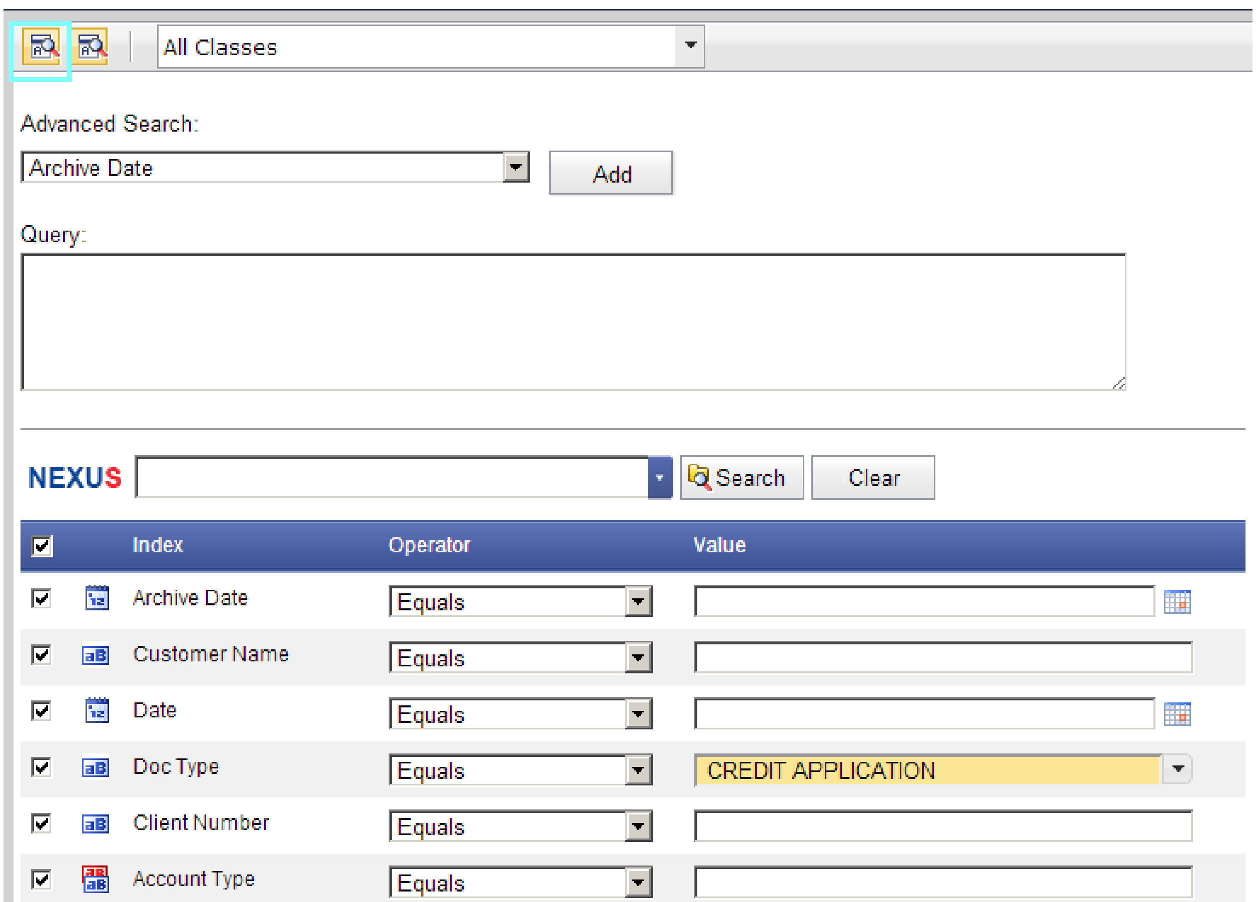
For example, by entering a string, only Text data type indexes will be searched along with the content of full-text indexed documents. If you enter a numeric value or date, all index values will be searched along with the content of full-text indexed documents.

NOTE: By using the NEXUS Search, you can combine its capabilities along with any additional search criteria you may enter for specific indexes. Entered search values in the index value boxes **and** the NEXUS Search box must be true when recalling search results.

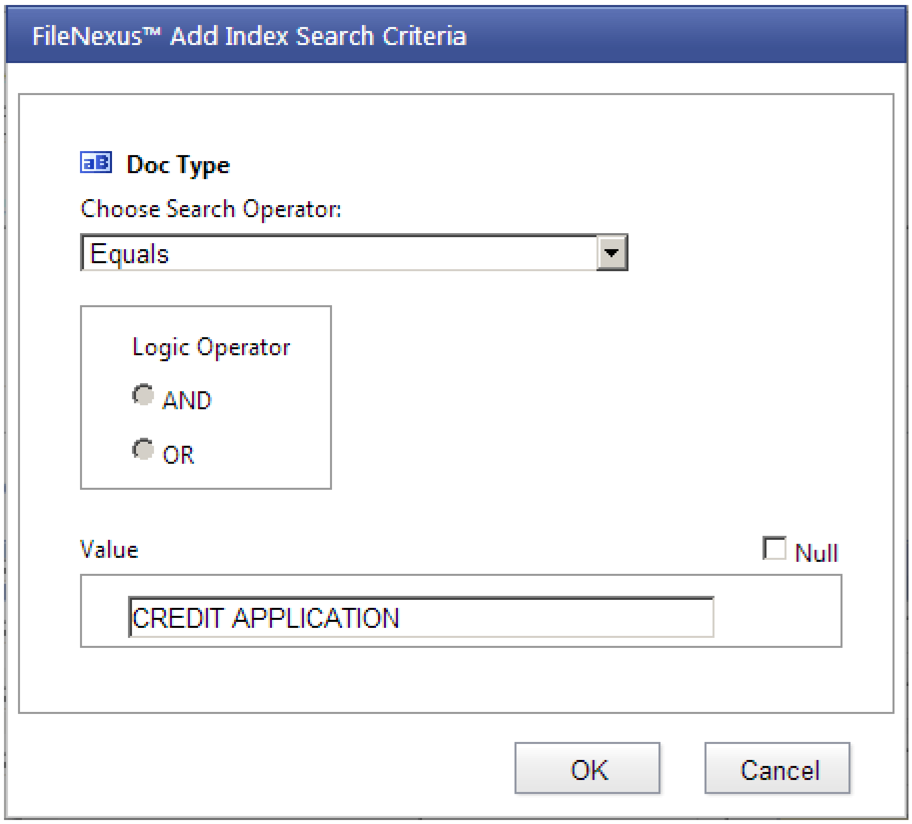
Advanced Searching

Most users most of the time will use the default searching in FileNexus, where they click on a folder and see a search pane similar to the ones in the previous examples. However, if you need to conduct a more "Advanced" search where you need one or more search criteria to be true OR another set of search criteria to be true, you may want to use the FileNexus Advanced Search feature.

To enable the Advance Search pane, highlight the folder you wish to search across and click the Advanced Search icon. Your search screen with then appear similar to the one below. You can toggle on and off the Advanced Search pane by clicking the same icon.

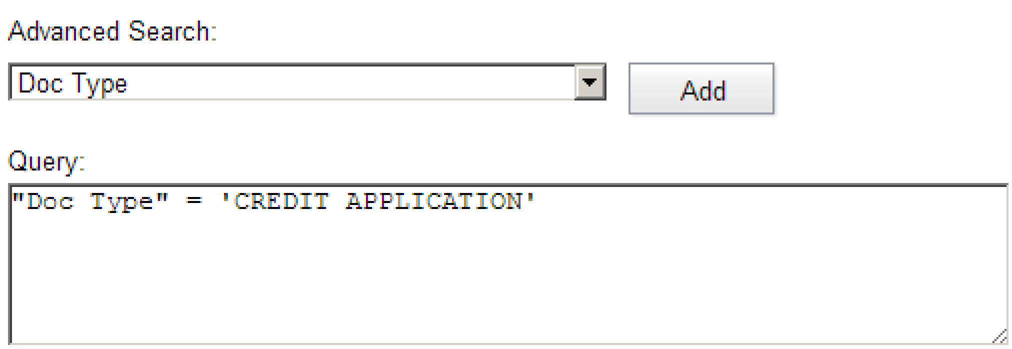


To create your advanced search query, select the first index for which you wish to add search criteria from the dropdown provided and click Add. This will launch another window in which you can enter the search value.

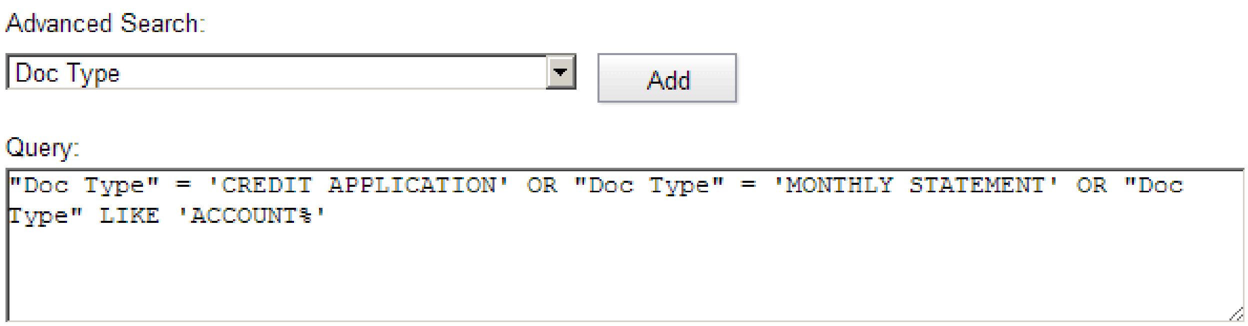


In the new window, choose the Search Operator and then enter the value in the edit box provided before hitting OK.

Your query may look something like this …



To continue building your query, keep selecting the appropriate indexes from the dropdown provided and hit **Add**. Then choose the Search Operators, Logic Operators, and enter values as appropriate each time hitting OK.



As your query grows, you can review it in the Advanced Search pane and hit Search when you're ready.

Any additional search criteria entered in the normal index search pane will also be applied when you hit Search.

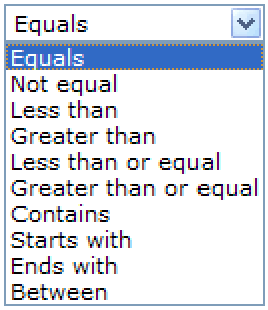
The Index Data Types

Each icon immediately to the left of an Index name indicates the index's data type, and therefore is a good indication to you of what sort of information to enter in the *Value* column for search criteria.

Icon	Data Type	What to Enter
	Datetime	You can enter the date (mm/dd/yyyy) the date and the time (mm/dd/yyyy 12:00:00 AM) or select the date from a pop up calendar by double-clicking in the value edit box for an Index of a *datetime* data type
	Text/String	Enter any alpha or numeric string
	Text/String (Multi-value)	Enter any alpha or numeric string (which will be compared to each of the values in the Multi-value index)
	Numeric	Enter whole numbers only (0, 1, 2, …, 999, …)
	Currency	Enter a valid dollar amount with or without a decimal (100, 100.99, 1,000.00)
	Date	Enter a valid date format (mm/dd/yyyy or dd/mm/yyyy or mm-dd-yyyy or other common date formats) or select the date from a pop up calendar by double-clicking in the value edit box for an Index of a *date* data type

Index
This column contains the name of the indexes that exist on the documents within the folder.

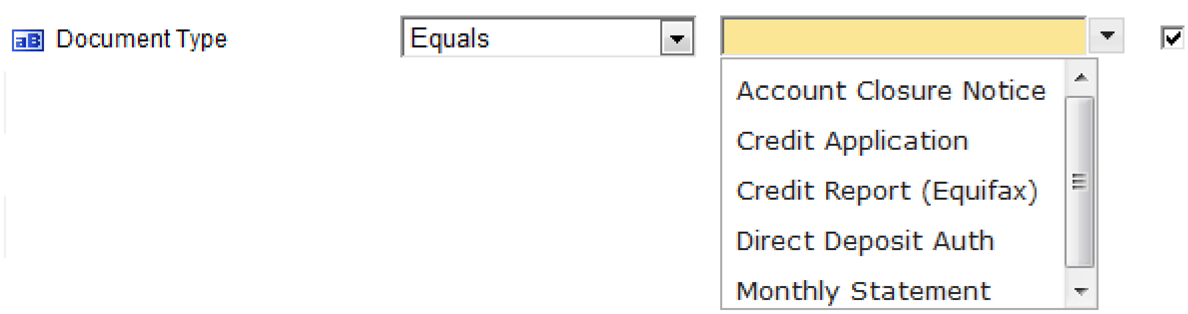
Operator
A drop-down containing the comparison operators available when filtering search results by an entered or selected index value.



If choosing "Between" as your comparison operator, you will need to enter two values as in the example below. All other operators require only one search value.

Value
The value to compare against when filtering search results whether it is a string, date, numeric, currency, or other data.

Advanced Pick-lists
Some indexes will be set up to allow for pick-list searching. If an index has a pre-populated pick-list associated with it, indicated by a highlighted drop-down box, the user does not need to enter search criteria for the index, but simply choose the value from the drop-down provided as in the following example. Alternately, the user can auto-filter the pick-list items by keying in a word or characters in the highlighted drop-down.



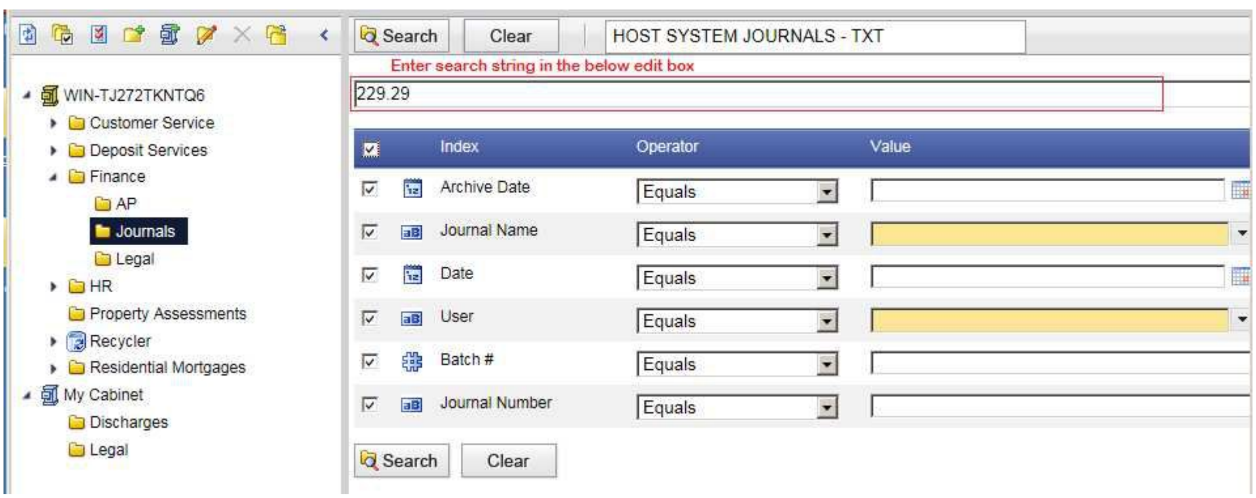
Display Checkboxes
Clicking on the checkbox to the left of the "Index" heading will toggle on/off all indexes for display in the search results. A user can also check on/off individual indexes for display in search results.

Search
Clicking on this button will prompt FileNexus to use the entered search criteria and retrieve any matching document search results.
NOTE: At least one index must be checked on for display or you will not receive any search results.

Clear
Clicking on this button will reset all the values to blank and all of the Operators back to “Equals”. This is handy if you want to conduct a new/different search on the same folder as your previous search.

In a very basic search, you may select an operator, enter a value, and click Search.

Full Text Searching
If your documents are full-text indexed (meaning that they are set up for content searching), an additional edit box may appear above the indexes so that you may enter a character string you wish to search within the content of archived documents. Possible document types that can be full-text indexed include Word, .TXT files, Excel Spreadsheets, PDFs with text data, etc.
In the example below, the user is searching the *Journals* folder for any document containing the text *229.29*.

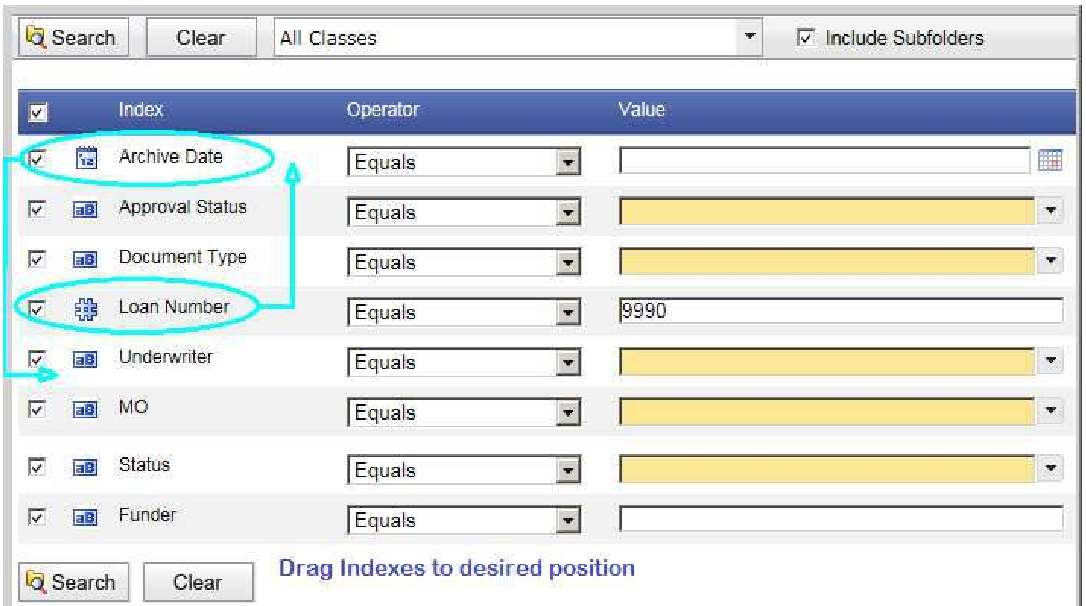


Customizing the Search Pane

The enhanced Web Client allows users to customize the search pane for their various documents and have the customizations persist based on the user's unique FileNexus login.

Customizing the Index Order

To customize the order of your search indexes for a given folder, simply drag and drop indexes to the desired position (either higher or lower in the index list).

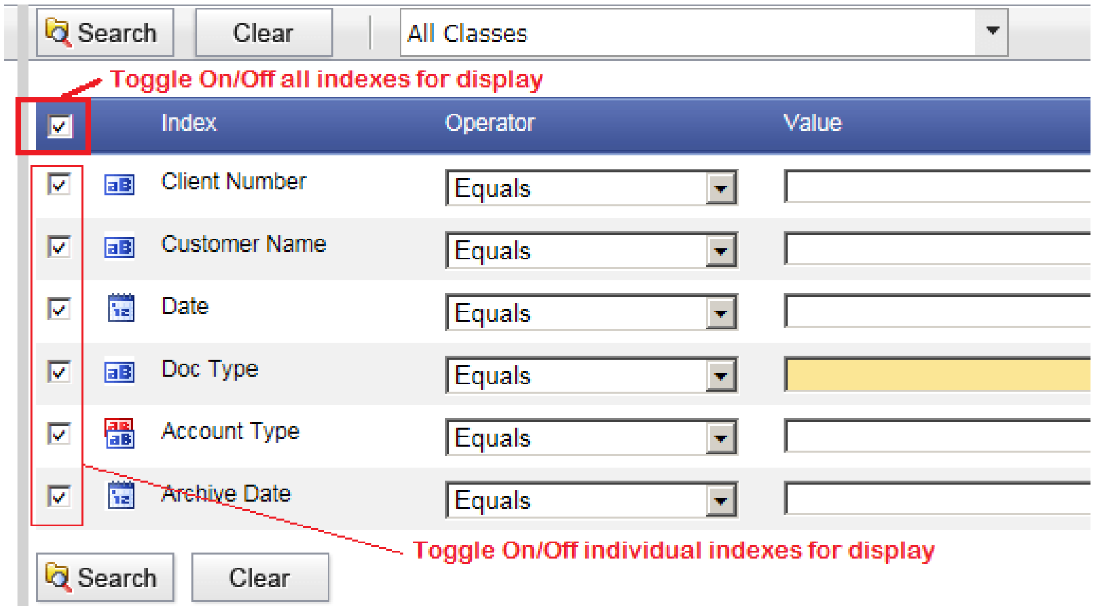


In the above example, when you conduct a search (by clicking the **Search** button) after reordering the indexes, the settings will persist for "All Classes".

If you conduct a search on a specific Document Class within the folder by selecting it from the Class drop-down box, you will need to reorder your indexes for that class and hit the Search button to have your settings persist.

Customizing the Indexes to Display

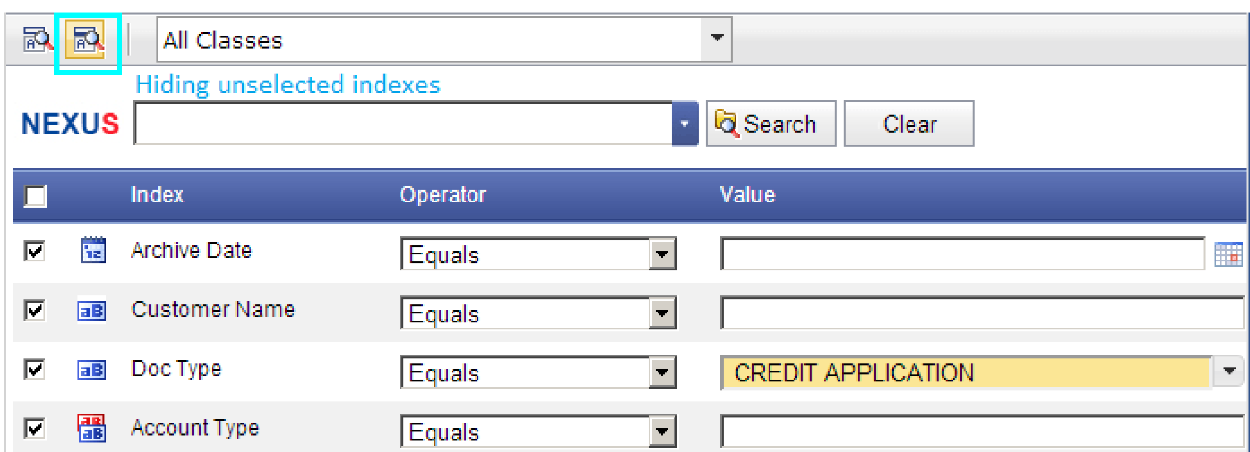
To customize the indexes you wish displayed in your search results, simply check on or off the indexes in the Display column. Persistence for the index display will work the same as persistence for your index order.



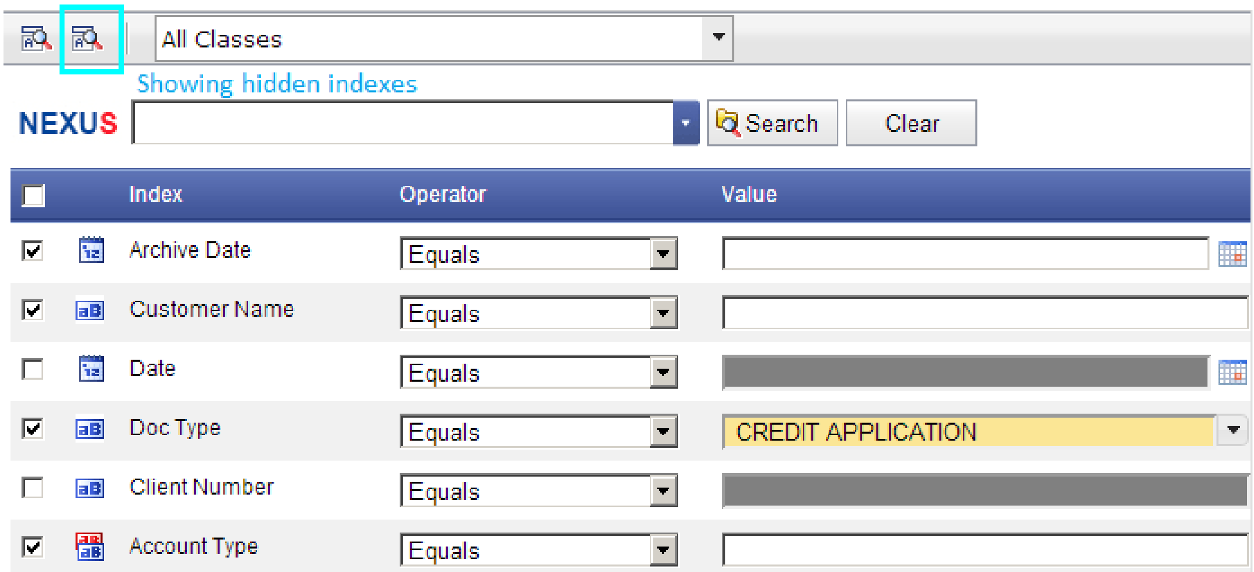
Hiding and Showing Search Indexes

By default, the index search pane will be set to ***Hide unselected indexes***. What this means is that if certain indexes do NOT have a display checkmark turned ON for the search results, the index will also not show on the index search pane. Users can change this setting to Show hidden indexes by toggling off the open by clicking the icon.

In the below image, unselected indexes are being hidden from view, the icon is turned ON.



In this image, hidden indexes are being shown to the user (he/she may want to change their display preferences), the icon is turned OFF.

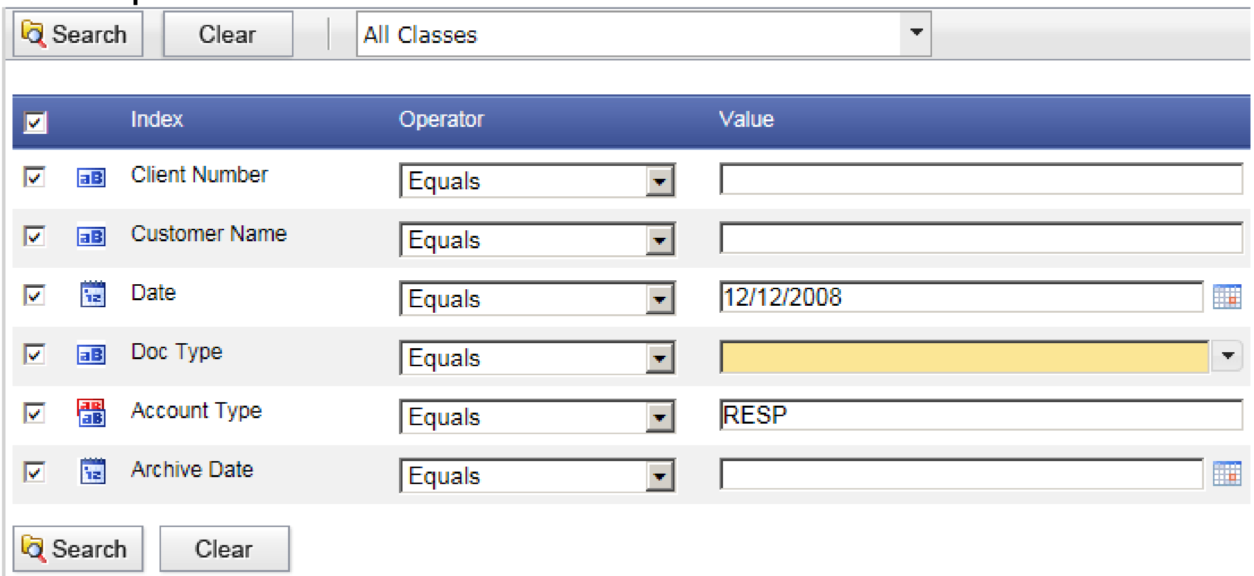


Conducting a Search

To conduct a search, follow these simple steps:

1. Choose the comparison operator from the provided drop down for the index you wish to filter your results by.
2. Enter or select the value in the *Value* edit box for the index you wish to filter your results by.
3. Ensure that you have checked on at least one index for display under the “Display” column or check the box beside the Display heading to turn on or off all indexes for display.
4. Repeat steps 1 – 3 for any additional index values you wish to employ to filter your search results.
5. If the documents you are searching for are full-text indexed (i.e. the *Full Text* edit box appears in your *Index Search* pane), you may choose to skip steps 1 and 2 and simply enter a string to search for in the *Full Text* edit box. You can also choose to combine full-text searching with entered index search criteria.
6. When you have completed entering you search criteria, click the *Search* button.
7. View, open, and manage the documents in the resulting *Search Results Grid*.

An example search to be conducted

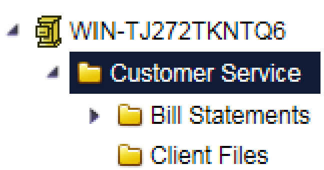


Sub-folder Searches

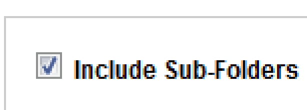
When conducting a sub-folder search, search options are only slightly different.

To begin a sub-folder search, highlight or click on the parent folder in the folder-tree. This folder should have an arrow icon sign next to it indicating that it has one or more sub-folders.

In this example, our logged in user Kim will click on the Customer Service folder so she can include the sub-folders *Bill Statements* and *Client Files* in her search.



In the Index Search pane that appears, the user will have the option to include or exclude the subfolders in the subsequent search by clicking on or off the *Include Sub-folders* checkbox.



NOTE: The highlighted folder in the folder tree will always be included in the search for documents, even if Include Sub-folders is checked off.

After confirming whether to include subfolders or not in a search, Kim can proceed with her search as described in the previous section.

To review, the steps involved in conducting a sub-folder search are:

1. Highlight a parent folder (any folder with sub-folders) in the folder tree
2. Confirm whether sub-folders should be included in the search or not by checking on/off the *Include Sub-Folders* checkbox.
3. On the *Index Search* pane follow the steps from the previous section, “The Index Search Pane”, which are reiterated below for your convenience.

From the section “The Index Search Pane”
To conduct a search, follow these simple steps:

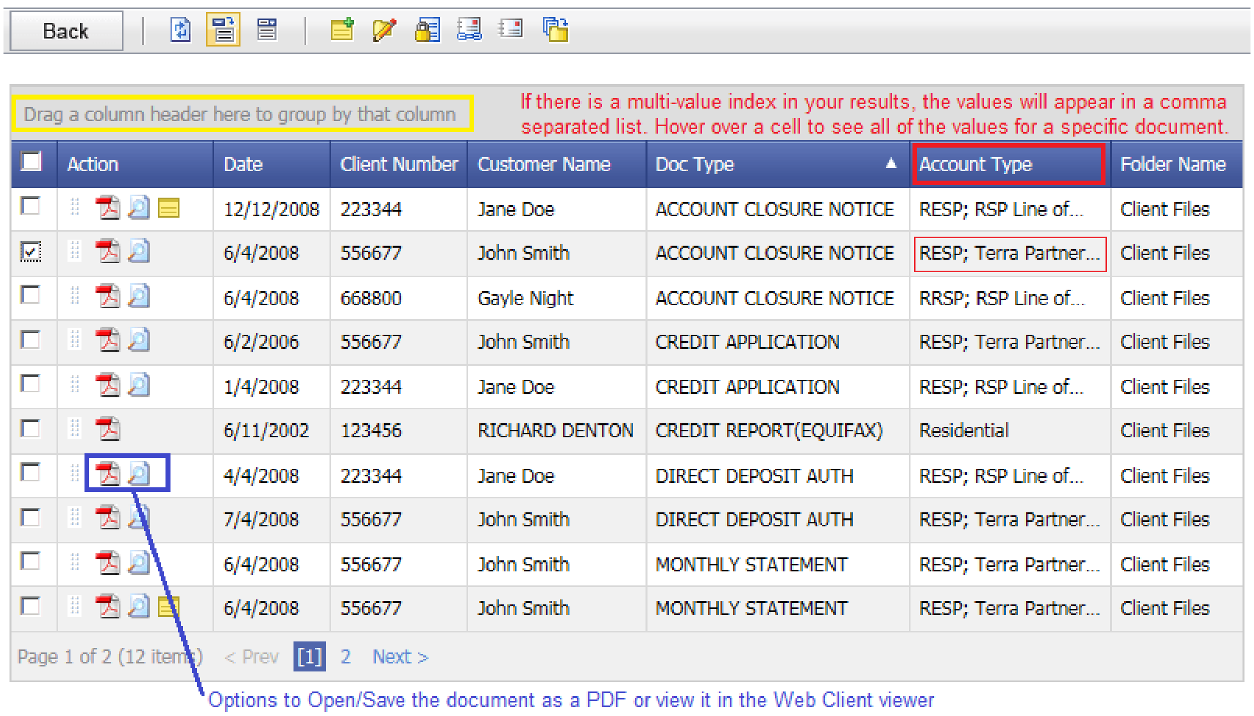
1. Choose the comparison operator from the provided drop down for the index you wish to filter your results by.
2. Enter or select the value in the *Value* edit box for the index you wish to filter your results by.
3. Ensure that you have checked on at least one index for display under the “Display” column or check on the checkbox next to the Display header to select all indexes for display.
4. Repeat steps 1 – 3 for any additional index values you wish to employ to filter your search results.
5. If the documents you are searching for are full-text indexed (i.e. the *Full Text* edit box appears in your *Index Search* pane), you may choose to skip steps 1 and 2 and simply enter a string to search for in the *Full Text* edit box. You can also choose to combine full-text searching with entered index search criteria.
6. When you have completed entering you search criteria, click the *Search* button. View, open, and manage the documents in the resulting *Search Results Grid*.

Search Results

Once a search has been conducted on a single folder or on a parent folder and its sub-folders, the user can view their search results in a dynamic *Search Results Grid*. Document search results in the Web Client are presented to the user in a similar manner to the FileNexus Client.

Dynamic Search Results Grid

In the Web Client, if there are any search results to return, they will appear in a dynamic search results grid, as in the below example. This “dynamic” grid allows the user to manage their search results by providing the ability to group results by one or more indexes, reorder and resize index columns for ease of viewing, as well as open, save, and view documents.



	Action	Date	Client Number	Customer Name	Doc Type	Account Type	Folder Name
		12/12/2008	223344	Jane Doe	ACCOUNT CLOSURE NOTICE	RESP; RSP Line of...	Client Files
		6/4/2008	556677	John Smith	ACCOUNT CLOSURE NOTICE	RESP; Terra Partner...	Client Files
		6/4/2008	668800	Gayle Night	ACCOUNT CLOSURE NOTICE	RRSP; RSP Line of...	Client Files
		6/2/2006	556677	John Smith	CREDIT APPLICATION	RESP; Terra Partner...	Client Files
		1/4/2008	223344	Jane Doe	CREDIT APPLICATION	RESP; RSP Line of...	Client Files
		6/11/2002	123456	RICHARD DENTON	CREDIT REPORT(EQUIFAX)	Residential	Client Files
		4/4/2008	223344	Jane Doe	DIRECT DEPOSIT AUTH	RESP; RSP Line of...	Client Files
		7/4/2008	556677	John Smith	DIRECT DEPOSIT AUTH	RESP; Terra Partner...	Client Files
		6/4/2008	556677	John Smith	MONTHLY STATEMENT	RESP; Terra Partner...	Client Files
		6/4/2008	556677	John Smith	MONTHLY STATEMENT	RESP; Terra Partner...	Client Files

Action column

The Action column from the document search results page, displays the actions that are available with regards to the document.

Click on the icon to save or open an archived PDF document, or an archived Text or Tiff document that will convert to PDF on the fly.

Click on the icon to view a Tiff or Text document in the embedded viewer. For detailed explanation about the embedded viewer, please refer to the ‘Embedded Viewer’ section.

Other document types will display their native application's icon in the Action column allowing the user to open or save the document.

NOTE: Many PC files like Word, Excel, Visio, AutoCad, and others will not be viewable in the embedded Web Client viewer but will automatically invoke their native application's viewer when the document's icon is clicked in the Action column.

Click on the icon in order to view notes that may be associated with a document.

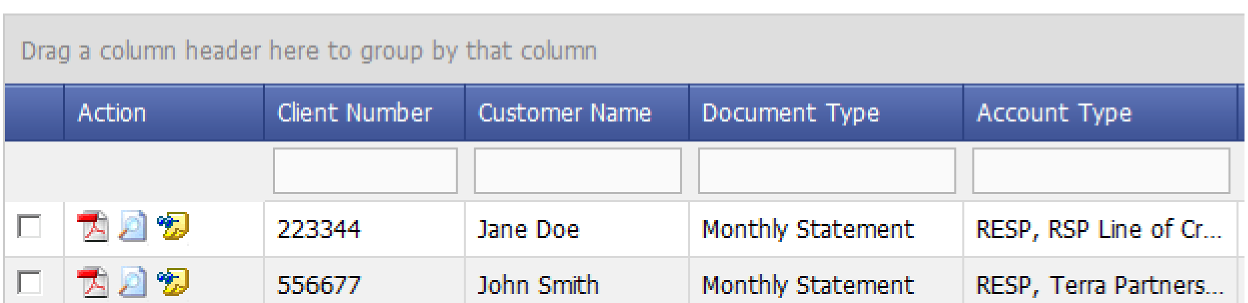
Document Status Bar

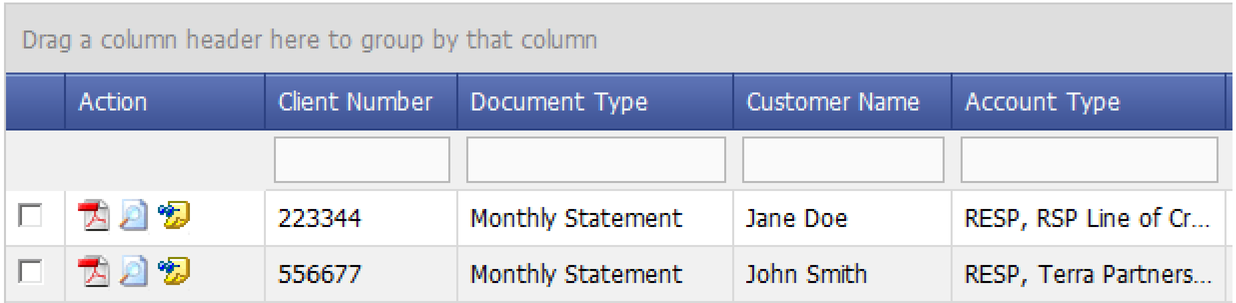
The status bar at the bottom of the grid will display how many results were returned from the search, and how many grid pages there are containing the total results. For example, in the below image, we can see a total of 23 documents were returned from the search, and they span 2 pages (Page 1 of 2). This is because the maximum number of documents per page is set to 20. The current page of results being viewed will appear in bold and square brackets []. You may click on the blue page numbers to move between pages or use the provided navigation arrows for Prev and Next.

Search Results Grid Features

Reorder Index Columns

To reorder your index columns, simply click on and drag the column header to the desired location in the header row. In the below example you can see that "Document Type" starts in between the "Customer Name" and "Account Type" columns and is then moved to the right of "Client Number".

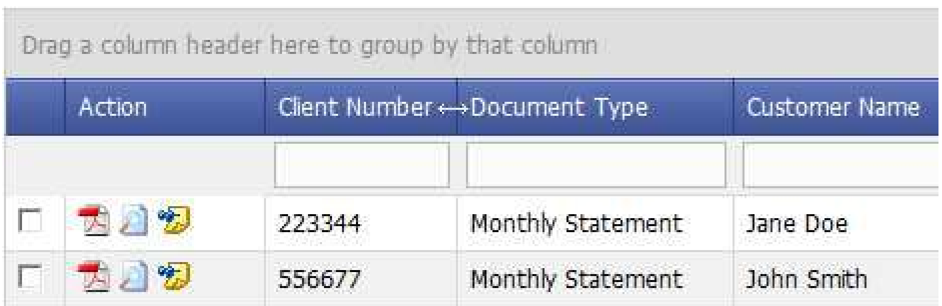




NOTE: Reordering index columns will persist for subsequent searches on the same folder/document class based on your unique FileNexus login.

Resize Index Columns

To resize the width of your index columns, simply hover your mouse over the grid lines between column headers until the double-sided white arrow appears. You can then click and drag the grid's vertical line marker to the left or right to resize as necessary.

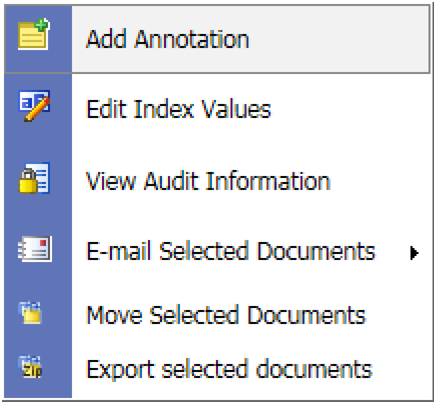


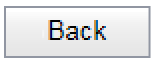
NOTE: Resizing index columns will not persist for subsequent searches on the same folder/document class. The modified column widths will only stay in effect for the current search results session.

Search Results Toolbar

There a number of options to manage your document search results through the Search Results Toolbar as seen below.

Many (but not all) of the same options are also available by right-clicking on a document to view the right-click menu.

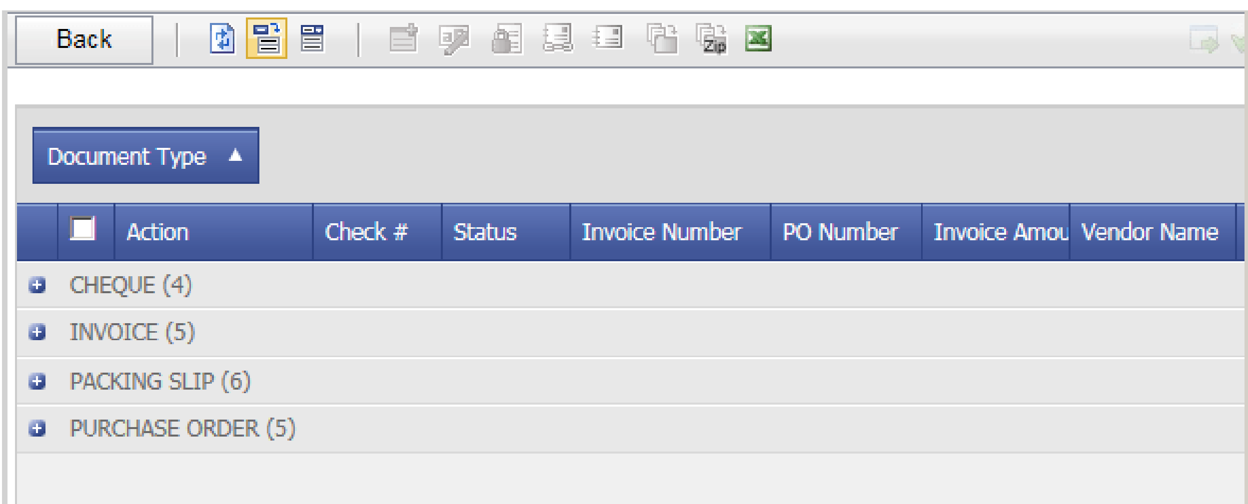


Back 

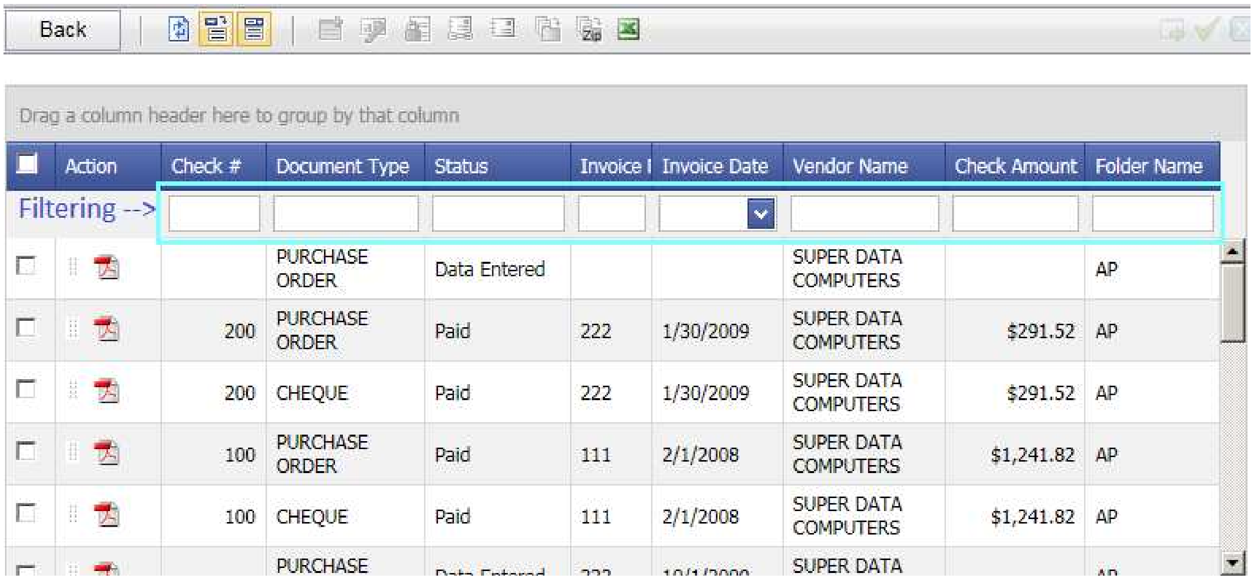
Click the *Back* button to return to the *Index Search* pane where your most recent search criteria will still persist for the same folder(s) being searched.

Refresh 
Click the *Refresh* button to refresh the search results being displayed.

Enable/Disable Grouping 
When this option is enabled, you can use the “Group By” feature to better organize your search results. To do this, click and drag the index column heading you wish to group your results by, into the grey area below the search results toolbar. You can group by more than one index by dragging additional column headings to the grey area.
In this example, search results are grouped by the ‘Document Type’ index.



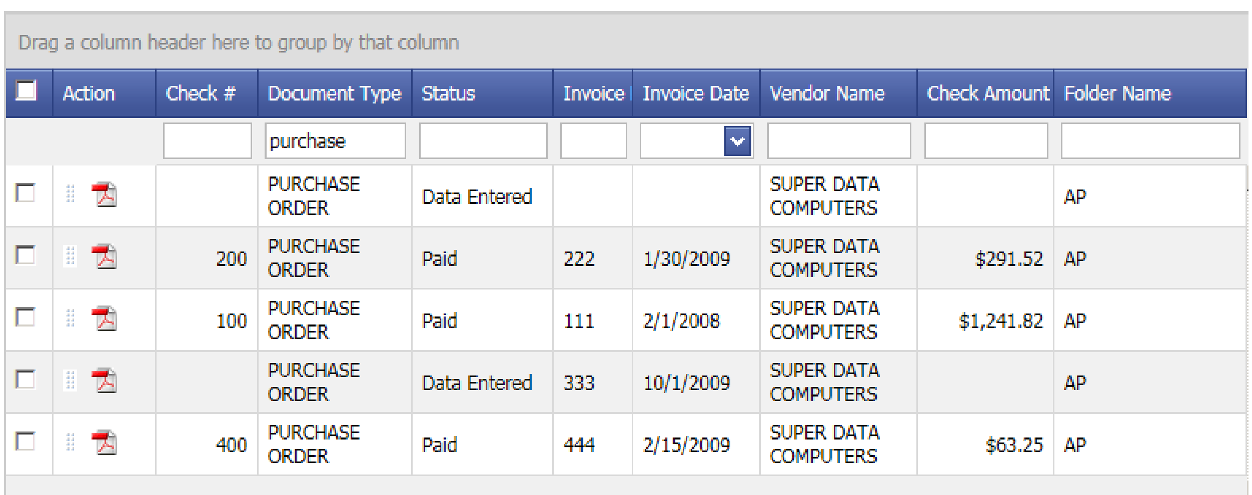
Enable/Disable Filtering 
Enabling this feature allows users to filter search results by displaying filter edit boxes above index values.



	Action	Check #	Document Type	Status	Invoice I	Invoice Date	Vendor Name	Check Amount	Folder Name
			PURCHASE ORDER	Data Entered			SUPER DATA COMPUTERS		AP
		200	PURCHASE ORDER	Paid	222	1/30/2009	SUPER DATA COMPUTERS	$291.52	AP
		200	CHEQUE	Paid	222	1/30/2009	SUPER DATA COMPUTERS	$291.52	AP
		100	PURCHASE ORDER	Paid	111	2/1/2008	SUPER DATA COMPUTERS	$1,241.82	AP
		100	CHEQUE	Paid	111	2/1/2008	SUPER DATA COMPUTERS	$1,241.82	AP
			PURCHASE				SUPER DATA		

To filter search results, enter all or a portion of the index value you wish to filter by in the provided edit box(s). The results will filter automatically as the user enters a value.

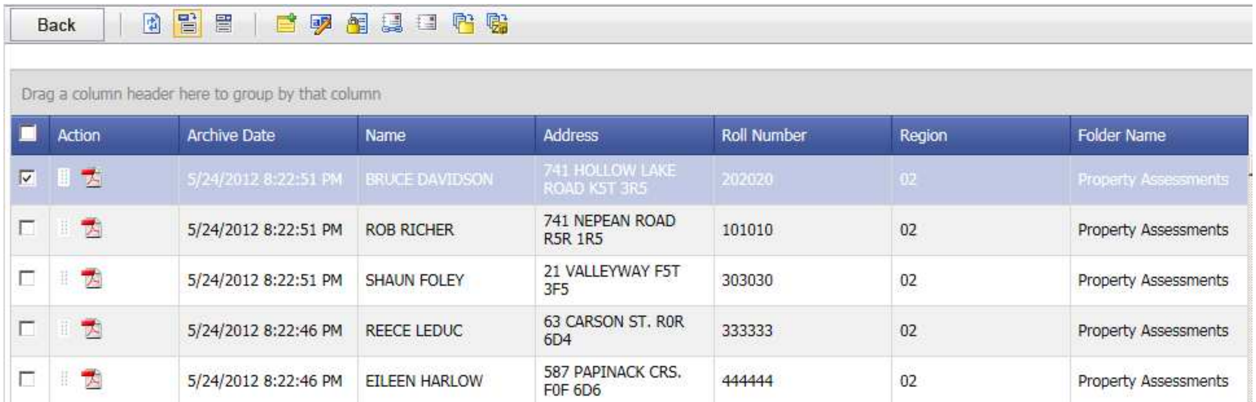
In the following example, the user is trying to narrow down the search results to include only Purchase Orders by keying in ‘purchase’ in the Document Type index filter box provided.



	Action	Check #	Document Type	Status	Invoice	Invoice Date	Vendor Name	Check Amount	Folder Name
			PURCHASE ORDER	Data Entered			SUPER DATA COMPUTERS		AP
		200	PURCHASE ORDER	Paid	222	1/30/2009	SUPER DATA COMPUTERS	$291.52	AP
		100	PURCHASE ORDER	Paid	111	2/1/2008	SUPER DATA COMPUTERS	$1,241.82	AP
			PURCHASE ORDER	Data Entered	333	10/1/2009	SUPER DATA COMPUTERS		AP
		400	PURCHASE ORDER	Paid	444	2/15/2009	SUPER DATA COMPUTERS	$63.25	AP

Add Annotation 

This feature can be used either by right clicking on a document or selecting the document and clicking the annotation icon from the search results toolbar.



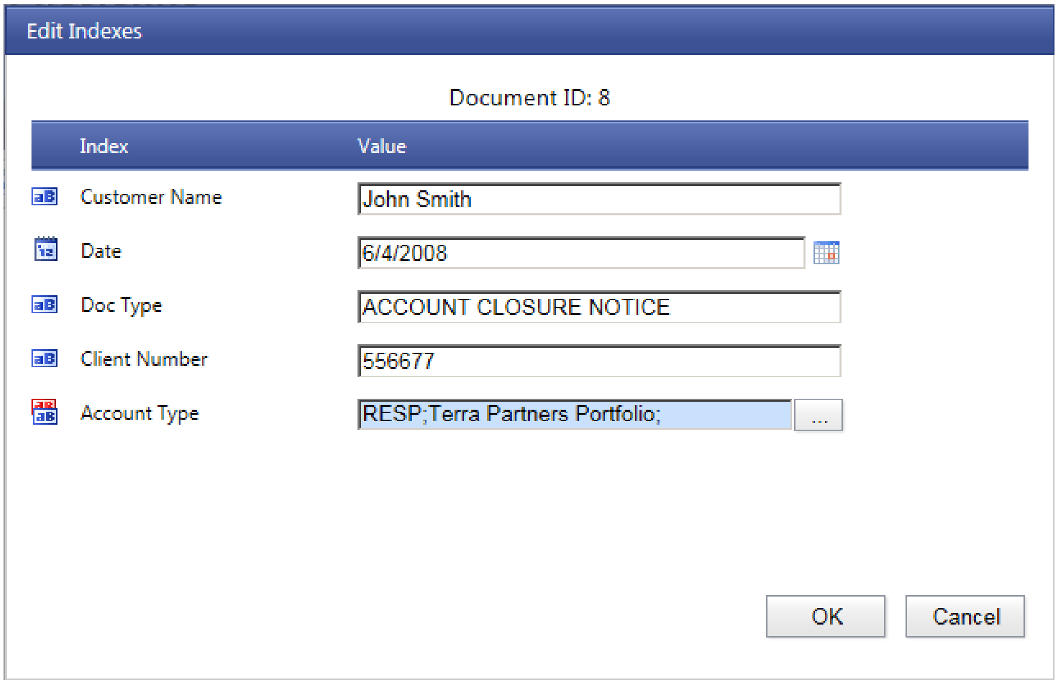
To add a note or annotation to one or more selected documents, click on the Add Annotation icon. This will launch an *Add Annotation* text window.

After you enter your note, click OK to save or Cancel to cancel the note. When adding an annotation, FileNexus will automatically stamp the username and system date and time on the note.

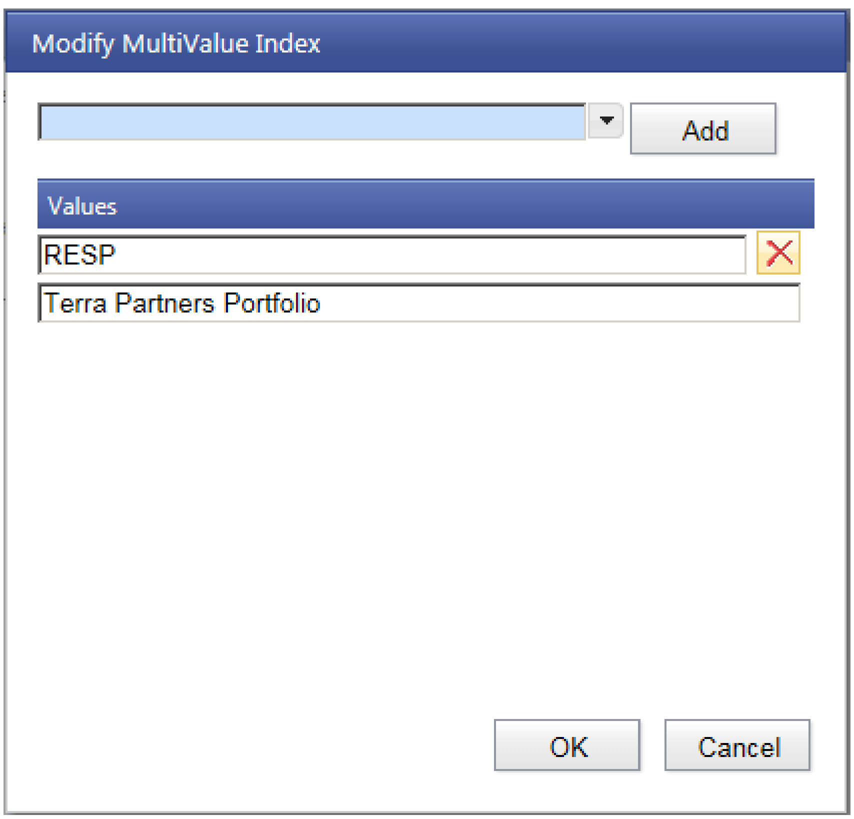
Edit Index Values 

This feature can be used either by right clicking on a document or selecting the document, and clicking the Edit Index Values icon.

When the Edit Indexes window appears, simply key in or correct the value you wish to update in the edit boxes provided or select the value from in input pick-list, and hit OK to save your changes or Cancel to discard your changes.



If you are editing a Multi-value index, click on the ellipses icon to open a Modify MultiValue Index window, like the one shown below.



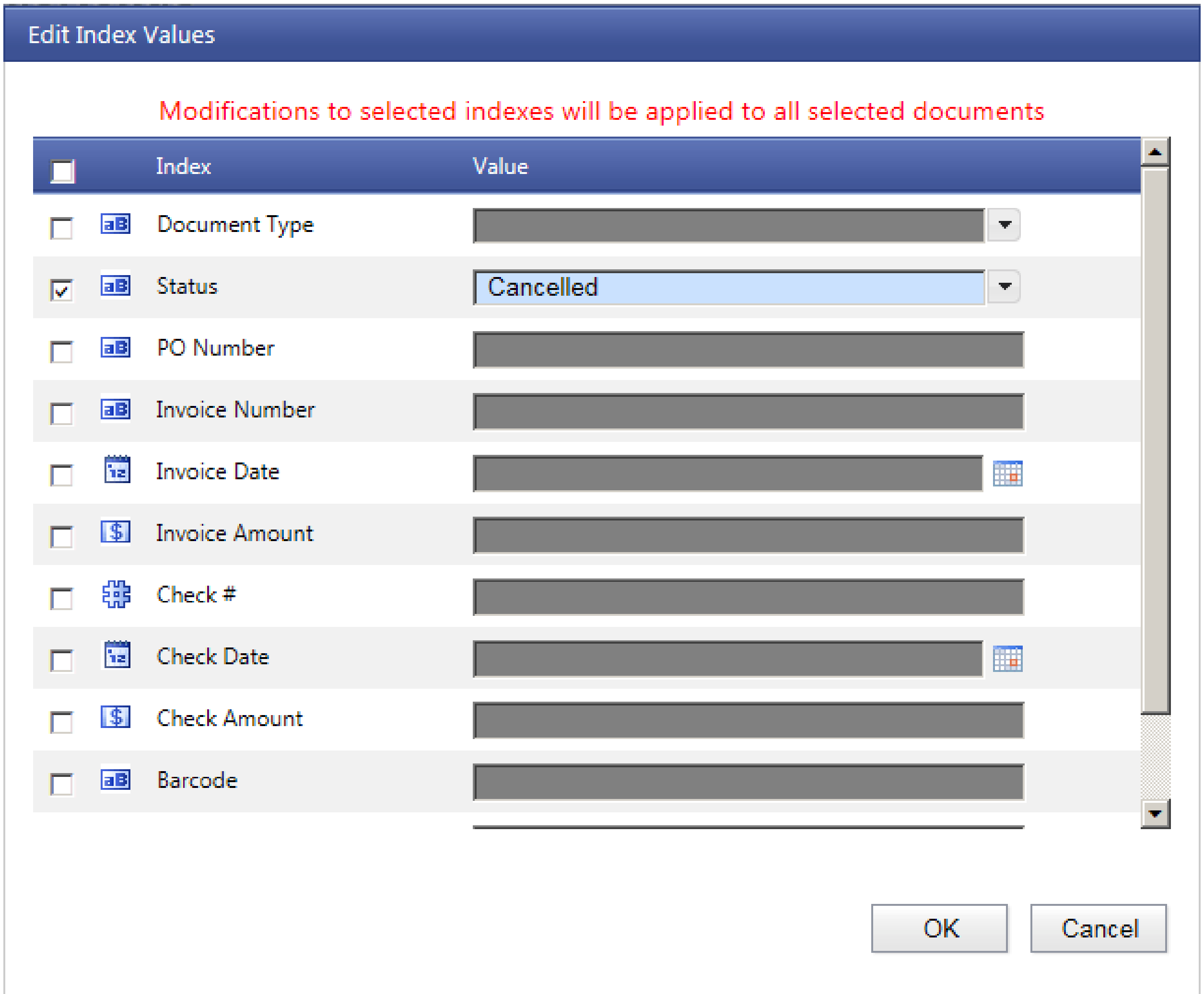
Key in new values in the blue highlighted box provided and click **Add**, or remove values by highlighting the value and clicking on the X icon. Hit OK to save your changes or Cancel to discard them.

If you need to update the index value of multiple documents, select the appropriate documents in the search results list by clicking on the checkboxes beside the document row, and click on the **Edit Index Values** icon as normal.

Multiple selected documents

	Action	Check #	Document Type	Status	Invoice	Invoice Date	Vendor Name
			PURCHASE ORDER	Data Entered			SUPER DATA COMPUTERS
		200	PURCHASE ORDER	Paid	222	1/30/2009	SUPER DATA COMPUTERS
		200	CHEQUE	Paid	222	1/30/2009	SUPER DATA COMPUTERS
		100	PURCHASE ORDER	Paid	111	2/1/2008	SUPER DATA COMPUTERS

The Edit Index Values window will appear with all of the index value boxes greyed out. Check on the index you wish to update, and enter it or select in from the dropdown provided. Hit OK to save your changes or Cancel to discard them.

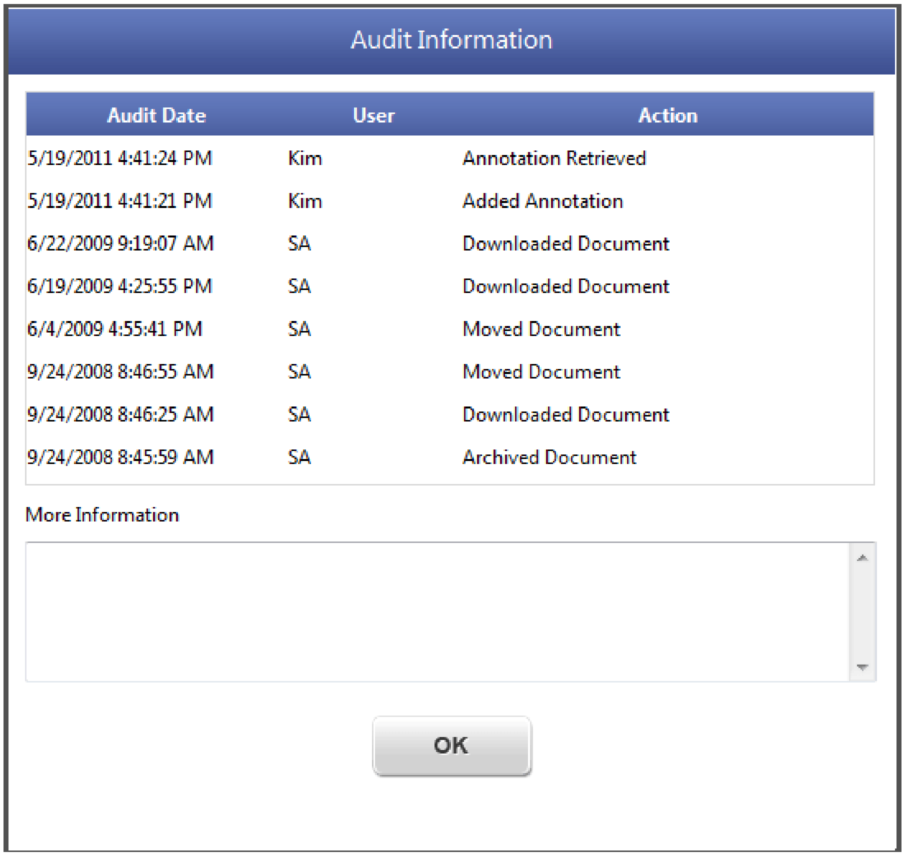


View Audit Information

The Audit Log is a secure and complete account of everything that has occurred to a document from the time it enters the FileNexus system. This allows you to view exactly who has accessed a document and what has been done to it.

FileNexus automatically logs each instance a document has been viewed, had notes added/removed, emailed, downloaded, moved between folders, or managed in any way, as well as stamps the date time and user id that carried out the event. By highlighting an entry in the top pane of the Audit Log tab, any available additional information about the event will be displayed in the Audit Record details

Only users with the proper access levels may access the Audit Information for a document. By clicking on the View Audit Information icon, an *Audit Information* window will pop up allowing an Administrator to review all of the actions on a document since being archived to the FileNexus system.



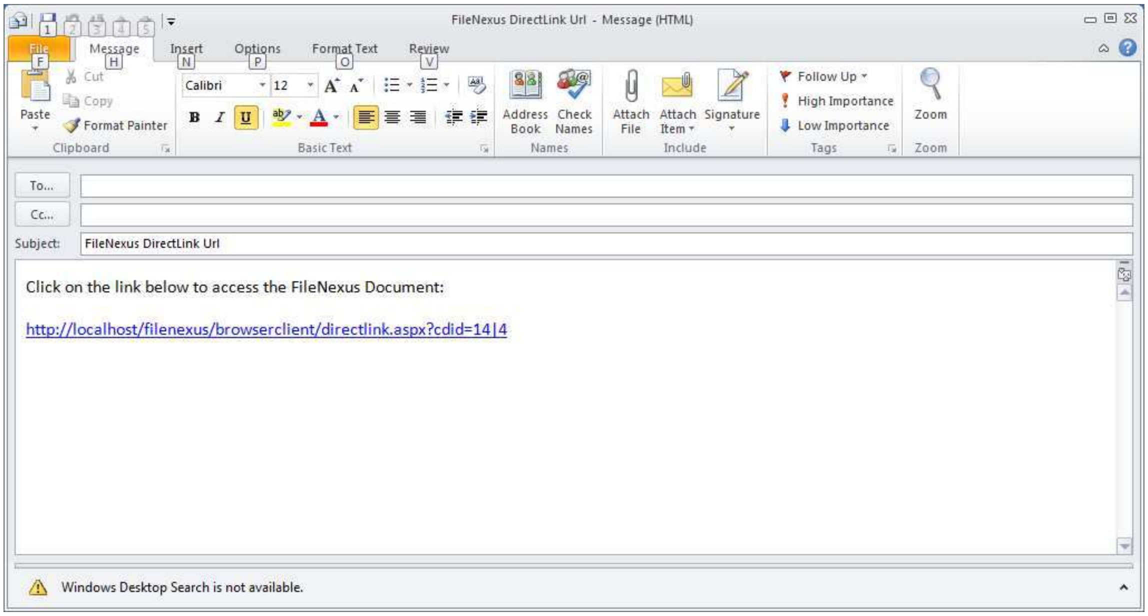
E-Mail DirectLink URL

This option allows you to email the direct link for this document to other FileNexus users. By clicking this icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the link to this document in the body of the email. Only FileNexus users will be able to view the document.

This method for sending documents the following benefits and applications:

1. You can use documents links when you want to e-mail a document to someone in your organization who has access to FileNexus. Since the document link is only a pointer file it is very small and takes up very few network resources. This is much more efficient than mailing the actual document.

2. Another use for document links is to help integrate FileNexus with your existing work flow solution. In this example, you might want to export all new invoices to a set of document links. These links would then be put through your existing work flow. Each time someone clicks on a link, the original FileNexus document will appear on his/her screen.



E-Mail Selected Documents
This option allows you to email the active document in the Search Results Grid. By clicking on the send icon, FileNexus will prompt you to enter the recipient's email address and send the document as an attachment in its native file format (tiff, .doc, .xls, .txt, etc.).

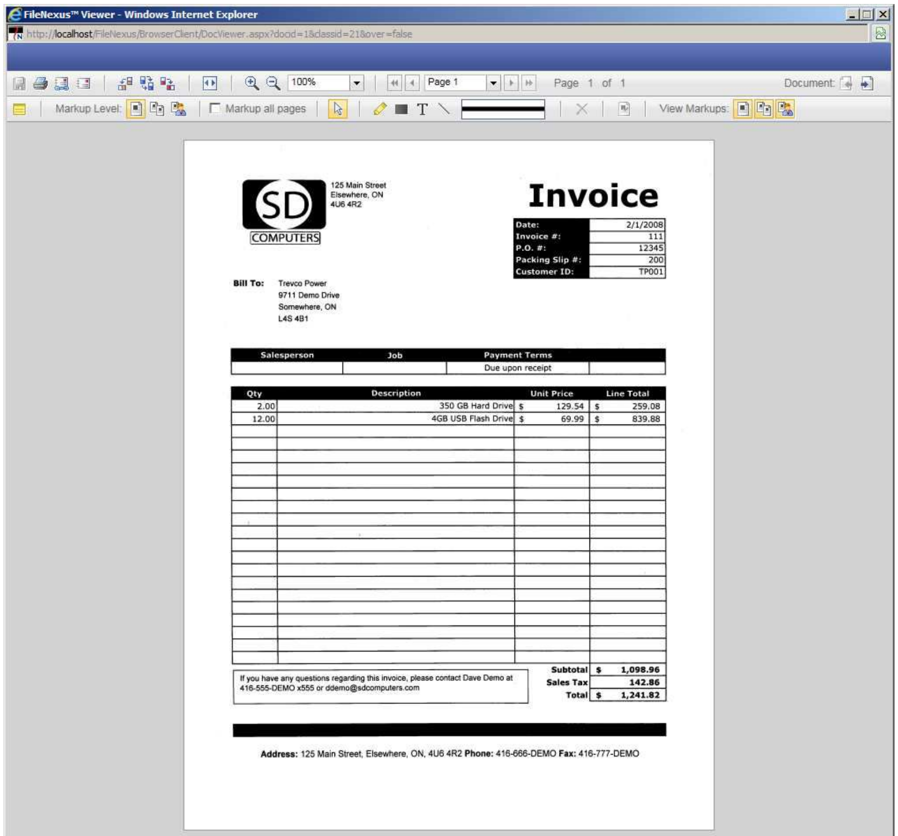
Move Selected Documents
This option allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the Search Results Grid that you wish to move and click the icon to select the new destination folder.

Export Selected Documents
This option allows you to export and save a copy of the selected documents in their native file format in a single zip file.

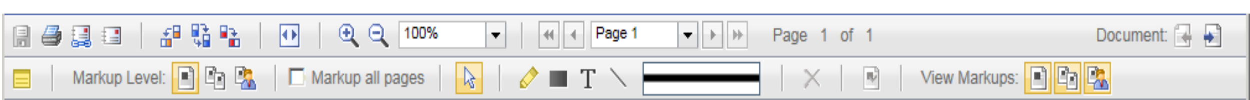
Export results as CSV file
By clicking on this icon, the entire search results list of index values will be exported to a CSV file for import into Excel for your reconciliations or reporting needs. When you click this icon, you will be prompted to Open or Save the CSV file.

Viewing Scanned Tiff Documents

When open a Tiff image document, the document is viewed in the FileNexus embedded viewer. Please note that other document types will display their native application's icon in the Action column allowing the user to open or save the document.



Embedded Viewer toolbar



Print 

The printer icon allows you to print the current document in the preview pane. Upon clicking the printer icon, a print dialog page will appear allowing you to select print options, such as number of copies.

E-Mail DirectLink URL 

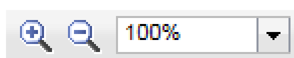
This option allows you to email the direct link for this document to other FileNexus users. By clicking this icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the link to this document in the body of the email. Only FileNexus users will be able to view the document.

E-Mail Selected Documents 
This option allows you to email the active document in the Preview Pane. By clicking on the send icon, you will be prompted to enter the recipient's email address. FileNexus will then email the attached document to the recipient.

Move Selected Documents 
This option allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the Search Results Grid that you wish to move.

Rotate Document 
The rotate icons allow you to rotate the document (rotate left, right and 180 degrees)

Expand Document 
This option allows you to expand the document to the full width of the page.

Zoom Document 

This option allows you to zoom in or out of the document or select the zoom percentage for the document.

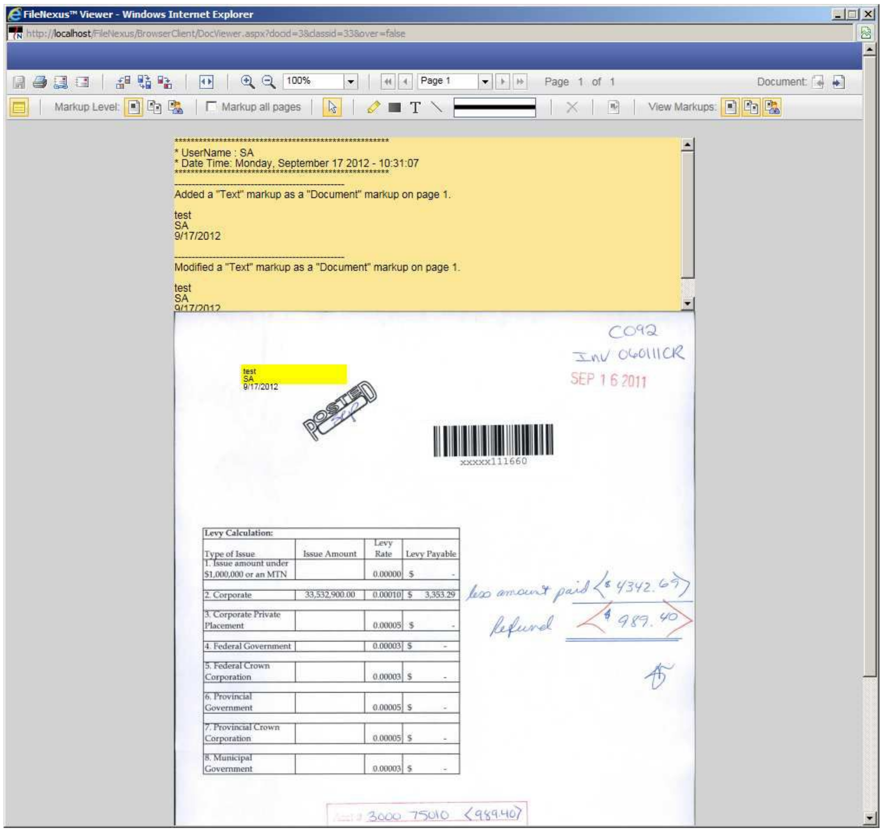
Document Pages 

This option allows you to scroll through the different pages of the document or jump to a certain page by selecting the page number from the page drop down.

Document Navigation 

This option allows you to browse through documents in the search results grid by clicking the *Next Document* and *Previous Document* without having to exit the viewer and opening the next document.

View Document Notes 
This option allows you to view annotations on the document. Once you click the *View Notes* icon, the notes are displayed on the document as the example below illustrates.



Select Markup

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

Highlighter Markup

This option allows you to highlight areas of the current document clicking and dragging your mouse to select a zone. If you wish to change the highlighting colour, right-click on the highlighted area and select Properties. This will prompt a popup window, allowing you to modify the colour.

Blackout Markup (Filled Rectangle Markup)

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

Line Markup

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

Text Markup 

If you wish to put an electronic "post-it" type of note on an image document, click on the Text Markup icon. Then, "draw" a box onto your document. This will open up a Text Properties dialog for you to enter text into.
You can change the text font or background colour by clicking on the Text Font or Background Color buttons. If you don't wish the text markup to obscure the image, turn on the transparent checkbox. Then click OK. The text markup will then appear on the document with the user login name and date stamp visible.

Markup All Pages 

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

Markup Application Level 

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

Document Markup 

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

Class Markup 

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

User Markup 

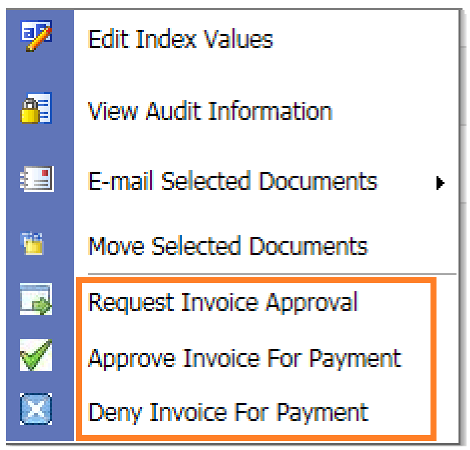
A User markup will create a markup on the current document only visible to the user that created it. This is useful if a user wants to leave himself/herself an electronic reminder note on a document that some action has taken place or needs to be taken.

FileNexus Workflow

When business workflows are defined and configured in FileNexus, users may see custom **Workflow Buttons** or custom defined Workflow Actions in a right-click menu when managing archived documents.

Workflow Buttons

Example buttons



Example custom workflow actions

Workflow processes may include (but are not limited to) approvals, signatures, information requests, automated document routing, automated email notifications, data updates of host systems, etc.

For further information on defining and configuring workflows in FileNexus or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

My Tasks

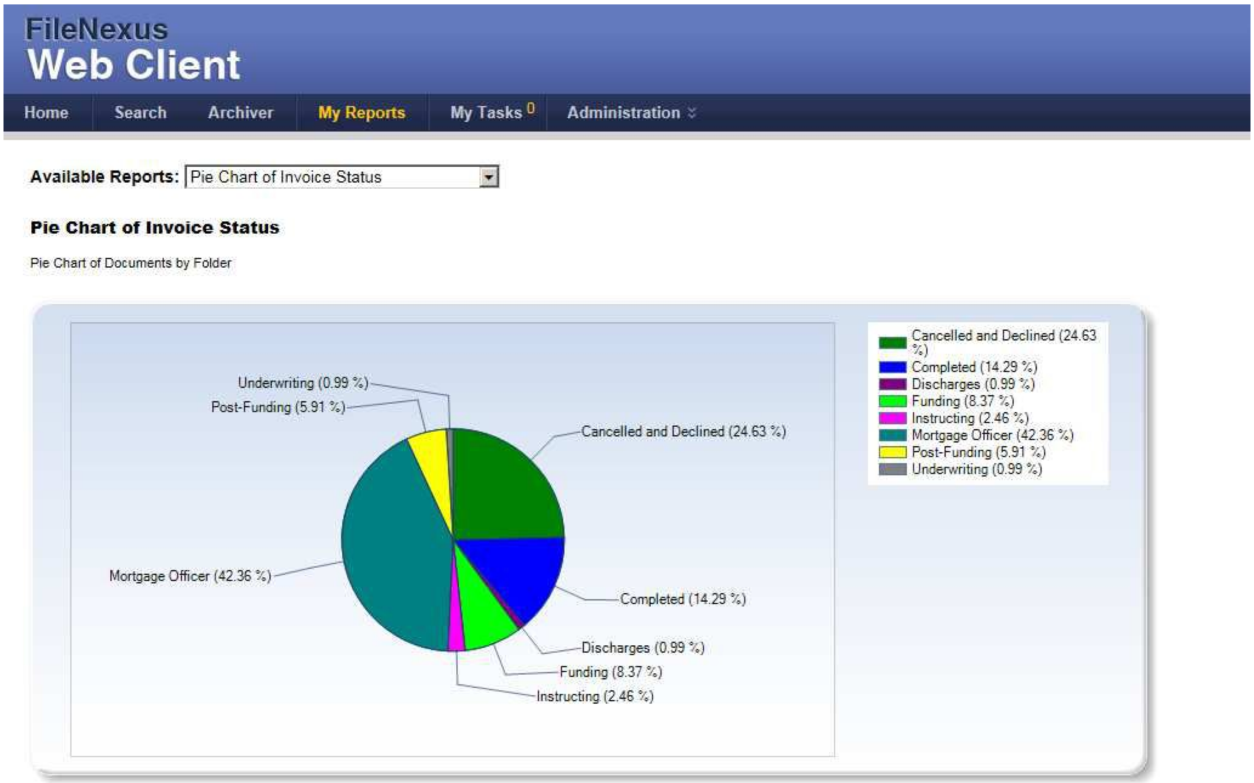
If a workflow process has been configured in FileNexus, users that are assigned workflow tasks may receive real-time notifications in the My Tasks section for outstanding tasks.

For more information on setting up workflows or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

My Reports

Configuring Custom Reports

The **My Reports** menu provides users the option to view custom reports that have been configured by a FileNexus administrator. Custom reports can be configured to report on any number of predefined criteria as in the example below.



Custom reporting can be configured for any number of documents captured in FileNexus, detailing the current status of business workflows, breakdown of categories of documents, user activity in FileNexus, etc.

For more information on configuring custom reports or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

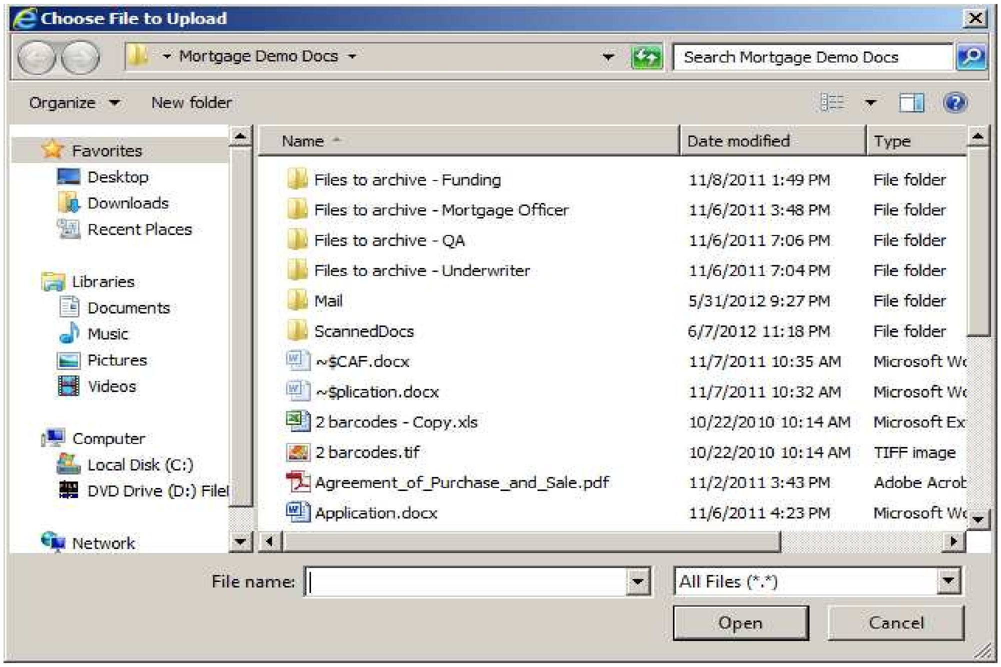
Archiving Documents

Within the FileNexus web client users can archive documents to FileNexus using the **Archiver** menu selection.

Selecting the **Archiver** menu will display a dialogue which will allow users to select which documents they wish to archive to FileNexus.

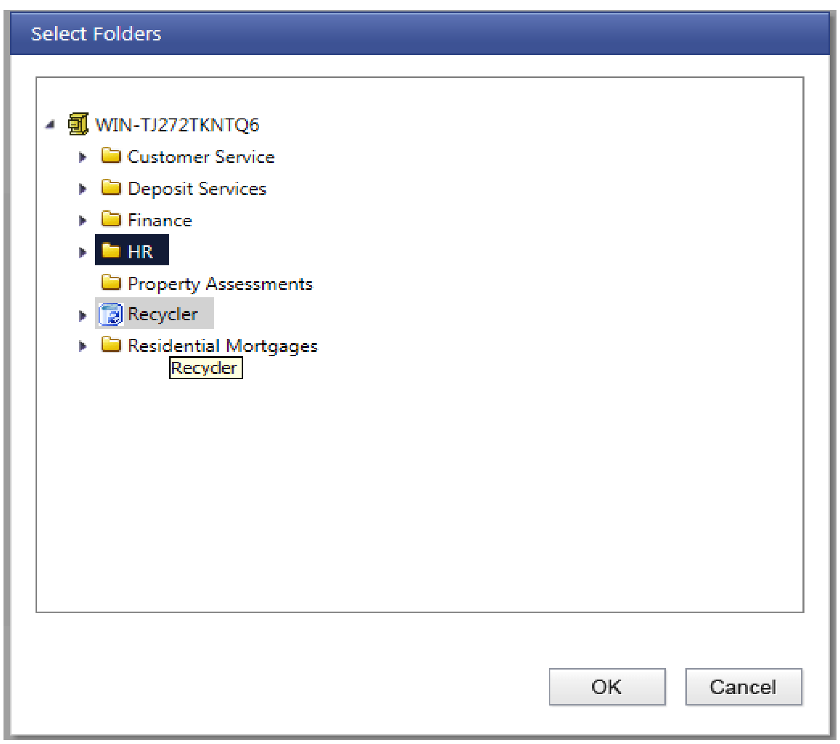
Browse

Choosing this menu button will open up a window which will allow the user to choose which file they want to archive.

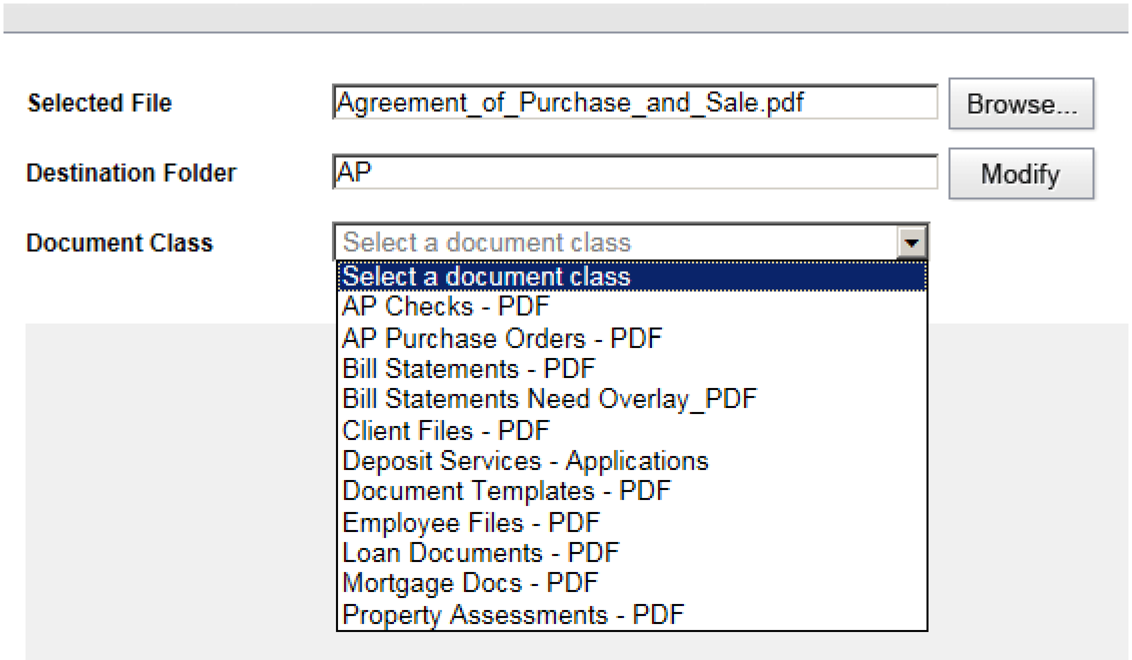


Modify

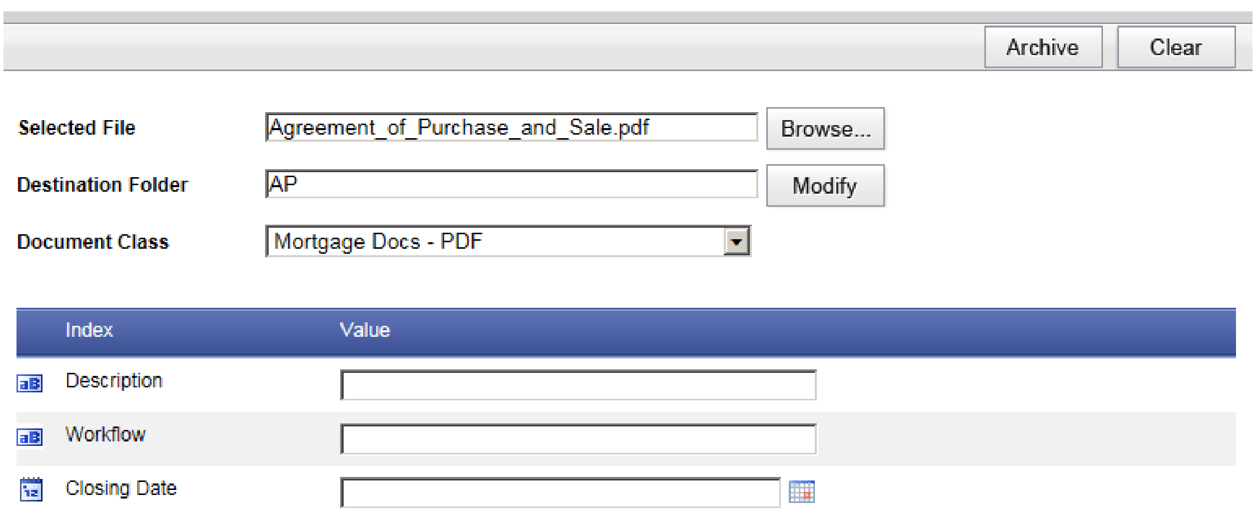
Choosing this menu button will allow the user to choose which folder the selected file will be archived to within FileNexus



Document Class
Selecting this drop down menu will present the user with a list of document classes that can be applied to the document selected for archive.



Once a document class has been selected, you will be prompted to enter the associated index values.



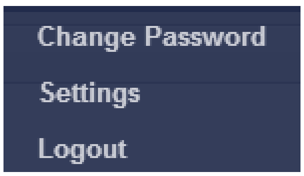
Once all the appropriate indexes have been entered, you can click on the Archive button to archive the documents into FileNexus.

Web Client User Menu

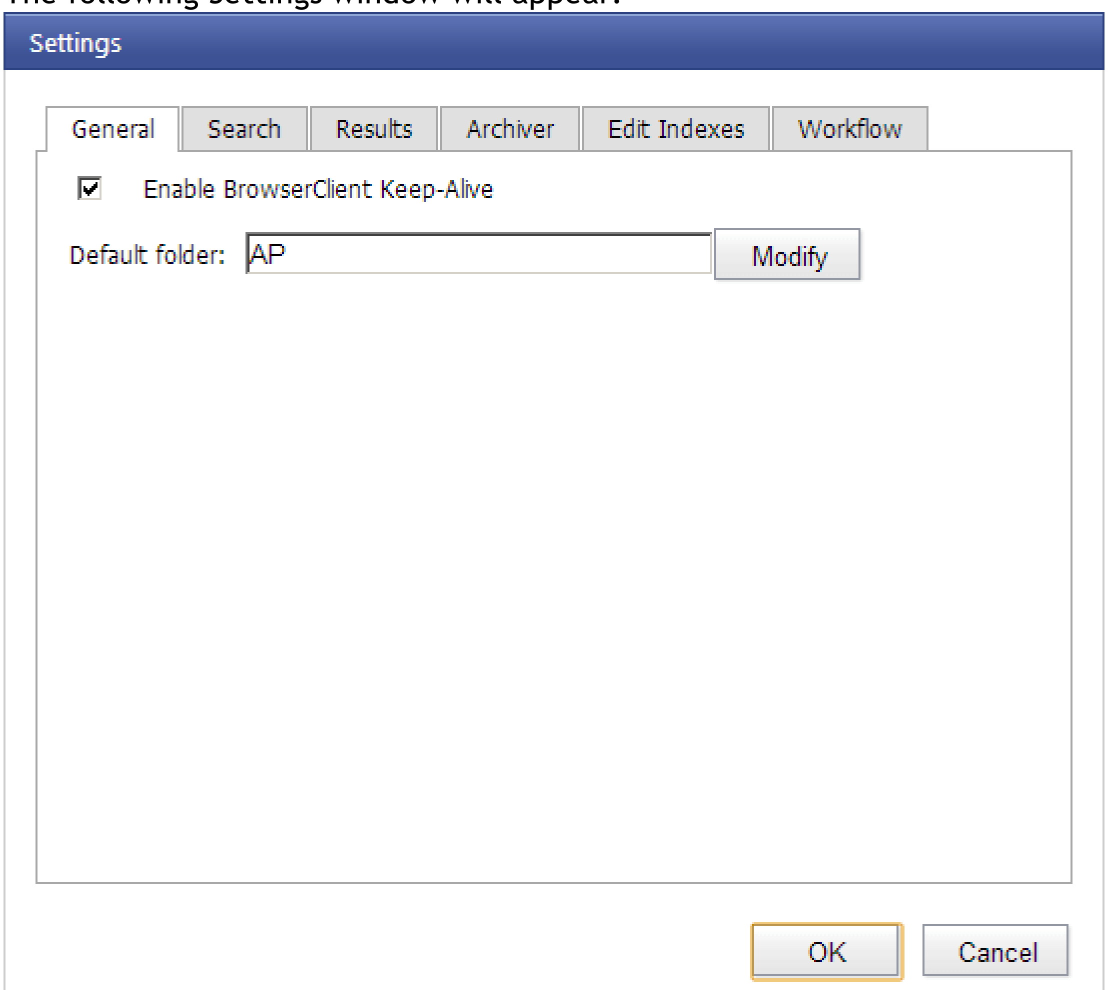
The Web Client includes a user menu in the top right corner of the browser. From here, a user can change their password (covered previously), manage user settings that can persist for the user logged in, or logout of the Web Client by simply selecting Logout.

User Settings

To access the settings screen, click on your user name from the top right hand and select the Settings option.



The following Settings window will appear.



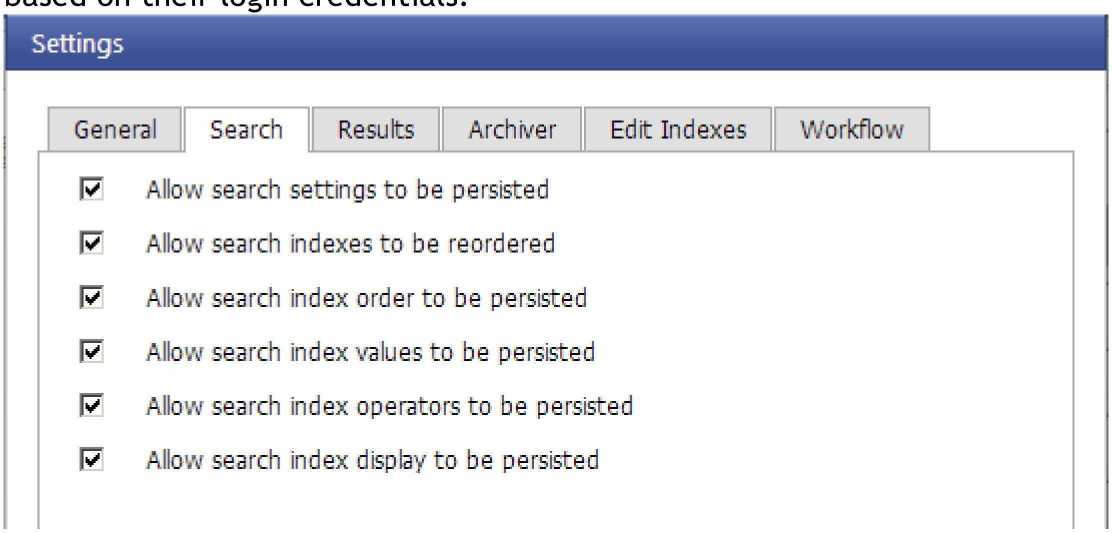
General Tab

Enable BrowserClient Keep-Alive
By checking ON this option, any predefined timeout period will be ignored if the Web Client browser is still open on a user PC, but does not have any activity for a prolonged period. Perhaps the user went to lunch or is away from their desk, for example. If this option is OFF, the predefined timeout period (usually between 5 and 20 minutes) will force the user to login again if the Web Client browser has a period of inactivity for as long or longer than the timeout period.

NOTE: This option will only appear if it is enabled on the FileNexus Server.

Default Folder
When a user logs into the Web Client for the first time, the cursor will highlight the FileNexus Server name in the folder tree. If a user typically searches on the same folder (or parent folder) most of the time, they may set the "Default Folder" so that each time they log into the Web Client, the default folder is already highlighted and they can immediately conduct their desired search. To select a "Default Folder", simply click the Modify button and select the folder from the window that appears before hitting OK.

Search Tab
The Search tab allows a user to set their search preferences which will persist based on their login credentials.



Allow search settings to be persisted
By default, this option is checked ON. This means FileNexus will track the user's Document Class and Subfolder Search preferences based on the folder being searched. If this option is turned OFF, all document classes and

subfolder searching will be assumed ON for all folders even if those preferences were changed on a previous search.

Allow search indexes to be reordered
By default, this option is checked ON. This means the user can reorder indexes on the Index Search tab of the search pane, for easier search criteria input. To reorder the indexes on the Index Search, click on the index name and drag and drop the index to the desired location.

Allow search index order to be persisted
By default, this option is checked ON. This means that any reordering of indexes in the search screens will persist based on the user's login credentials and browser being used.

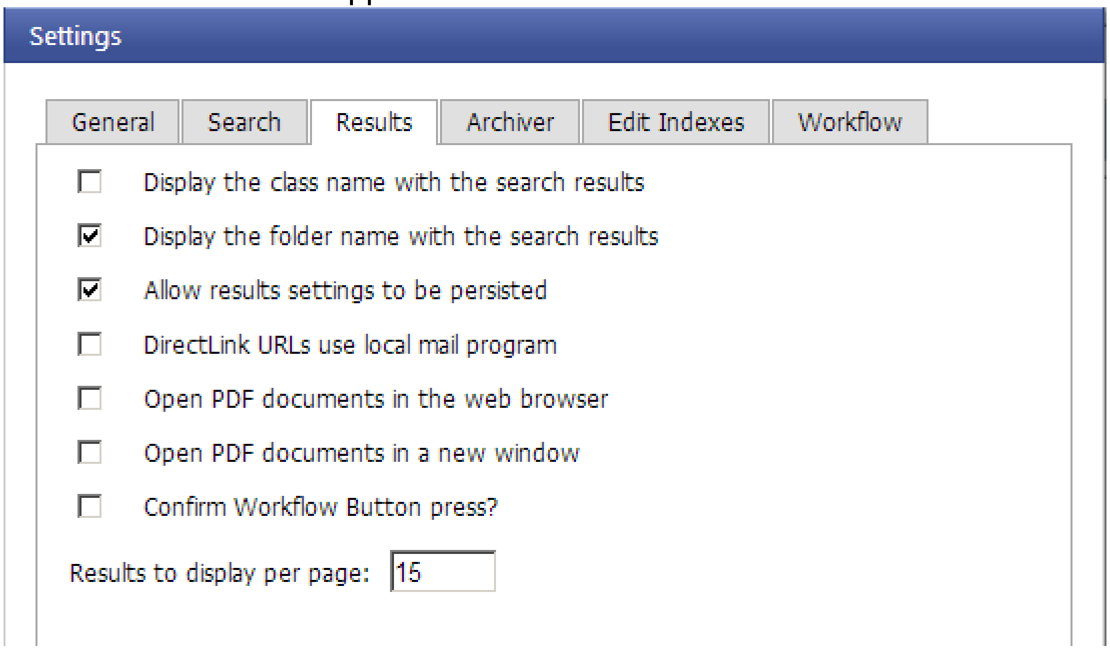
Allow search index values to be persisted
By default, this option is checked ON. This means that FileNexus will track up to 5 of a user's previous search criteria in the Index Search Value edit boxes or drop downs. Additionally, the previous search criteria used for an index on a Document Class will appear in the Index Search Value until the value is changed or cleared in a subsequent search.

Allow search index operators to be persisted
By default, this option is checked ON. This means that FileNexus will track the previous search's operators chosen (Equals, Less than, Contains, Between, etc.) based on the user's login credentials and browser being used.

Allow search index display to be persisted
By default, this option is checked ON. This means that any indexes set to display or not display (in the search results and/or on the search panes) will persist based on the user's login credentials and the browser being used.

Results Tab

The results tab should appear as follows.



Display the class name with the search results
When this option is enabled, the document class will be displayed as a column in the search results grid.

Display the folder name with the search results
When this option is enabled, the document folder will be displayed as a column in the search results grid.

Allow results settings to be persisted
If this option is checked ON, any grouping of search results, reordering of index columns, filtering boxes, etc. will persist based on the user's login credentials.

DirectLink URLs use local mail program
When this option is enabled, clicking the DirectLink URL for documents will result in the local mail program to be launched. Otherwise, the user can copy the link and paste it into another application or window.

Open PDF documents in the web browser
When this option is enabled, PDF documents will open in the same browser window.

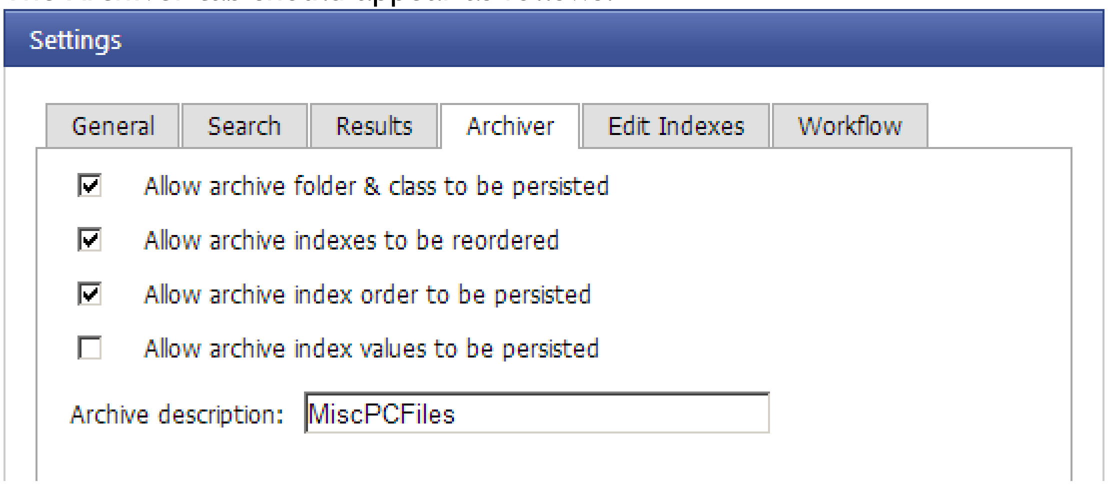
Open PDF documents in a new window
When this option is enabled, PDF documents will open in a new browser window.

Confirm Workflow button Press
When this option is enabled, user will be notified upon clicking a workflow button to confirm the selection.

Results to display per page
This option sets the default number of documents that will be displayed per page in the search results page.

Archiver Tab

The Archiver tab should appear as follows.



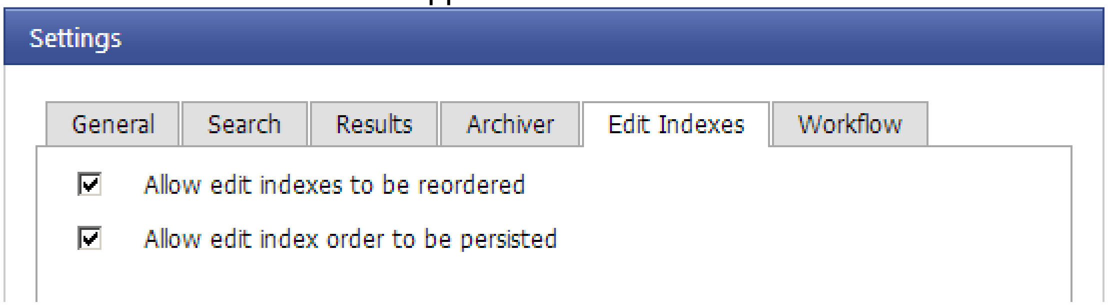
Allow archive folder and class to be persisted
This option would allow you to save the previous folder and class that documents of the same file extension are archived to. This feature is useful when archiving documents of the same type that should go to the same folder and document class as it eliminates the need to choose the destination folder and document class for each document.

Allow archive input indexes to be persisted
This option will allow you to keep previous input indexes when archiving new documents. This can be useful when importing similar documents to help minimize index input.

Archive description
This entry is an alias that corresponds to a folder path on the FileNexus Server. The alias or "Description Path" must already be set in the FileNexus Server Properties on the FileNexus Server. If this is left blank, documents being archived will route to the single default "Client Archive Path" defined on the FileNexus Server.

Edit Indexes Tab

The Edit indexes tab should appear as follows.

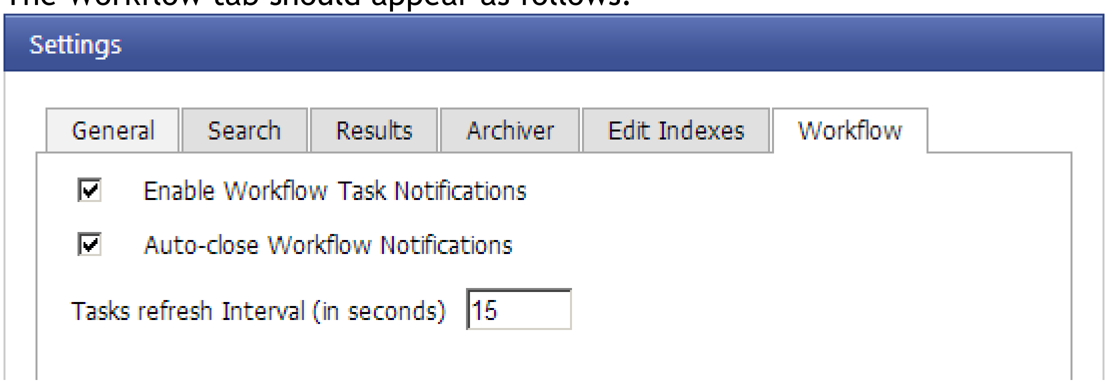


Allow edit indexes to be reordered
By checking ON this option, users with the rights to edit indexes for archived documents may reorder the indexes for easier value input.

Allow edit index order to be persisted
By checking ON this option, the reordering of indexes when editing values for archived documents will persist based on the user's login credentials and browser being used.

Workflow Tab

The Workflow tab should appear as follows.



Enable Workflow Task Notification
When this option is checked ON, a notification window will appear on the bottom right corner of the screen notifying users of new task assignments.

Auto-Close Workflow Notification
When this option is checked ON, workflow notification will be displayed for a few seconds and then automatically close. Otherwise the user will need to manually close the notification window.

Tasks refresh Interval
You can set a duration (minimum 10 seconds to maximum 3600 seconds) which will trigger the Task count to be refreshed on the web browser.

End of Document