FileNexus Web Client
User Manual Version
7.43

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Overview

The FileNexus Web Client is a web-based application used for searching, viewing, and managing documents archived to FileNexus.

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.

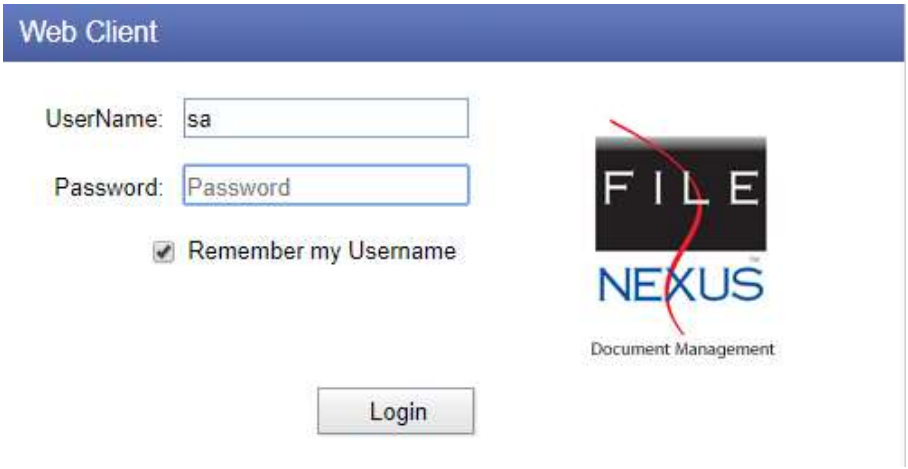
Web Client Login

Starting the Web Client

To launch the Web Client, simply open your Web Browser (Internet Explorer 9 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.

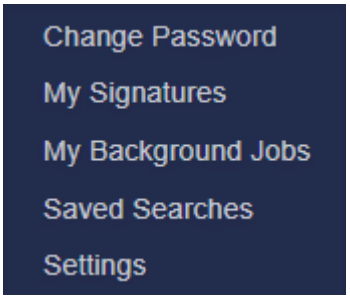


If your organization is using *Single Sign On* authentication, you will be logged into the Web Client automatically if you have already signed onto the PC with a valid domain account and password.

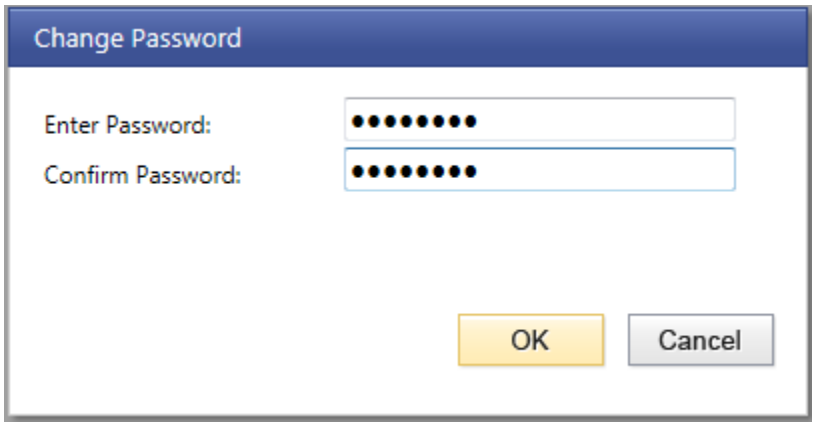
The Web Client allows users to quickly search for, and view archived documents in the FileNexus System. The following sections will review the searching, viewing, and document management features available to FileNexus users in the Web Client.

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.



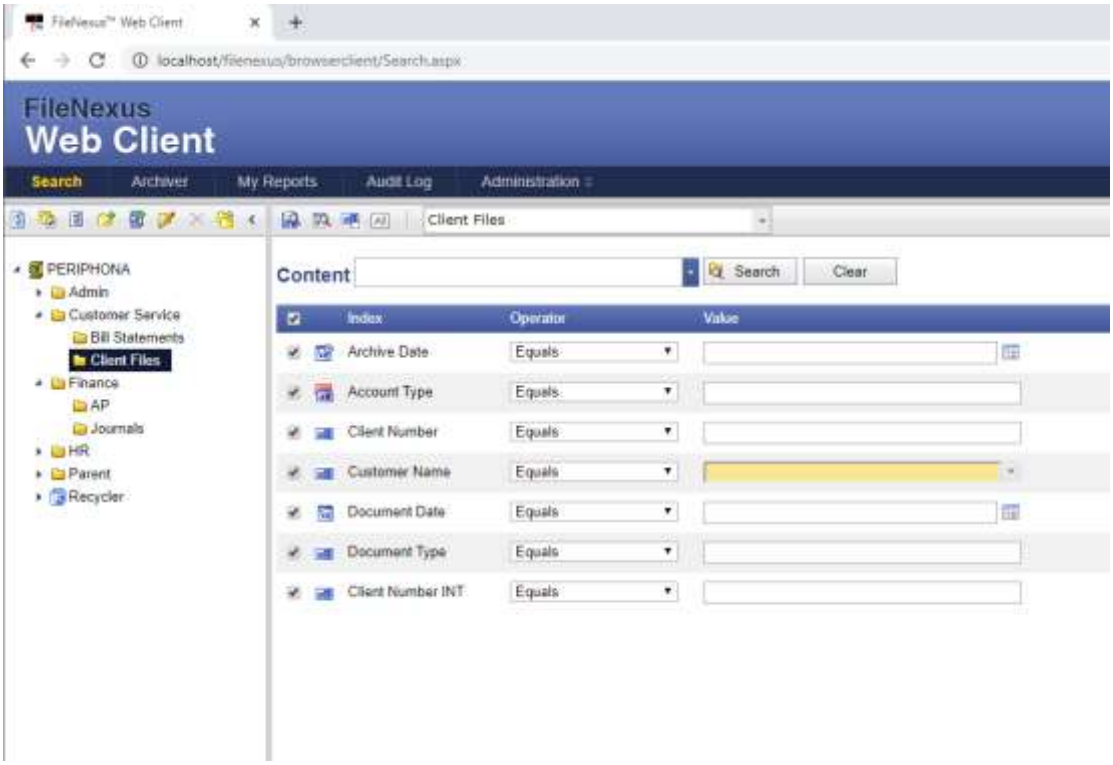
NOTE: Users may only change their password if they have security rights to do so, as set up by the FileNexus Administrator or a user set up as the Manager of that user or a group in which the user is a member. FileNexus password changes will have no effect if Active Directory Authentication is being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

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

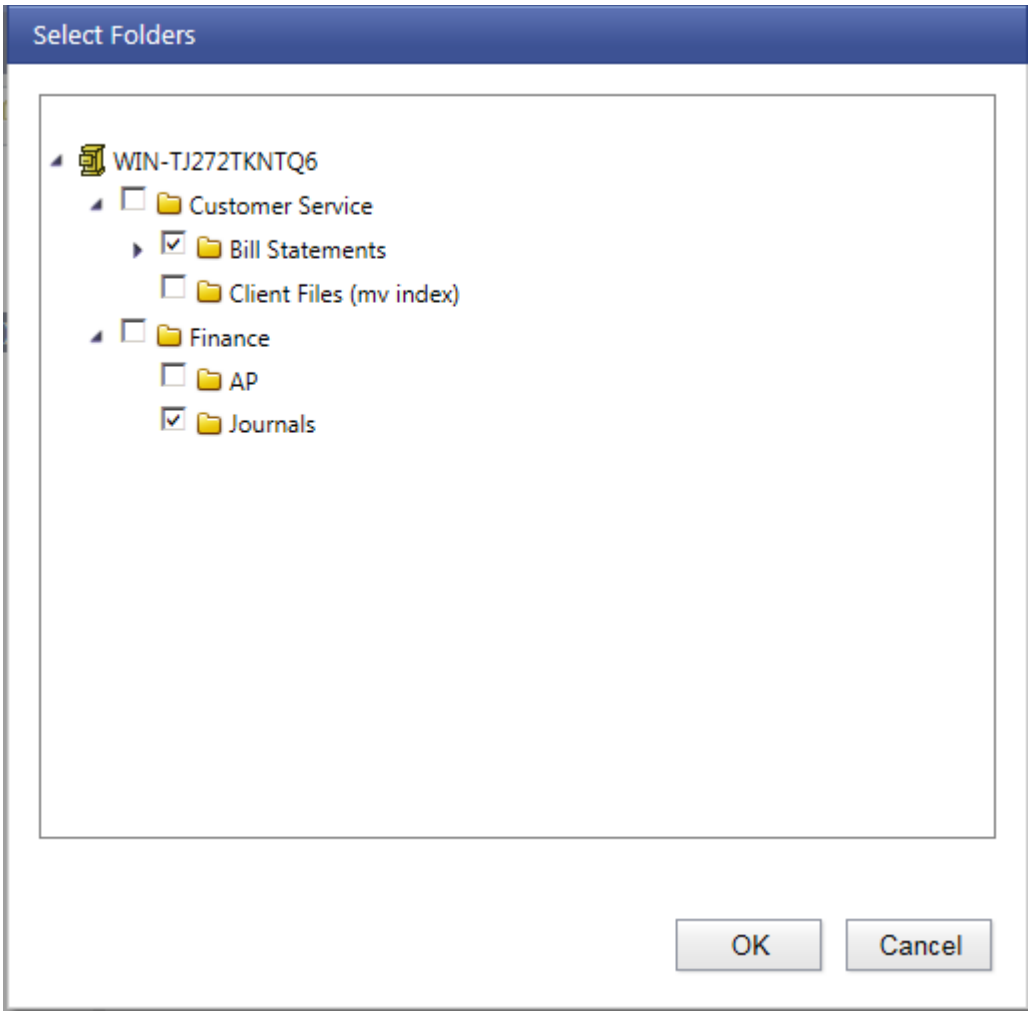
There are several icons in the Folder Tree toolbar that can help you manage and adapt your FileNexus environment.



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.

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

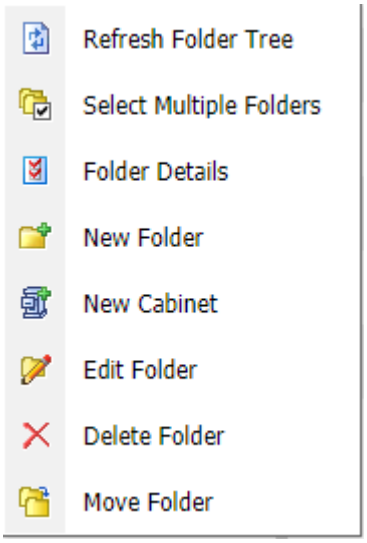
The File Cabinet icon allows you to access or set up a custom File Cabinet for your own searching needs. This feature is useful when performing regular cross folder searches.

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.

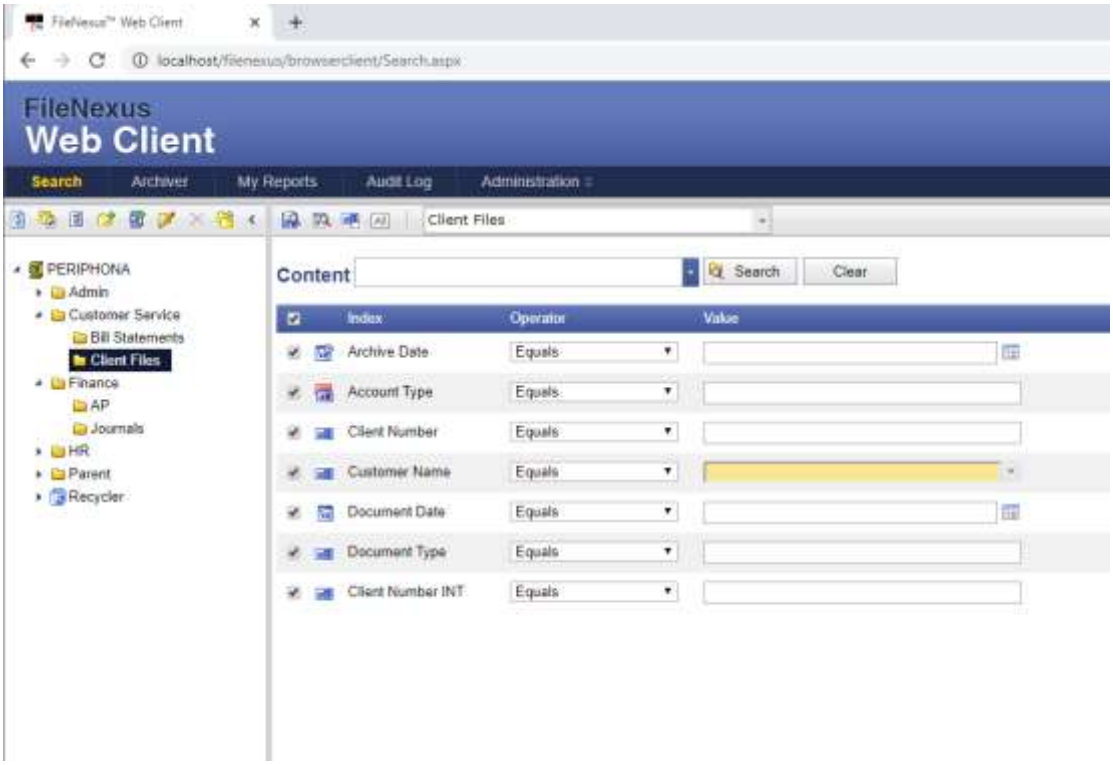
NOTE: Depending on your user rights in FileNexus, some or all of the options in the Folder Tree tool bar may also be accessed through a convenient right-click menu.



Searching for Documents

A Search Example

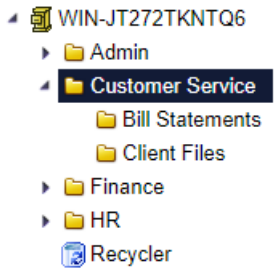
After logging into the Web Client, the users will be able to view the same folder-tree structure they would have access to if they logged into the Windows Client.



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. 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.

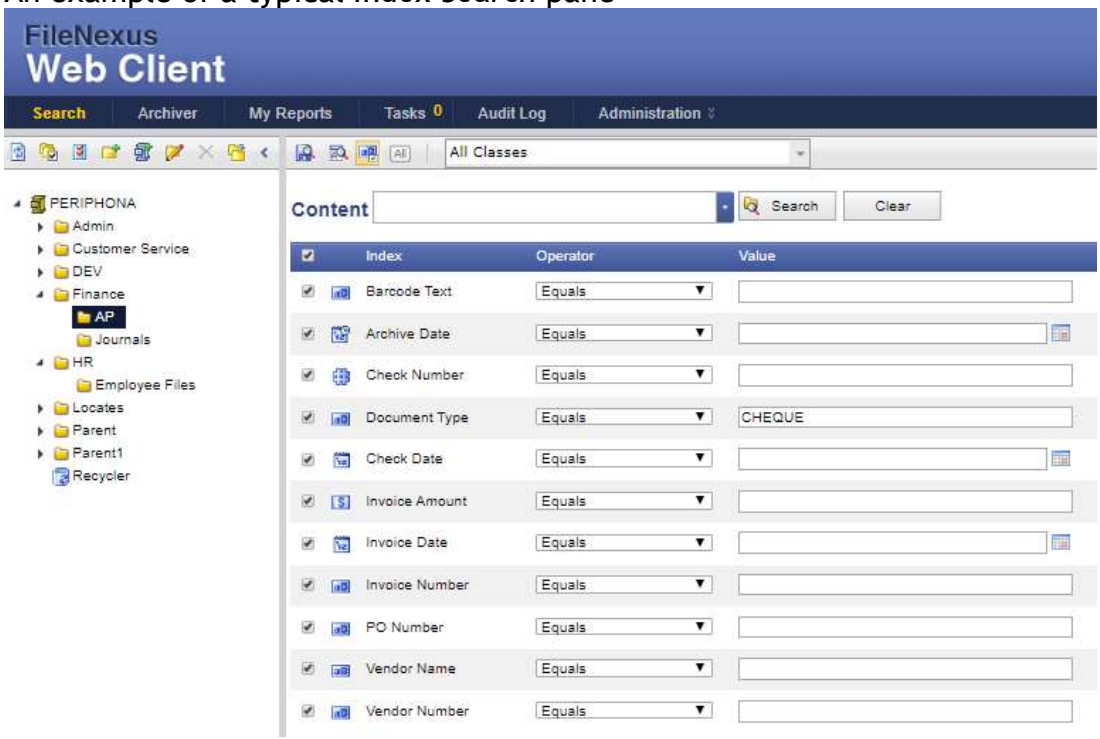


Once the folder is clicked on, the index search pane will appear.

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.

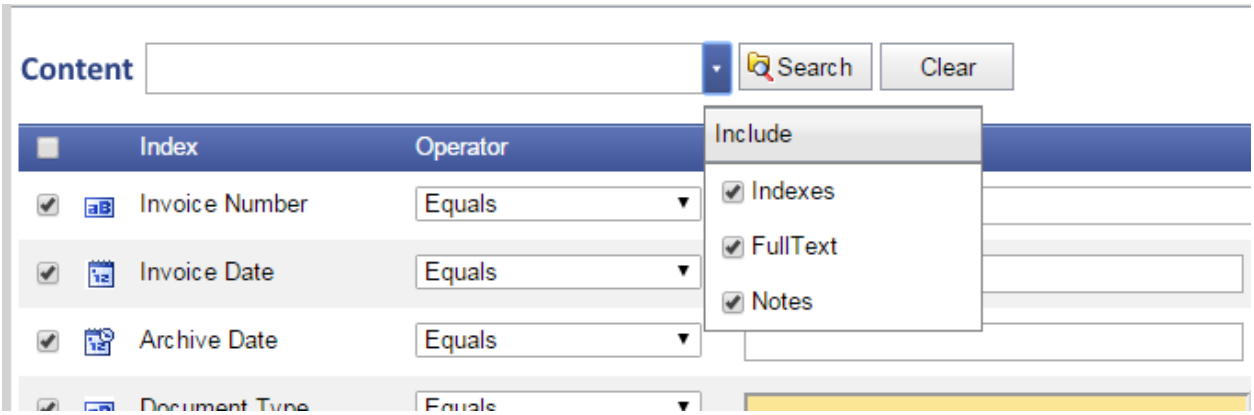
An example of a typical *Index Search* pane



In the above example, the user is searching for AP documents with the Document Type of “CHEQUE”. Once the user clicks the Search button, the matching results are displayed.

The Content Search

The Content search box provided allows you to enter search criteria that may exist in any applicable index value, Annotations OR the content of a full-text indexed document. You have the option to choose the depth of the Content search by clicking the blue arrow next to the text box as shown in the below example.



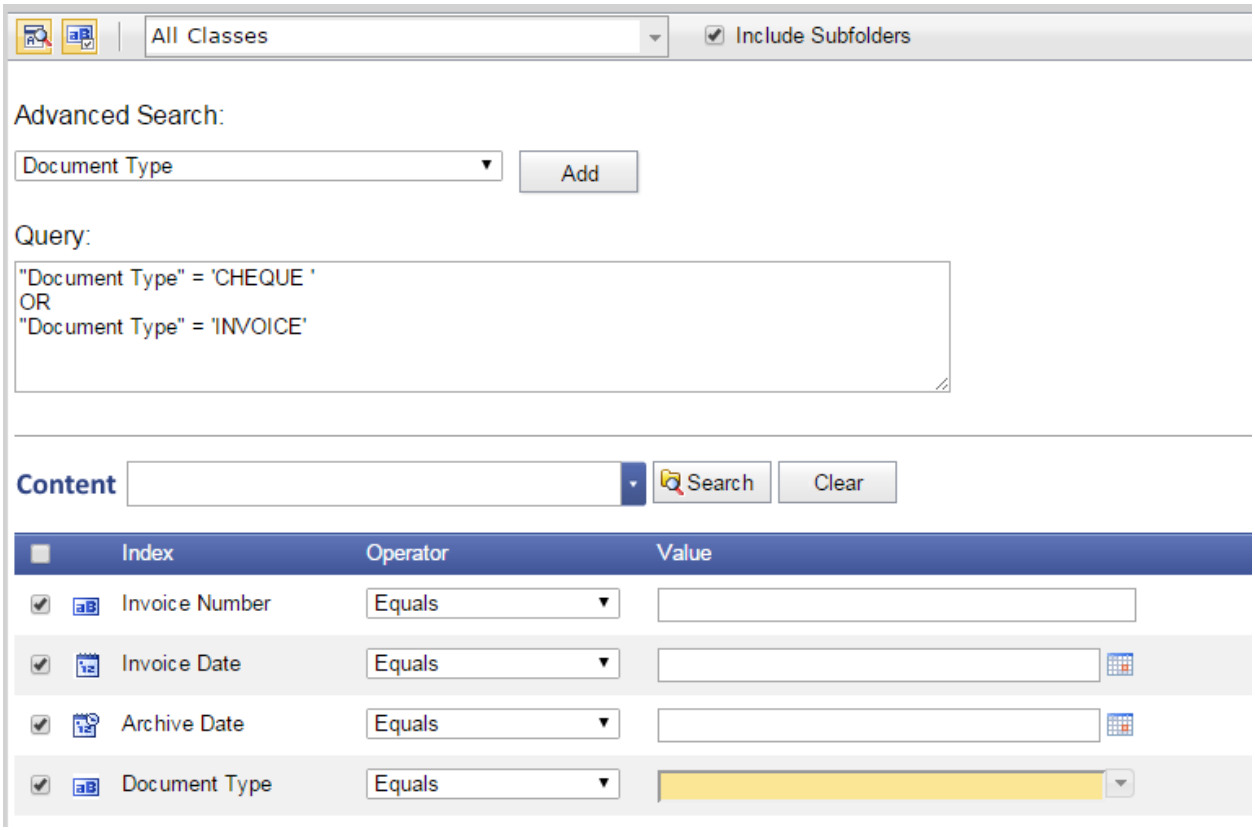
For example, by entering a string, only Text data type indexes will be searched along with the content of full-text indexed documents and the annotations. If you enter a numeric value or date, all index values will be searched along with the content of full-text indexed documents.

NOTE: By using the Content 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 Content Search box must be true when recalling search results.

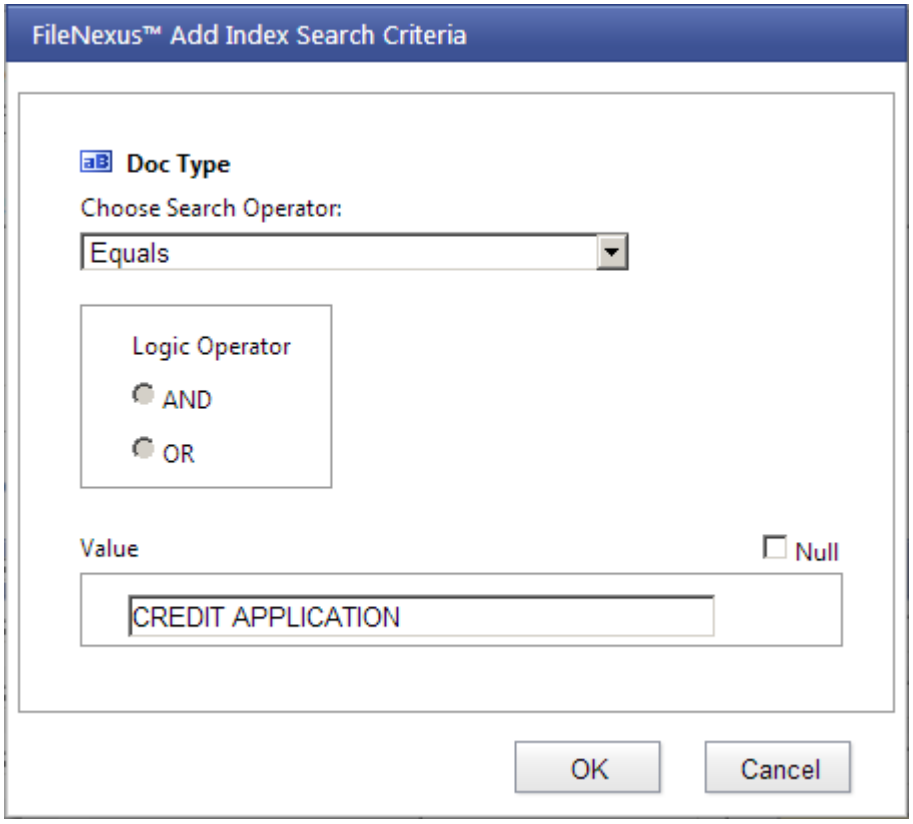
Advanced Searching

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.

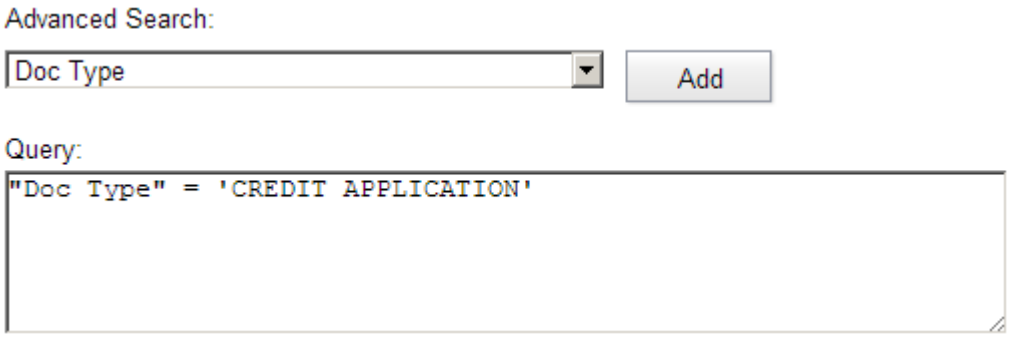


To create your advanced search query, select the first index for which you wish to add search criteria from the dropdown provided and click Add. This will launch another window in which you can enter the search value.

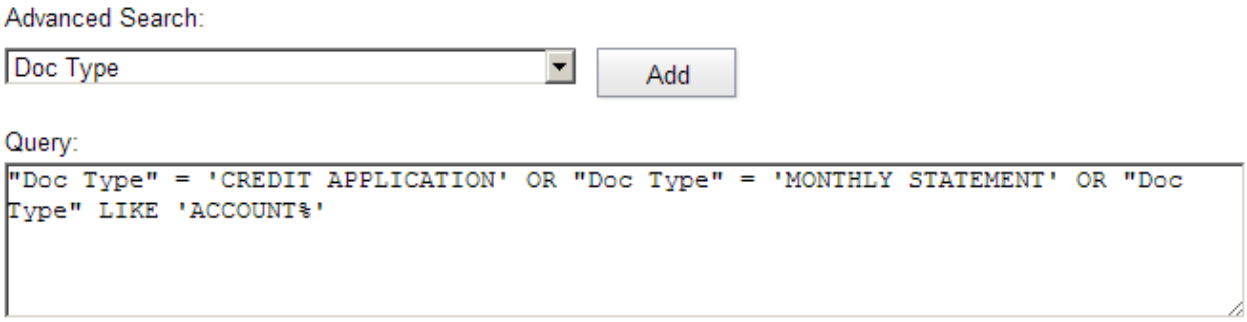


In the new window, choose the Search Operator and then enter the value in the edit box provided before hitting OK.

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

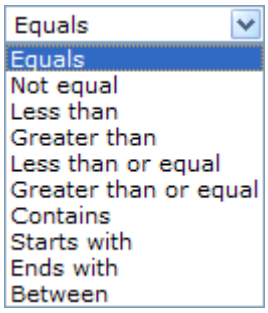
Each icon immediately to the left of an Index name indicates the index's data type, and therefore is a good indication to you of what sort of information to enter in the *Value* column for search criteria.

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

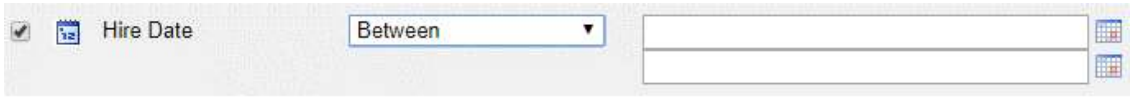
Index
This column contains the name of the indexes that exist on the documents within the folder.

Operator

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

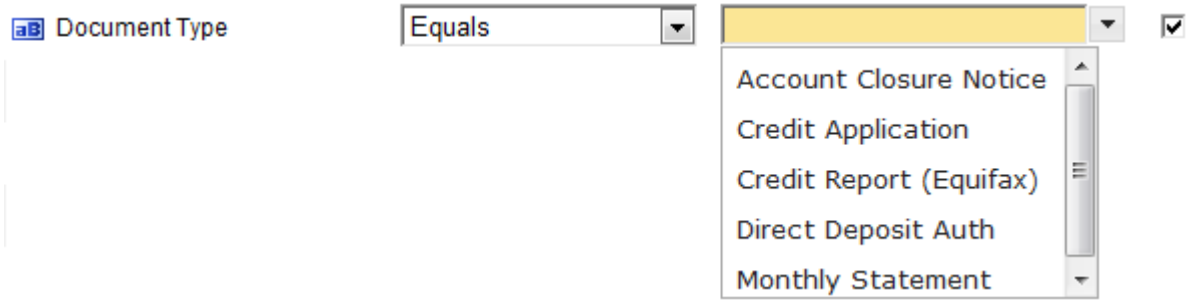


If choosing "Between" as your comparison operator, you will need to enter two values as in the example below. All other operators require only one search value.



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.

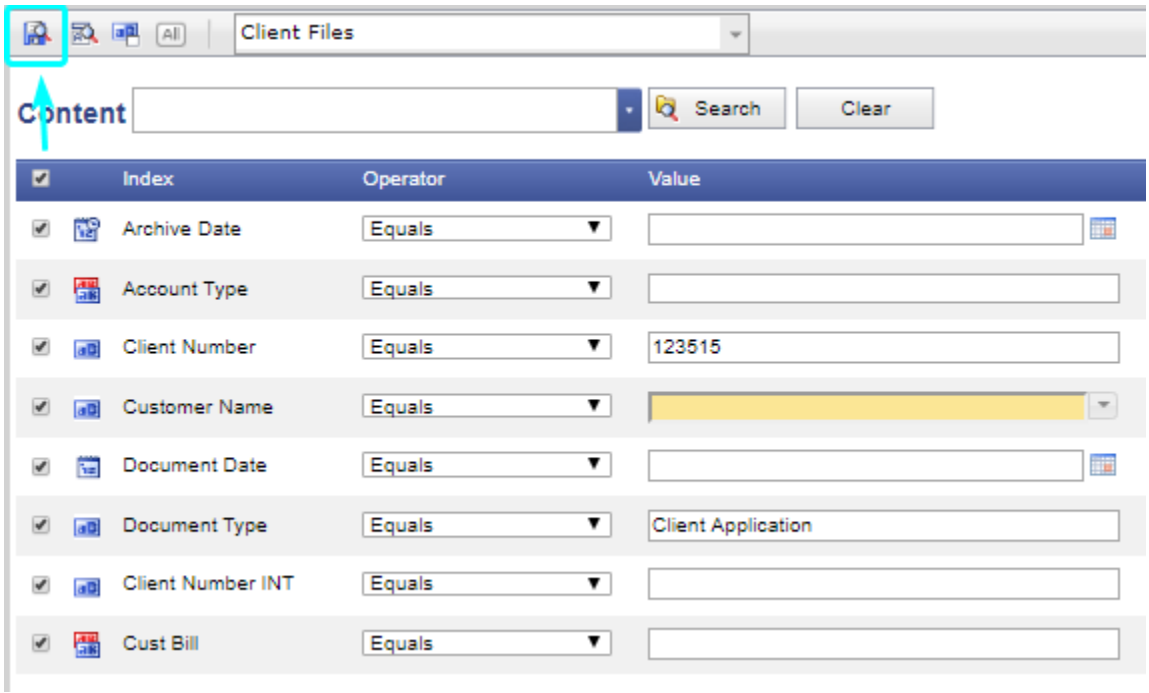
NOTE: At least one index must be checked on for display or you will not receive any search results.

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.

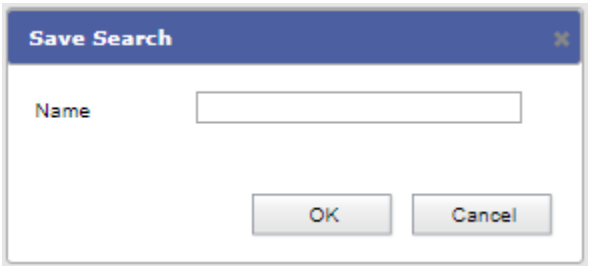
In a very basic search, you may select an operator, enter a value, and click Search.

Saving Searches

Saving searches is useful when same search is constantly done. To save a search to click on the Save Search icon



A pop up will appear, enter a name for the search and click ok.



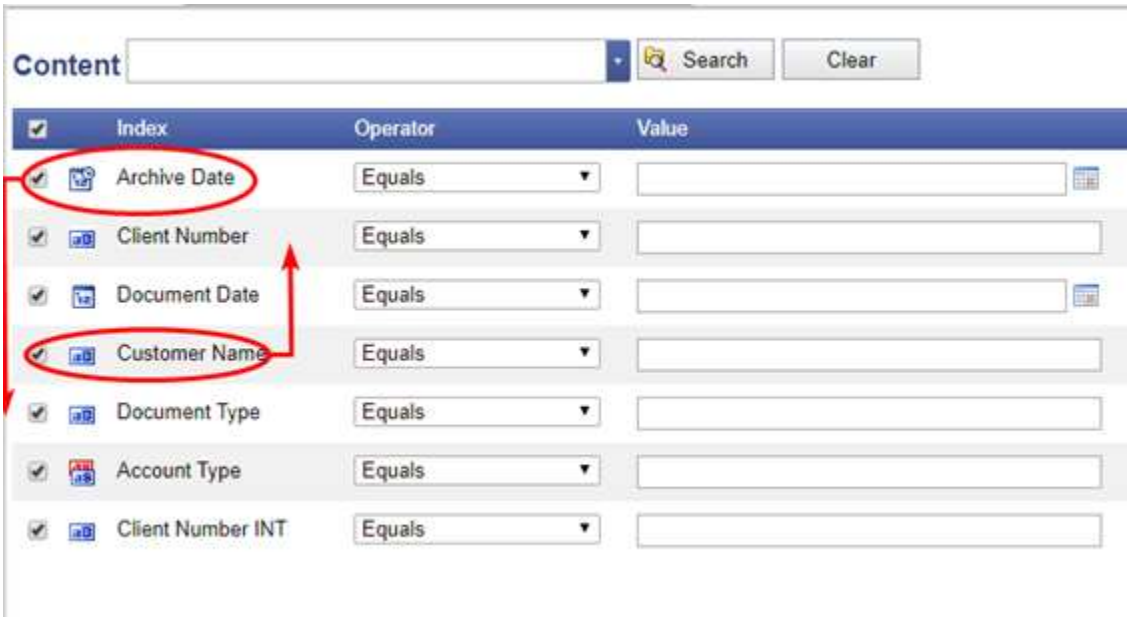
To access the Saved Searches, click the User menu and select Saved Searches. A pop-up will appear. Clicking on a Saved Search name will execute the search that is saved.

Customizing the Search Pane

The 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).

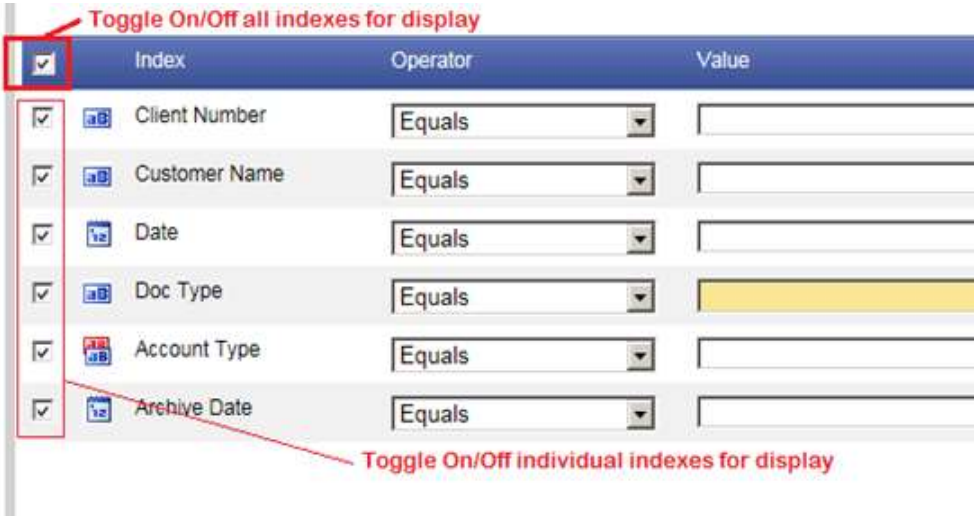


In the above example, when you conduct a search (by clicking the **Search** button) after reordering the indexes, the settings will persist for "All Classes".

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.

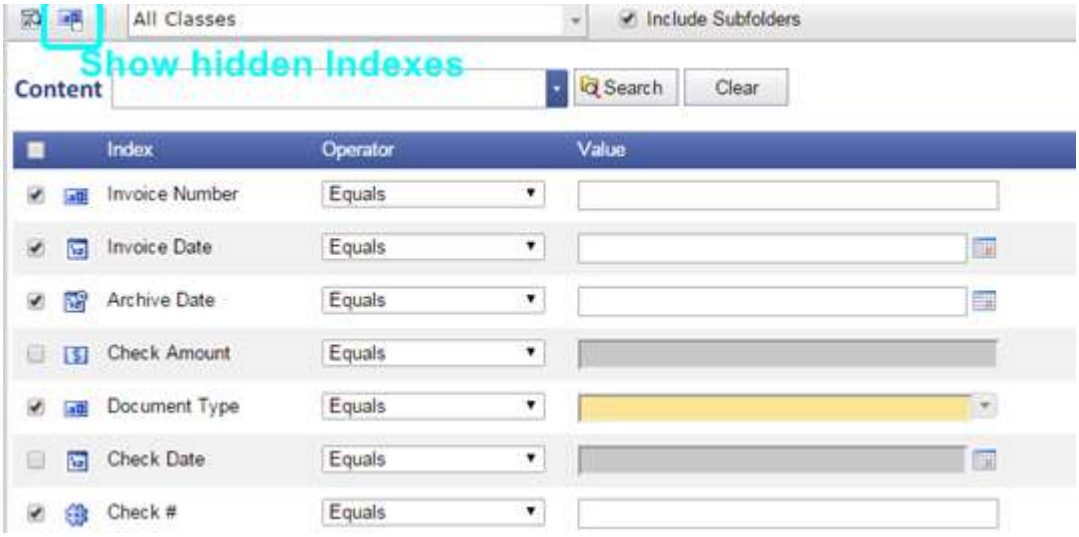


Hiding and Showing Search Indexes

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.

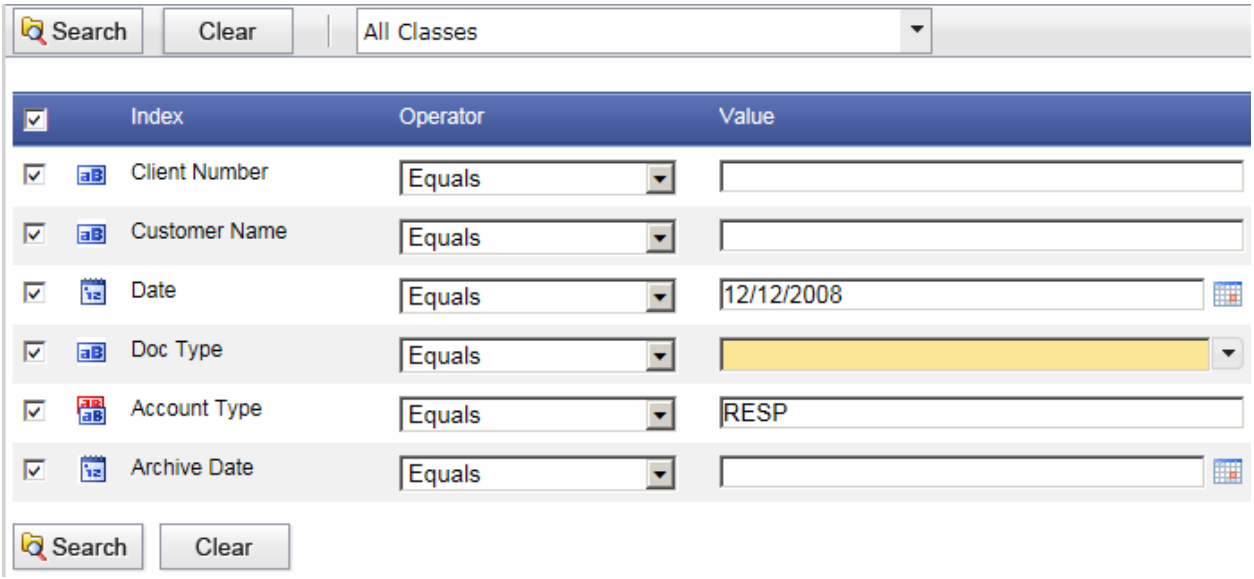


Conducting a Search

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

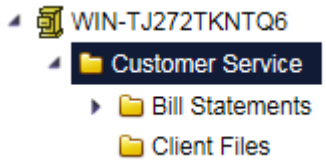


Sub-folder Searches

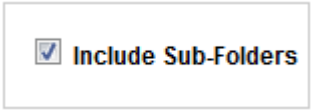
When conducting a sub-folder search, search options are only slightly different.

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.

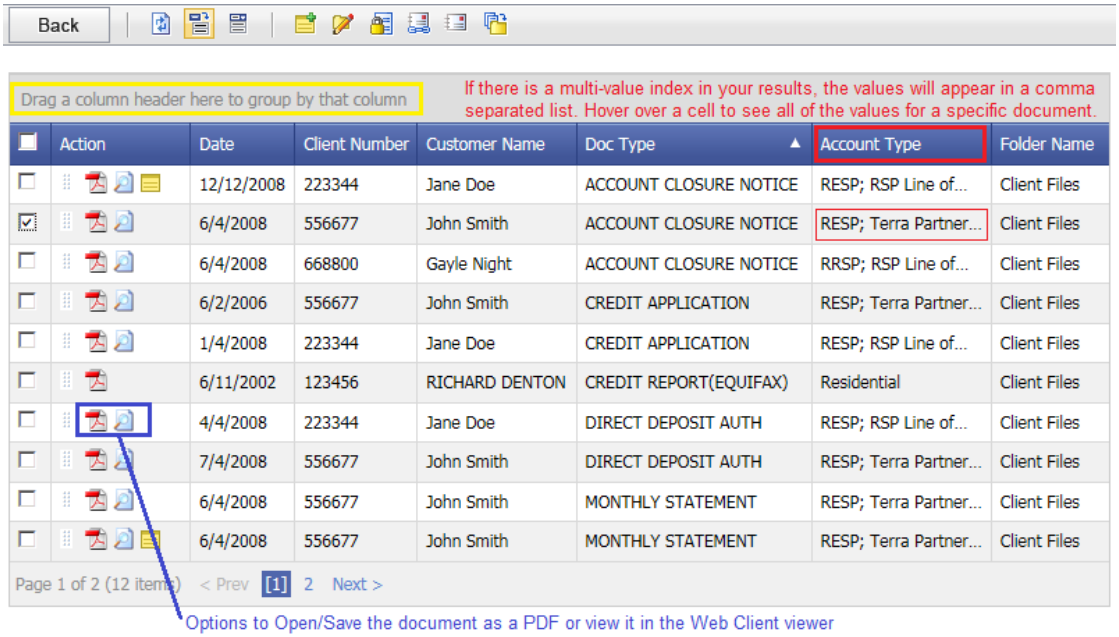
    From the section "The Index Search Pane"
    To conduct a search, follow these simple steps:
    1. Choose the comparison operator from the provided drop down for the index you wish to filter your results by.
    2. Enter or select the value in the *Value* edit box for the index you wish to filter your 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*.

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 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.

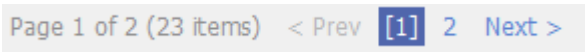
Click on the icon to view a Tiff or Text document in the embedded viewer. For detailed explanation about the embedded viewer, please refer to the 'Embedded Viewer' section.

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.

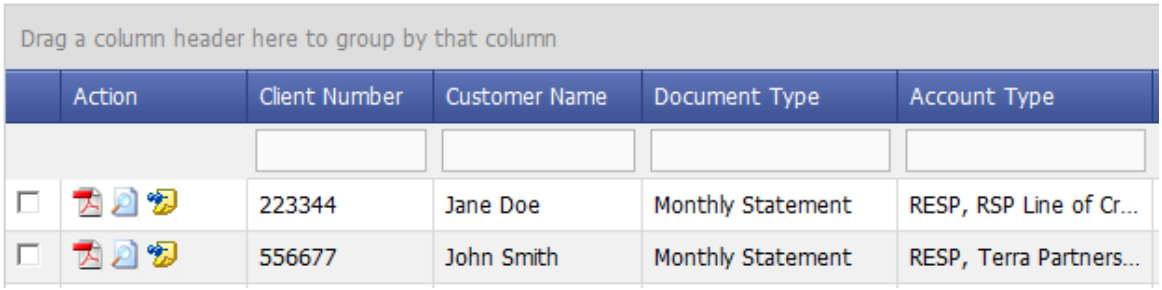
Click on the icon in order to view notes that may be associated with a document.

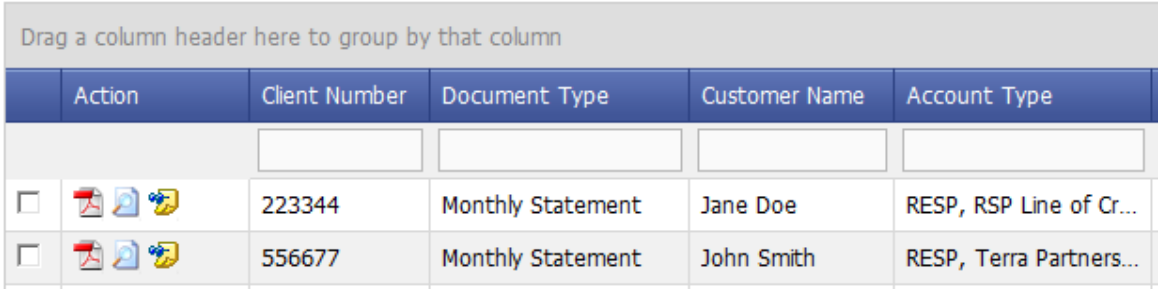
Document Status Bar
The status bar at the bottom of the grid will display how many results were returned from the search, and how many grid pages there are containing the total results. For example, in the below image, we can see a total of 23 documents were returned from the search, and they span 2 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

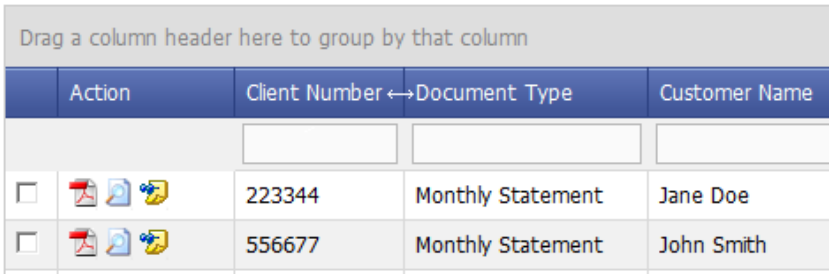
Reorder Index Columns
To reorder your index columns, simply click on and drag the column header to the desired location in the header row. In the below example you can see that "Document Type" starts in between the "Customer Name" and "Account Type" columns and is then moved to the right of "Client Number".





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 move 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.

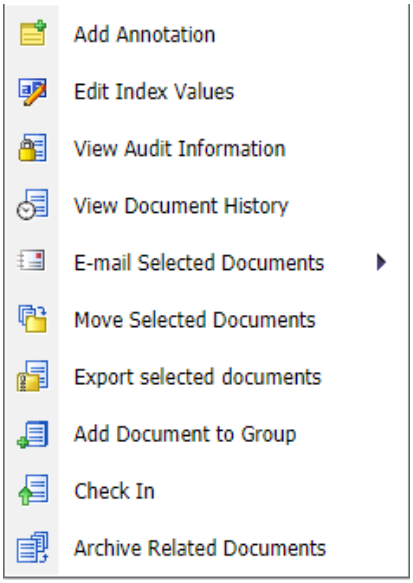


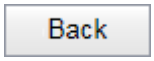
NOTE: Resizing index columns will persist for subsequent searches on the same folder/document class.

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 

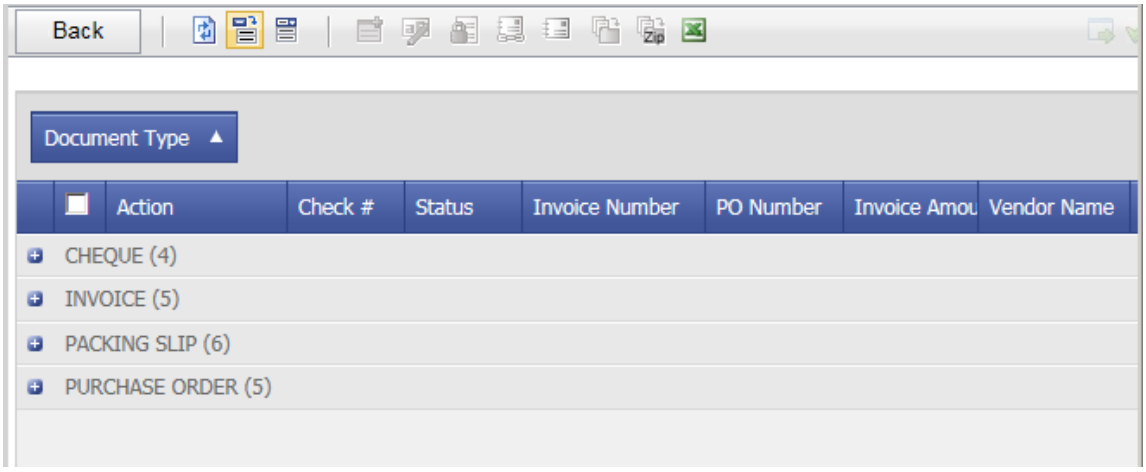
Click the *Back* button to return to the *Index Search* pane where your most recent search criteria will still persist for the same folder(s) being searched.

Refresh

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

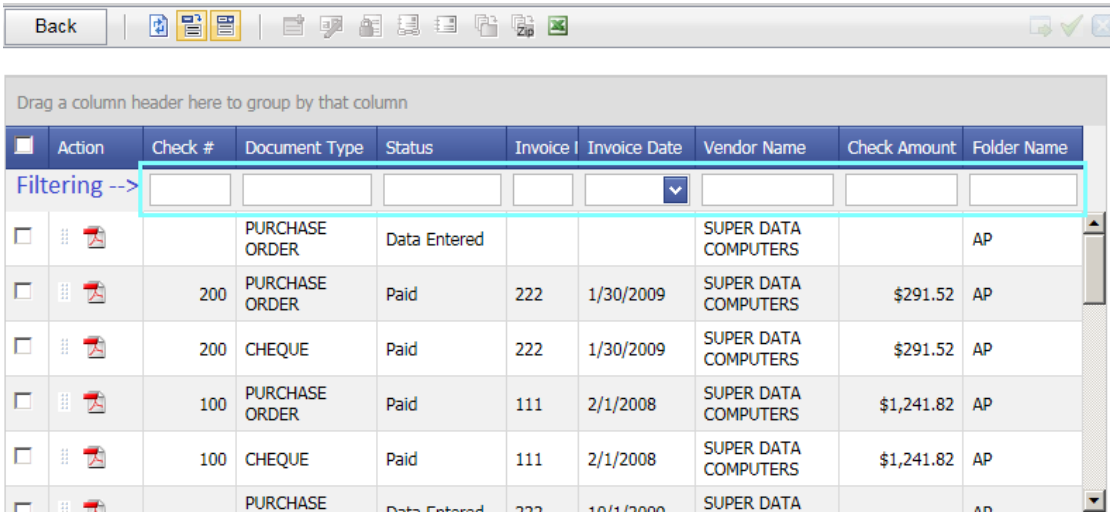
Enable/Disable Grouping

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.



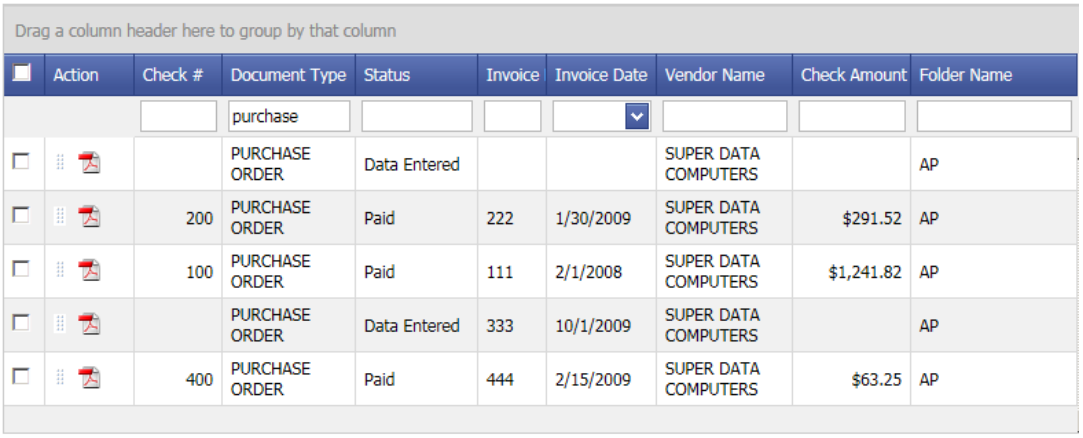
Enable/Disable Filtering

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



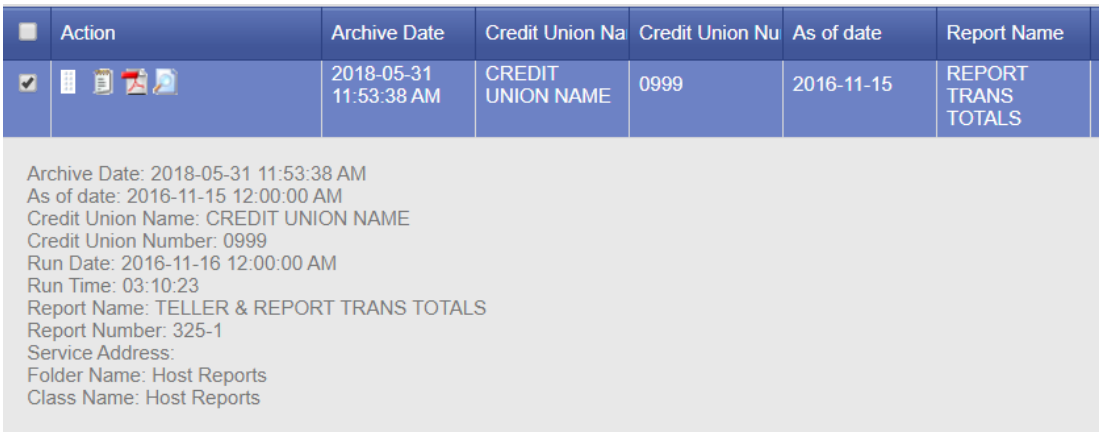
To filter search results, enter all or a portion of the index value you wish to filter by in the provided edit box(s). The results will filter automatically as the user enters a value.

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.



Show Index Summary

Displays the list of Indexes and values below the document within the Search Result Lists.



Expand all Groups
This works with Enable/Disable Grouping. You can Expand All groups or Collapse all Groups.

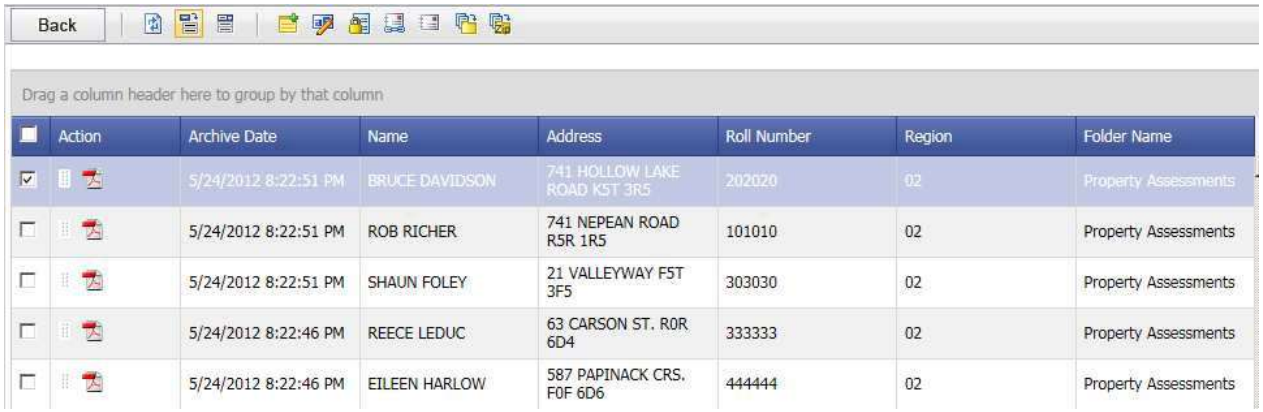
Here is an example of Expand All Groups.

Save as Report
By clicking on this icon, the entire search results list of index values will be exported to a XLSX file for import into Excel for your reconciliations or reporting needs. When you click this icon, you will be prompted to enter a name for the report after clicking OK a XLSX file is generated and sent to be downloaded by the web browser.

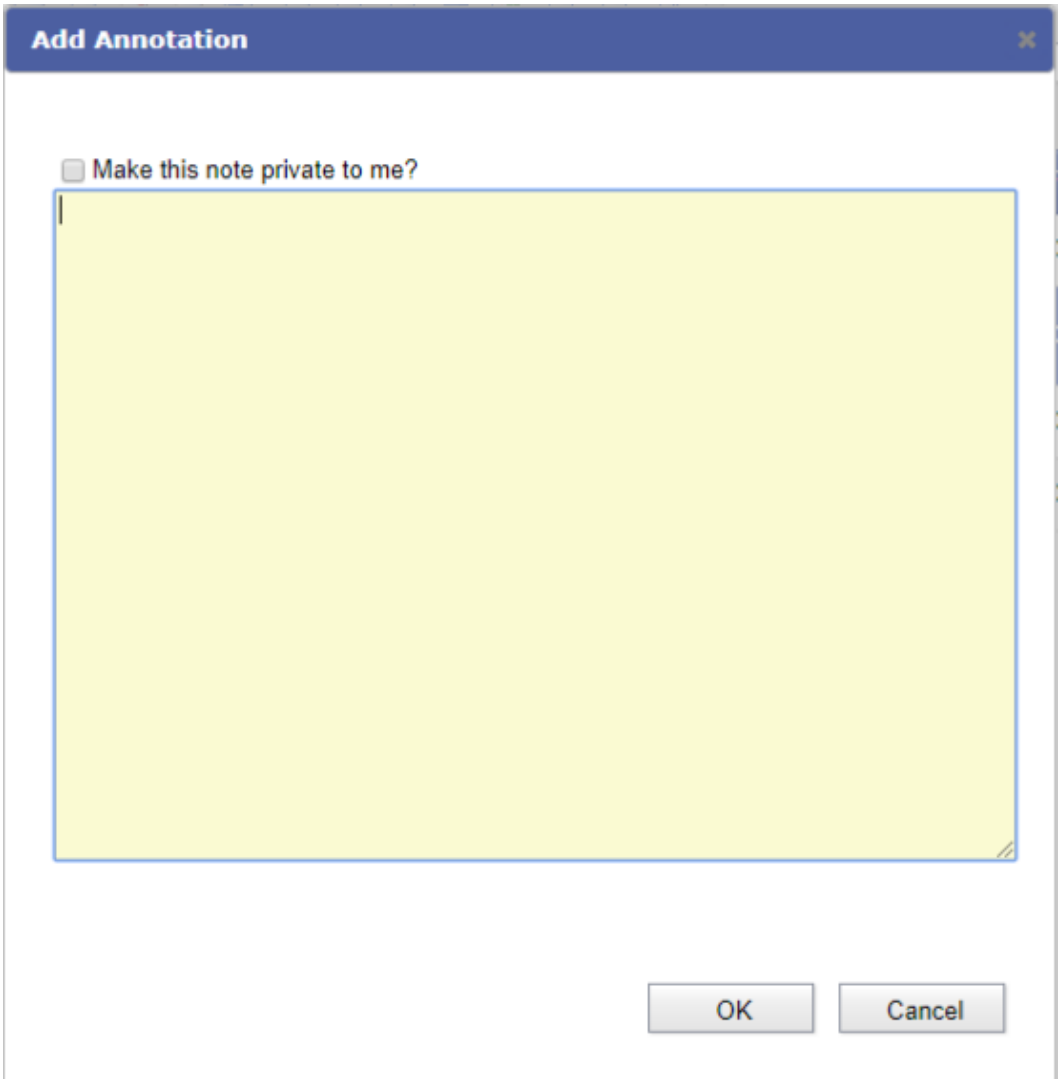
Create a Background Job for this Search Result
This feature allows you to create a Background Job for the Search Results.

NOTE: Feature requires Background Job Task permission enabled.

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.

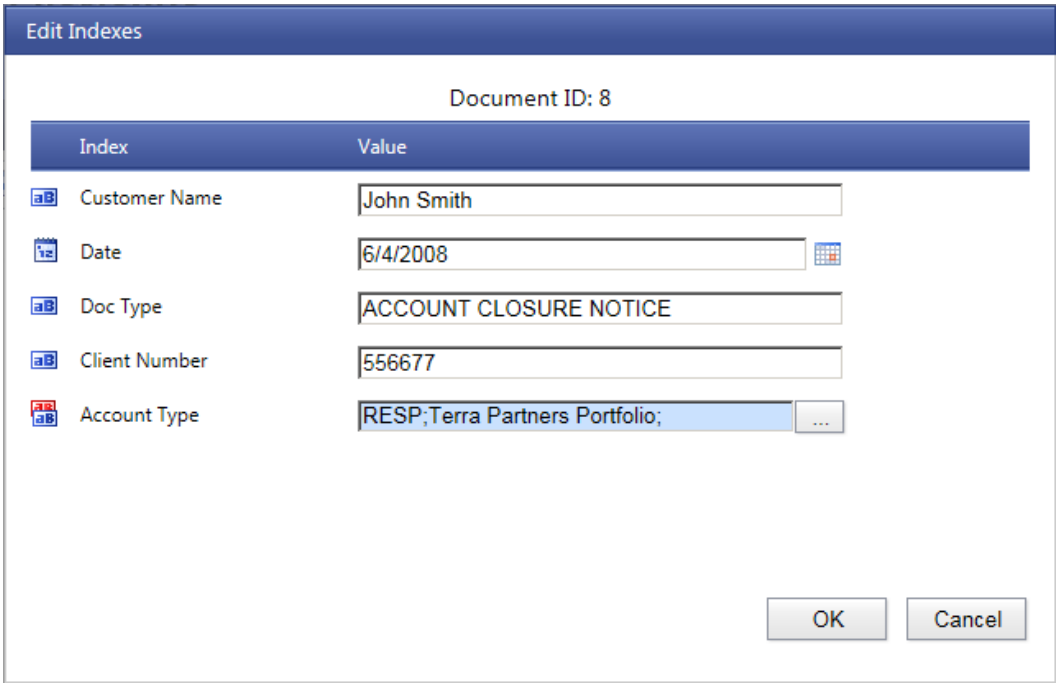


After you enter your note, click OK to save or Cancel to cancel the note. When adding an annotation, FileNexus will automatically stamp the username and system date and time on the note.

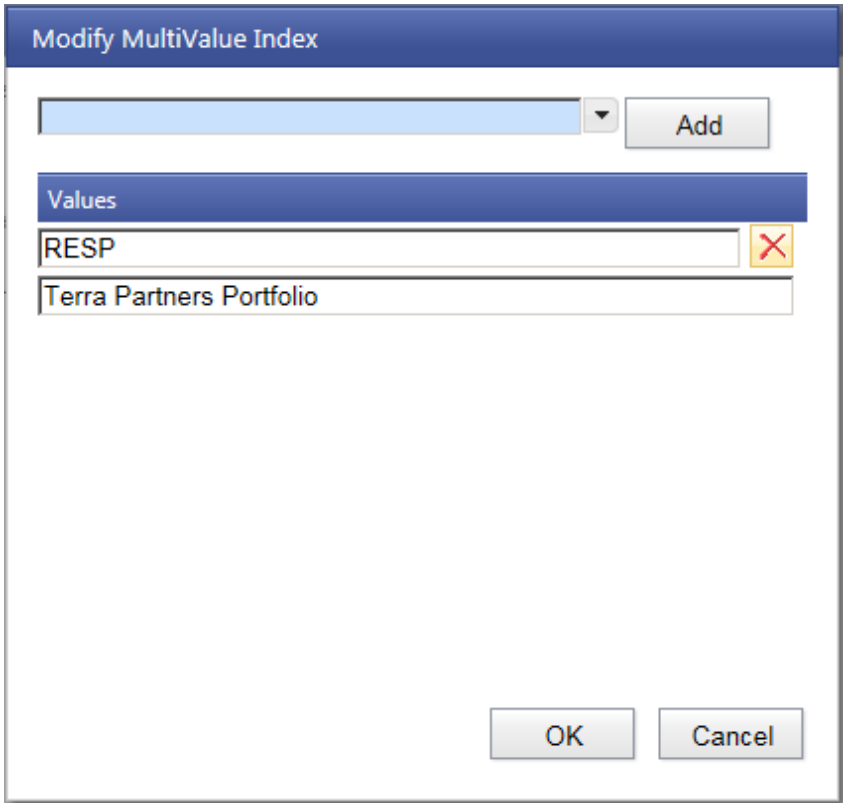
Edit Index Values

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.



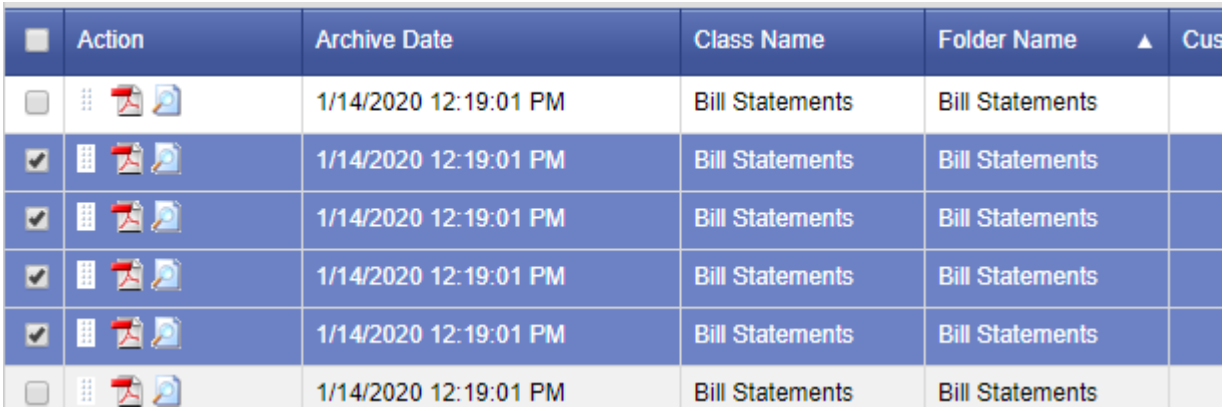
If you are editing a Multi-value index, click on the ellipses icon to open a Modify MultiValue Index window, like the one shown below.



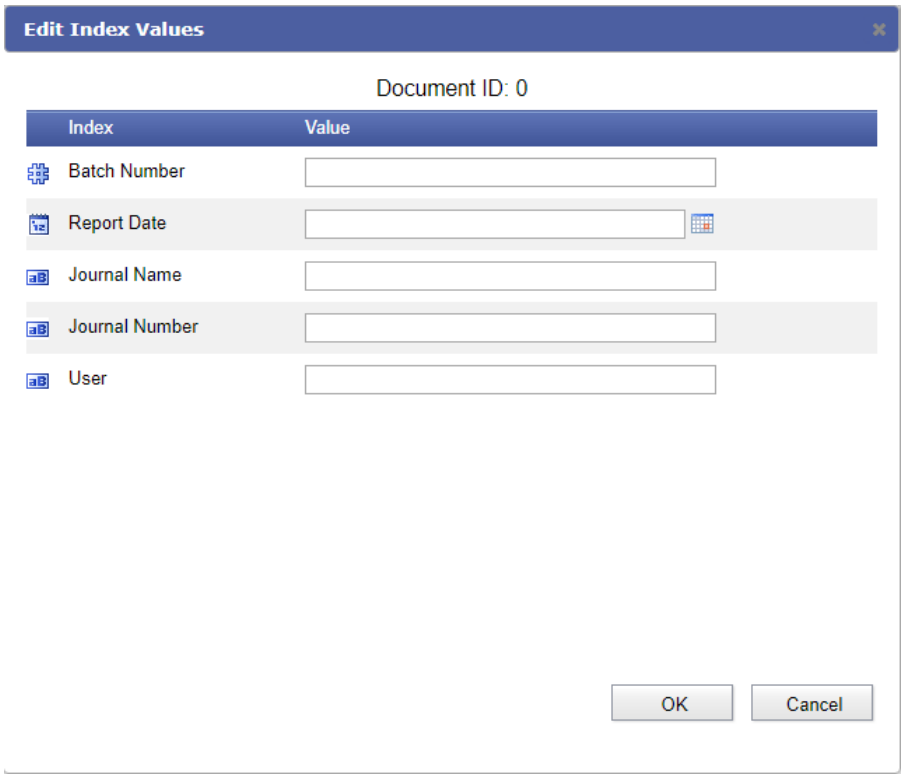
Key in new values in the blue highlighted box provided and click Add, or remove values by highlighting the value and clicking on the X icon. Hit OK to save your changes or Cancel to discard them.

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



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.

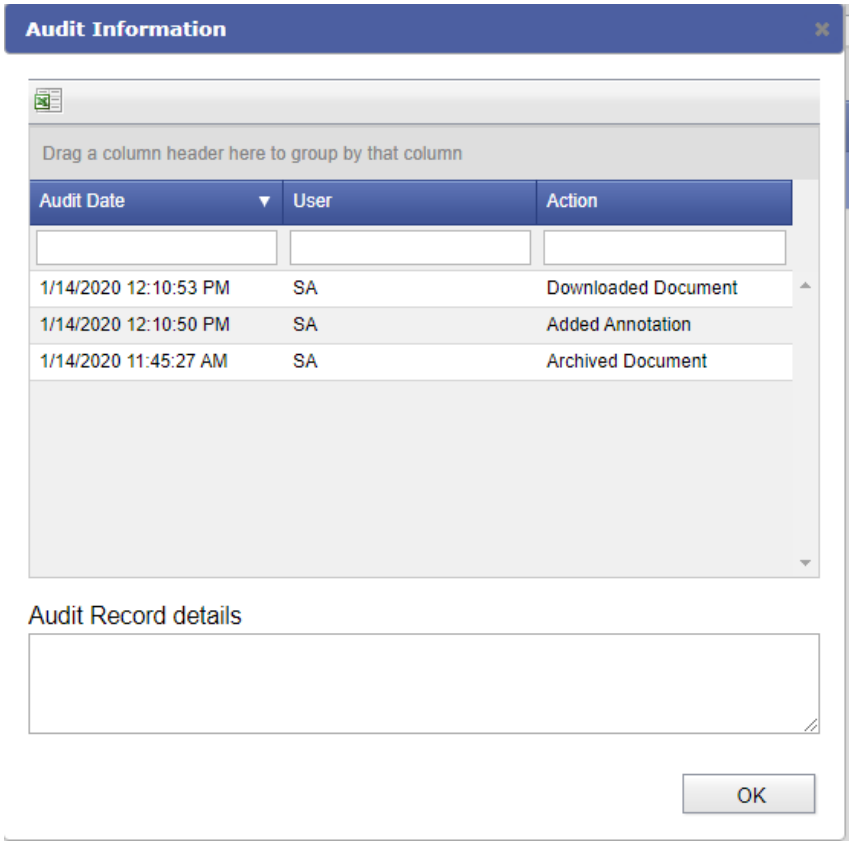


View Audit Information

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.

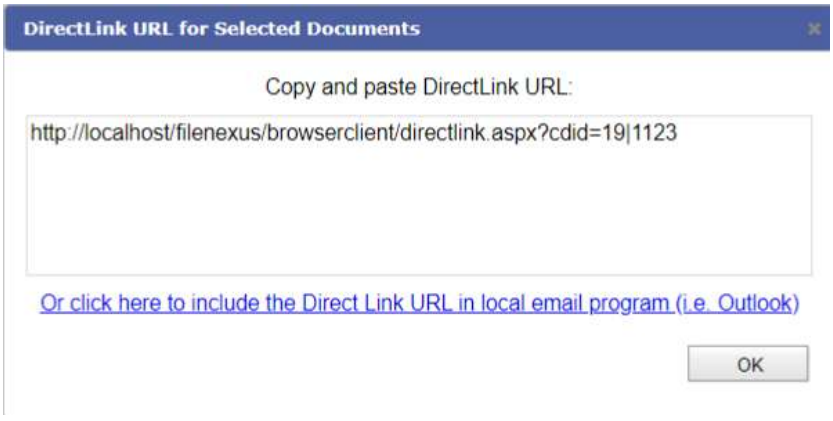
FileNexus automatically logs each instance a document has been viewed, had notes added/removed, emailed, downloaded, moved between folders, or managed in any way, as well as stamps the date time and user id that carried out the event. By highlighting an entry in the top pane of the Audit Log tab, any 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, a "DirectLink URL for Selected Documents" menu will appear.

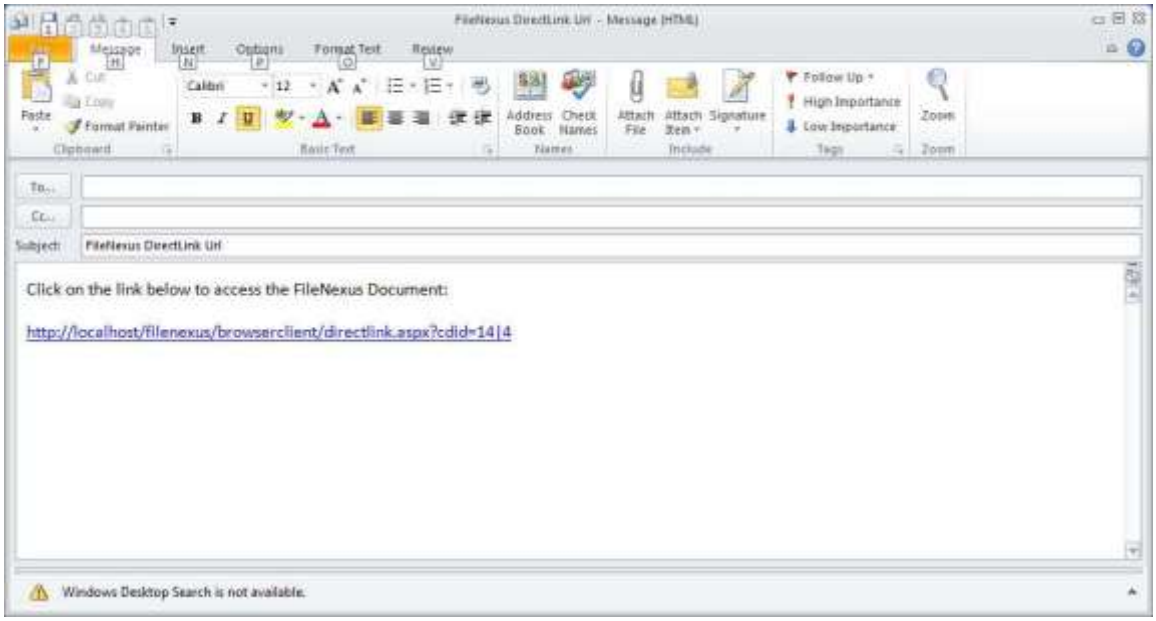


By clicking on the unlined text FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the link to this document in the body of the email. Only FileNexus users will be able to view the document.

This method for sending documents the following benefits and applications:

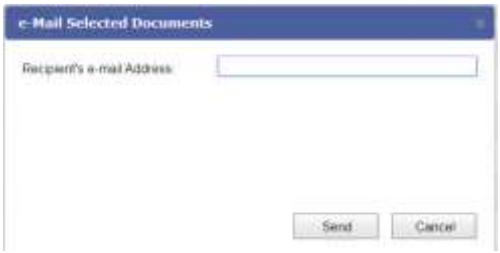
1. You can use documents links when you want to e-mail a document to someone in your organization who has access to FileNexus. Since the document link is only a pointer file it is very small and takes up very few network resources. This is much more efficient than mailing the actual document.

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.).



Email from Desktop
This another option that allows you to email the document. This option is only available from the right click menu within “E-mail Selected Documents”, and FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.).

NOTE: This option requires the Export Documents permission enabled.

Email from Server
This another option that allows you to email the document. This option is only available from the right click menu within “E-mail Selected Documents”, will prompt you to enter the recipient’s email address.

NOTE: This option requires FileNexus Server to be setup to send emails, and the Export Documents permission enabled.

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.

Merge Selected PDF Documents
This option allows you to merge selected documents into a single PDF document.

View Document History

This option will display all the document versions of the selected document.

Example:

Add Document to Group
This option allows documents to be grouped together. Documents that are grouped with have a icon beside the document. Clicking on the icon will show the other documents in the group.

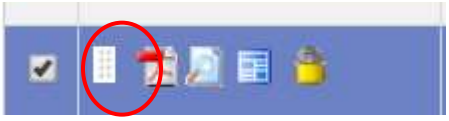
Add Document Task
This option allows a reminder to be set for a document. As well as assign a document(s) to another FileNexus user.

NOTE: This requires feature Task to be enabled, in the configuration settings

Check in a New Version
You can now have versioning on documents. This will allow you to create multiple version of the document. The most recent version will be displayed when viewing the document. You can View Document History to view the different versions.

Check Out This Document
This feature allows the document to be checked out. This means that no other user can check in a document to create a new version.

When checked out, the following Icon will appear beside the document.



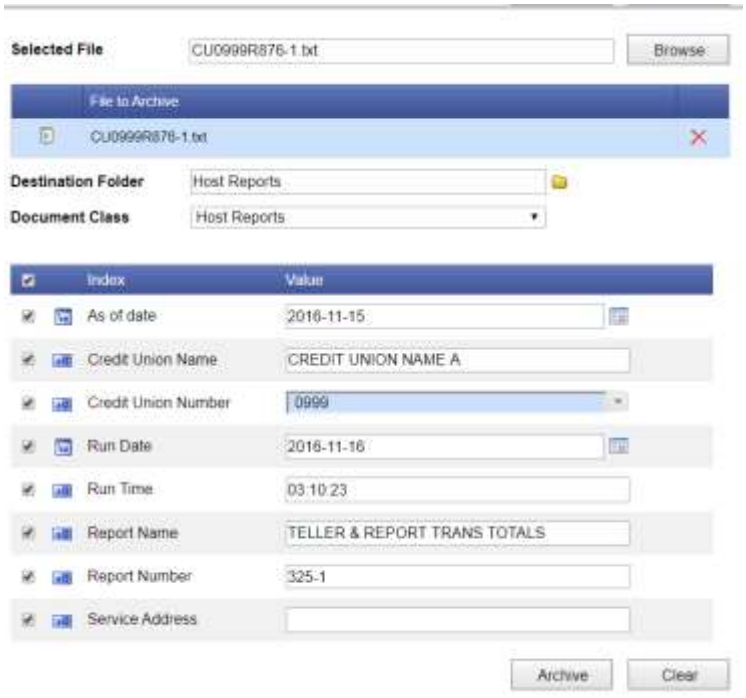
Archive Related Documents

This option allows you to archive a document using the same Document Class, Index field values and folder based on the document selected.

Example:

1. Perform a Document Search.
2. From the Search Result List, select a document.
3. Click the icon “Archive Related Documents”.

4. The Archiver screen will be displayed.
5. When you select the document you want to archive, it will auto-populate the Document Class, Folder and Index Values.

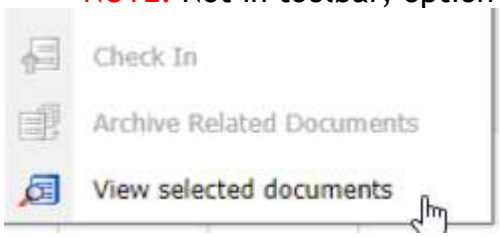


Create a Background Job for this Document
Very similar to "Background job for the Entire Search List", this feature allows you to create a Background Job for selected documents.

View Selected Documents

With 2 or more (up to 5) selected documents this feature is available and allows the simultaneous viewing of the selected documents for comparisons purposes.

NOTE: Not in toolbar, option only available when right clicking

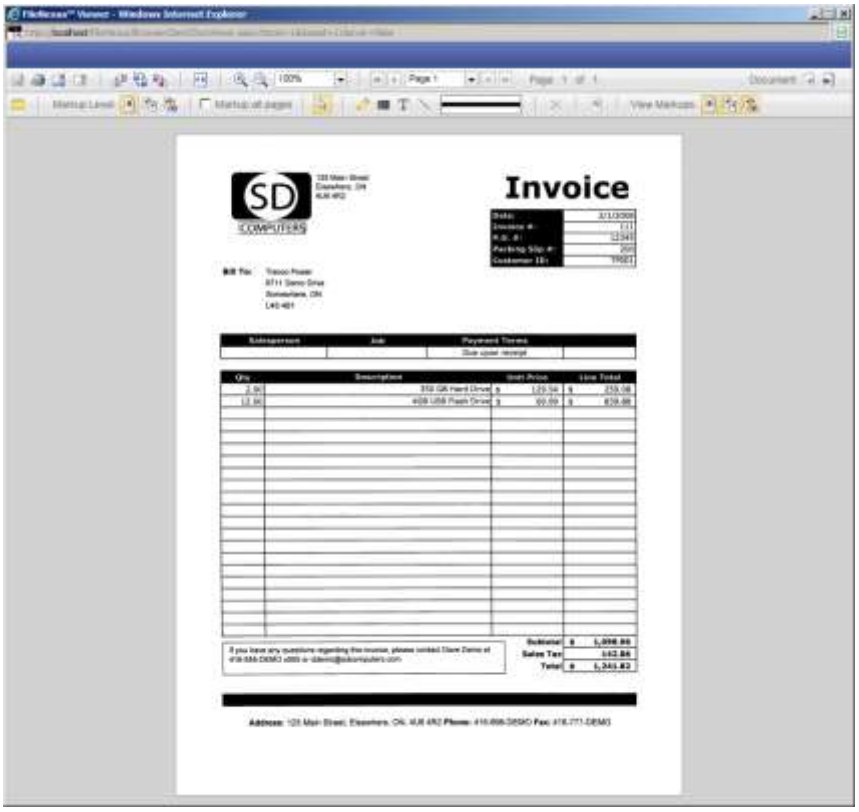


Custom Workflow Action Buttons

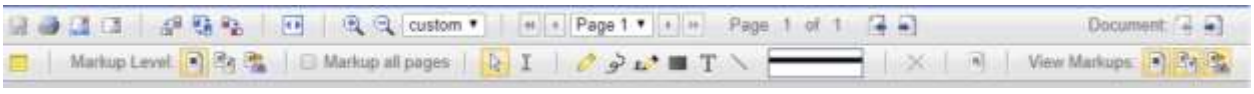
On the right hand side of the search results toolbar, you may see other custom buttons. These buttons are customized workflow action buttons based on the need of each department. In the below example, the workflow action buttons that are created are related to AP approval process. These options are also available when you right click a document that is applicable to workflow actions. For more information regarding workflow actions please refer to the Workflow within FileNexus section of this document.

Viewing Documents with DocViewer

DocViewer is the FileNexus embedded viewer, and allows the viewing of documents. Please note that not all document types can be displayed with DocViewer. The native application's icon in the Action column will only be displayed, allowing the user to open or save the document those instances.



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

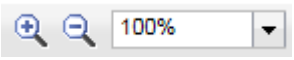
This option allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the Search Results Grid that you wish to move.

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

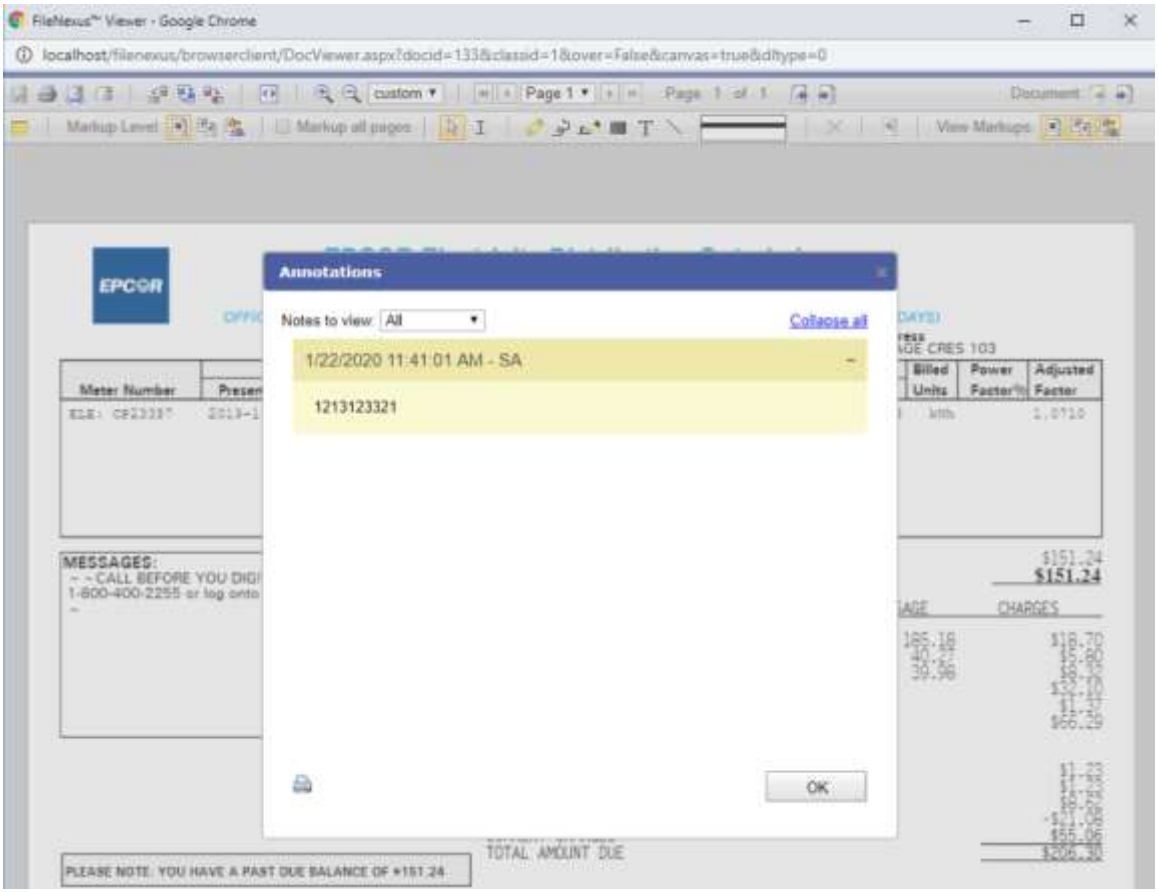
This option allows you to scroll through the different pages of the document or jump to a certain page by selecting the page number from the page drop down.

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 I con, 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.

Text Selector

The Text Selector icon allows you to select text from a document where text is selectable, such as text documents.

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

This option (Filled Rectangle Markup) 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.

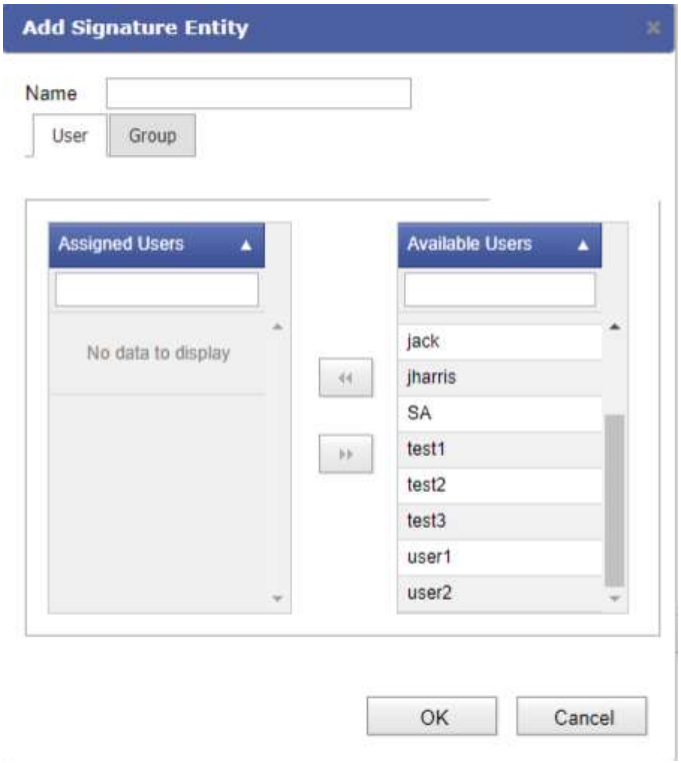
Free Draw Markup

The Free Draw Markup icon allows you to manually draw lines on a document. To complete the drawing double-click anywhere on the document.

Signature Markup

The Signature Markup adds a signature box on a document. The signature box allows the document to be signed, initialed and dated by a user. and once signed is permanent on the document. To add a User Signature on a document, first open the document with Doc Viewer . Click on the Signature Tool icon , then select where you would like the signature placed and left click. The Signatures Properties will appear.

Enter a description, and select an Entity. The Entity is the person(s) or group(s) of people that will be signing the document. As an Entity is required and there is not one, one will need to be added. When clicking on Add the Add Signature Entity will appear.



Enter a Name for the Entity and assign a user(s) or a Group(s) in the Group Tab to the signature, and click ok. The Signature Type can be changed depending on need. If the signature box is intended for a signature then no change is needed.

After clicking OK, the signature field will appear on the document.

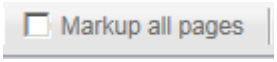
For the changes to be applied click save , after saving the signature box can be signed. To sign, double-click on the signature box, then click save to apply the changes.

Line Markup

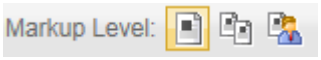
The line markup tool is helpful if you want to draw a link between two or more items on a document. Click on the Line Markup icon and left-click and drag you mouse from point A to point B on the current document to "draw" a line. After you have drawn a line on the document, you can resize, move, or delete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

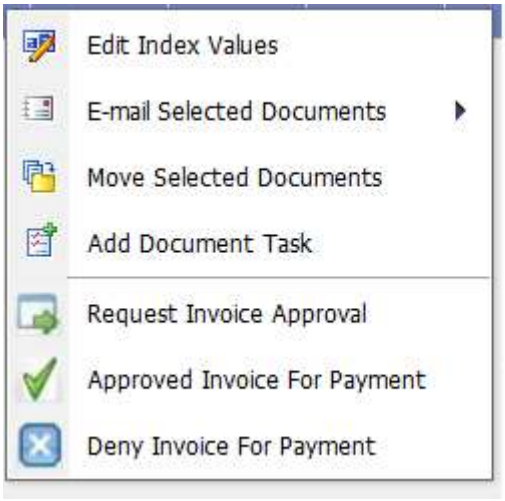
Workflow within FileNexus

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 please contact Loris Customer Support.

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.
Users can also manually add tasks to their task list and view and manage them from this screen.

Managing Tasks

Users can access their tasks from the Tasks menu. Next to Tasks there will be a number. This indicates the number of tasks the user has waiting, and will update periodically (default is 30 seconds, please see the Workflow Tab section in Users Settings to update the interval). The Tasks section is divided in to My Task and Manage Tasks.

My Tasks Tab

Task found within the My Task Tab are assigned to the user and not marked as Finished.

Priority of Task
Clicking on the icon the priority will change. Blue is low, Yellow is medium and Red is high.

View in Doc Viewer
Clicking on the icon the Doc Viewer will launched and display the document associated to the task (Please Viewing Documents with Doc Viewer for more information).

View in Search Results
Clicking on the icon the Search Results view will load showing the document associated to the task (Please see Search Results Toolbar for more information on the search view).

Edit Task
Clicking on the icon the tasked can be edited.

Processing Task
Clicking on the icon, changes the status of the task to Processing.

Finish Task
Clicking on the icon, changes the status of the task to Finished.

Manage Tasks Tab

Tasks found within the Manage Task Tab are tasks added by the user of the account. By expanding a task one can see the status of a task assigned and comments of the task from the assignee.

View in Doc Viewer

Clicking on the icon the Doc Viewer will launched and display the document associated to the task (Please Viewing Documents with Doc Viewer for more information).

Assign Task to Users and Groups
Clicking on the icon, additional users and/or groups can be added to the task.

Edit Task
Clicking on the icon the tasked can be edited.

Remove Task
Clicking on the icon the tasked can be removed.

Edit Task Comment
Clicking on the icon in the expanded section the task comment can be edited.

Remove User
Clicking on the icon next to the user name will remove the user from the task.

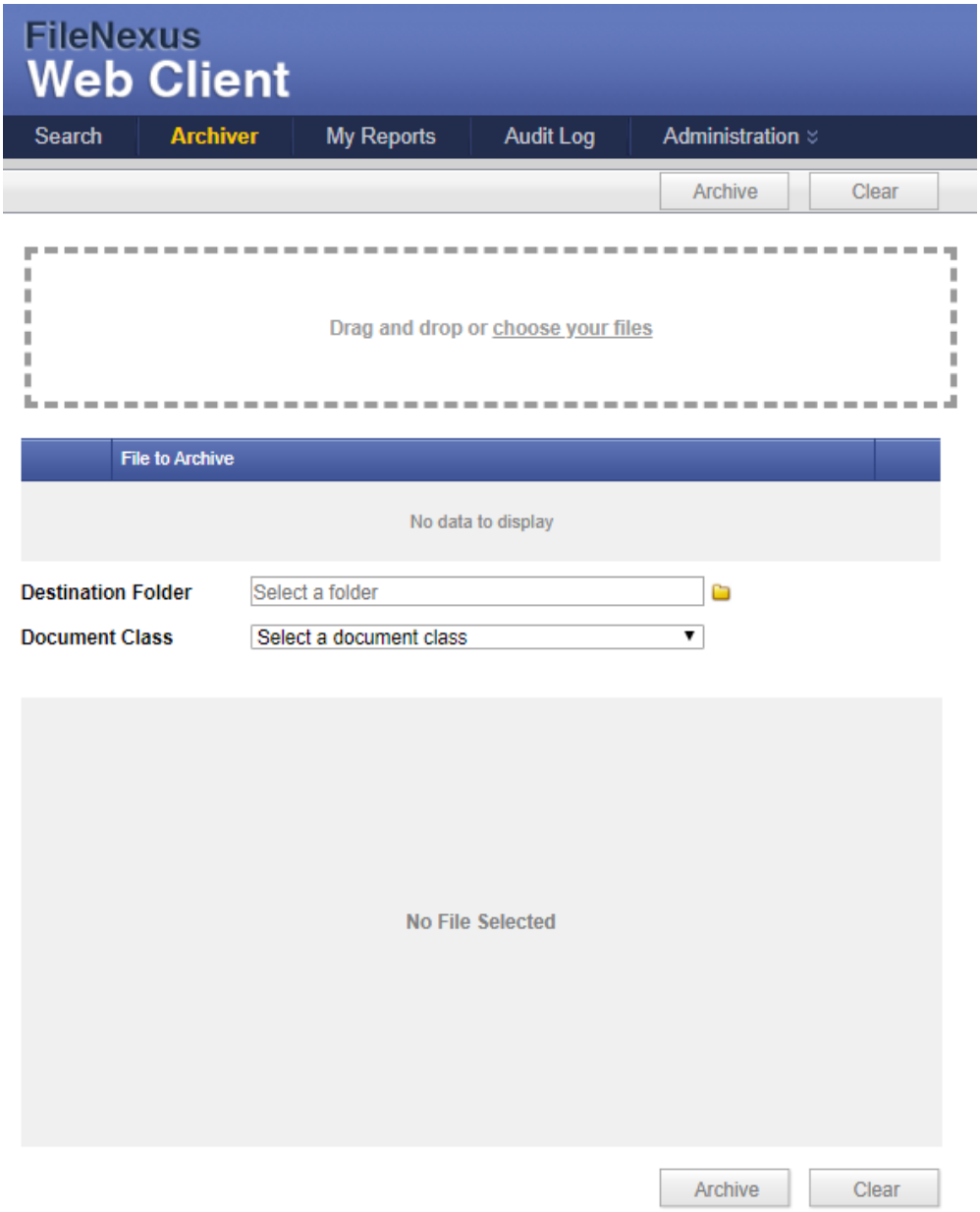
Reassign Task
Clicking on the icon user assigned to the task can be changed to another user.

Archiving Documents

Within the FileNexus web client users can archive documents to FileNexus using the **Archiver** menu selection. There are three modes that can be setup for archiving in the FileNexus web client. These modes are Upload, Automatic and Virtual.

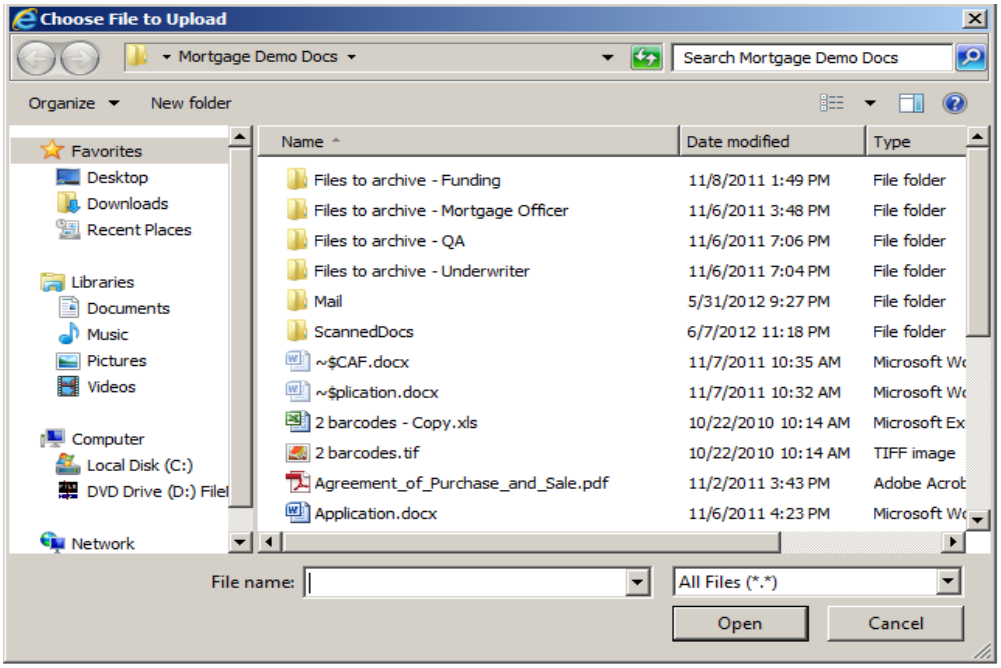
Upload Mode

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



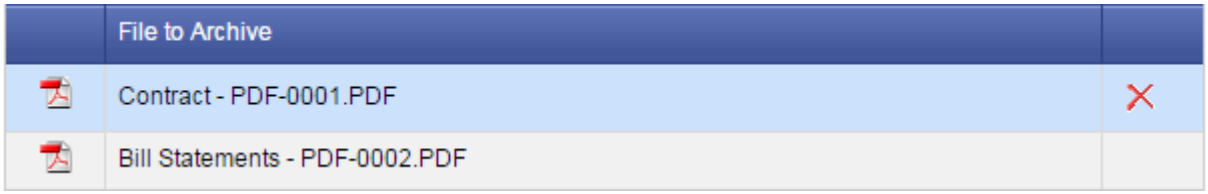
Browse

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



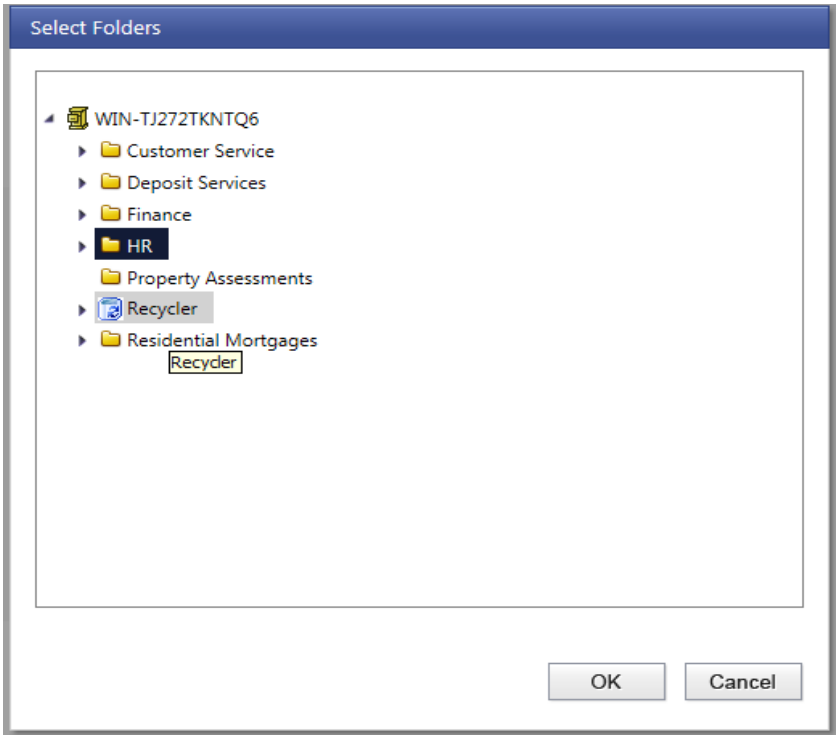
Files to Archive

You will be able to view all the files waiting to be archived. Click on the file name to continue archiving the file or click the button.



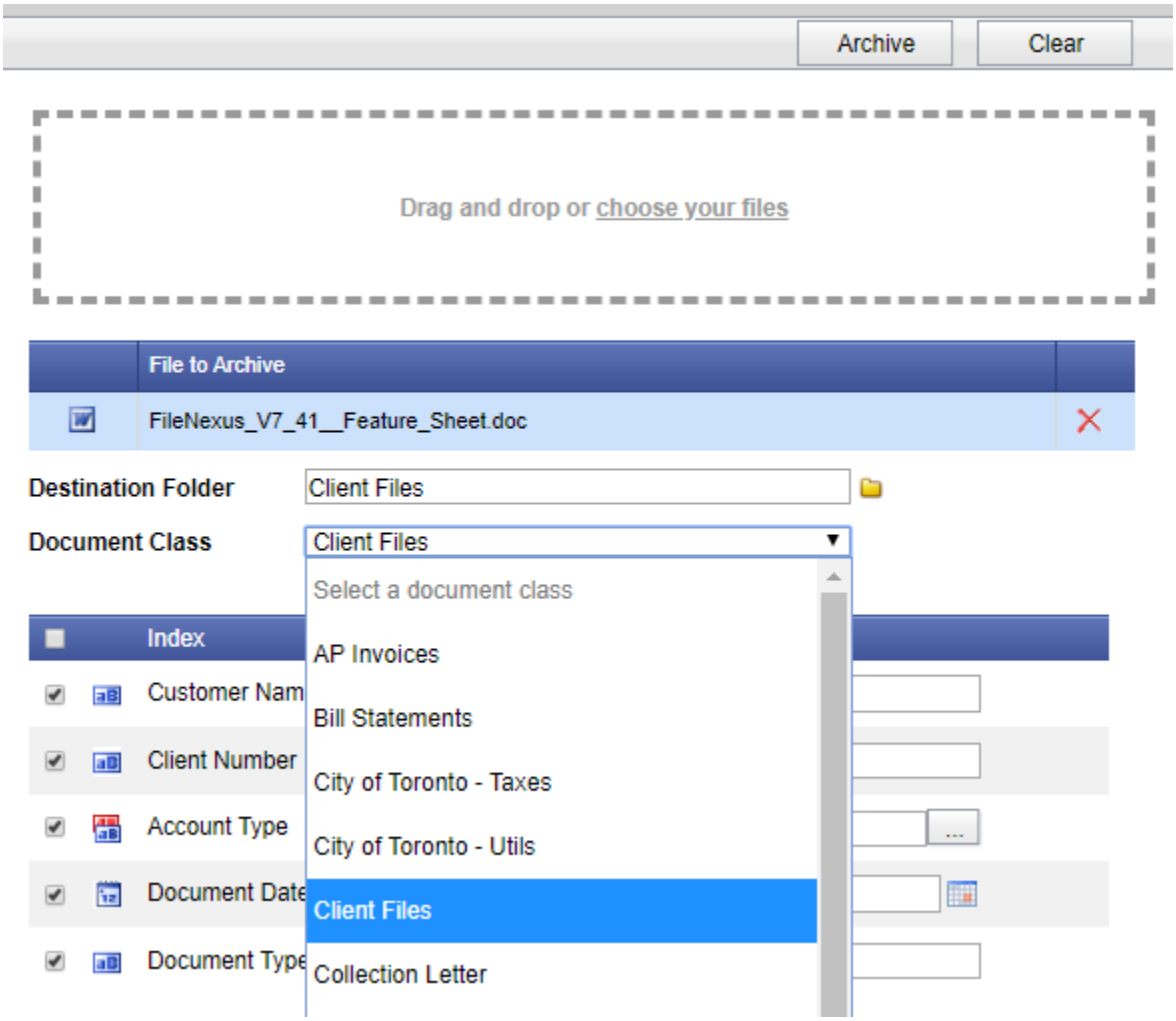
Destination Folder

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

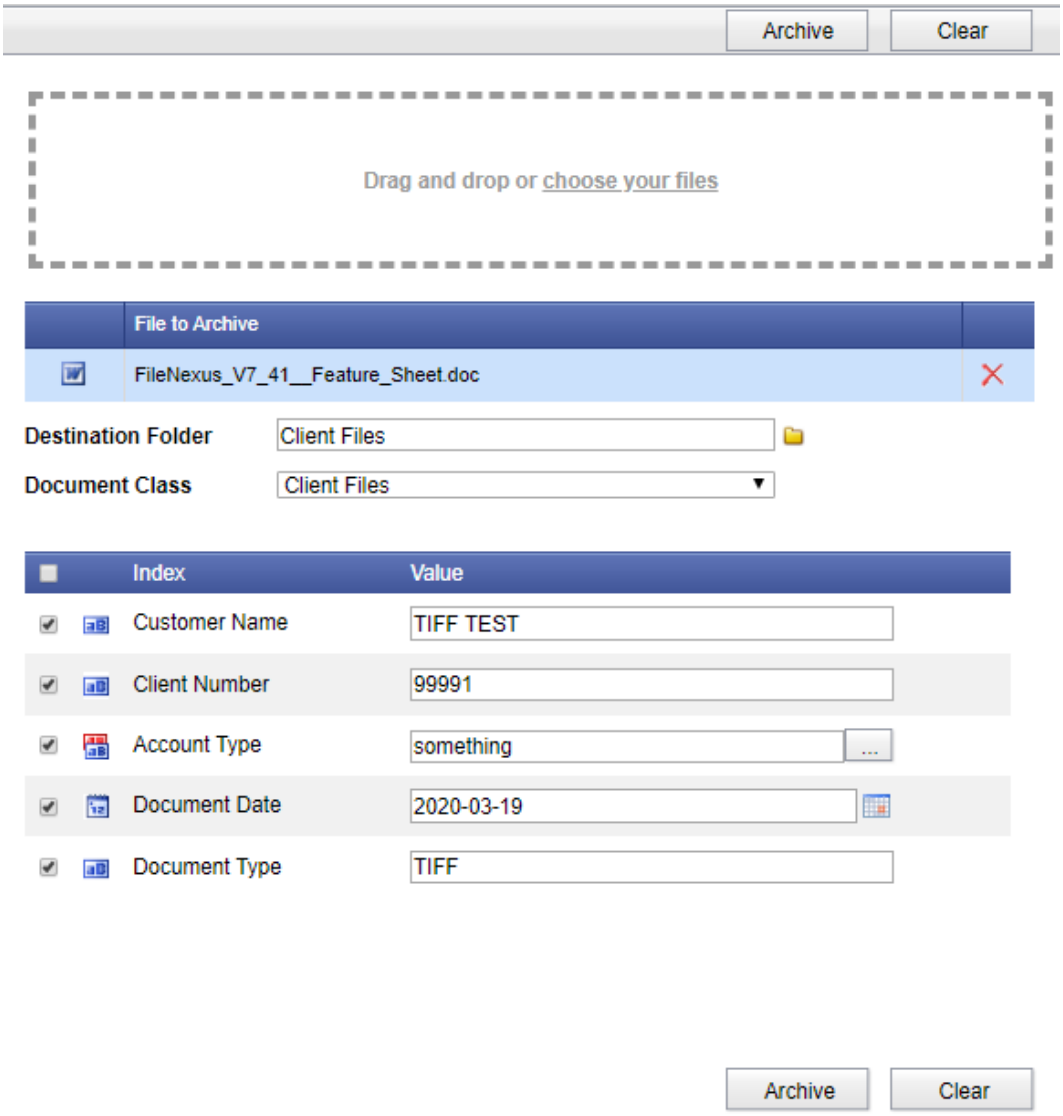


Document Class

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.



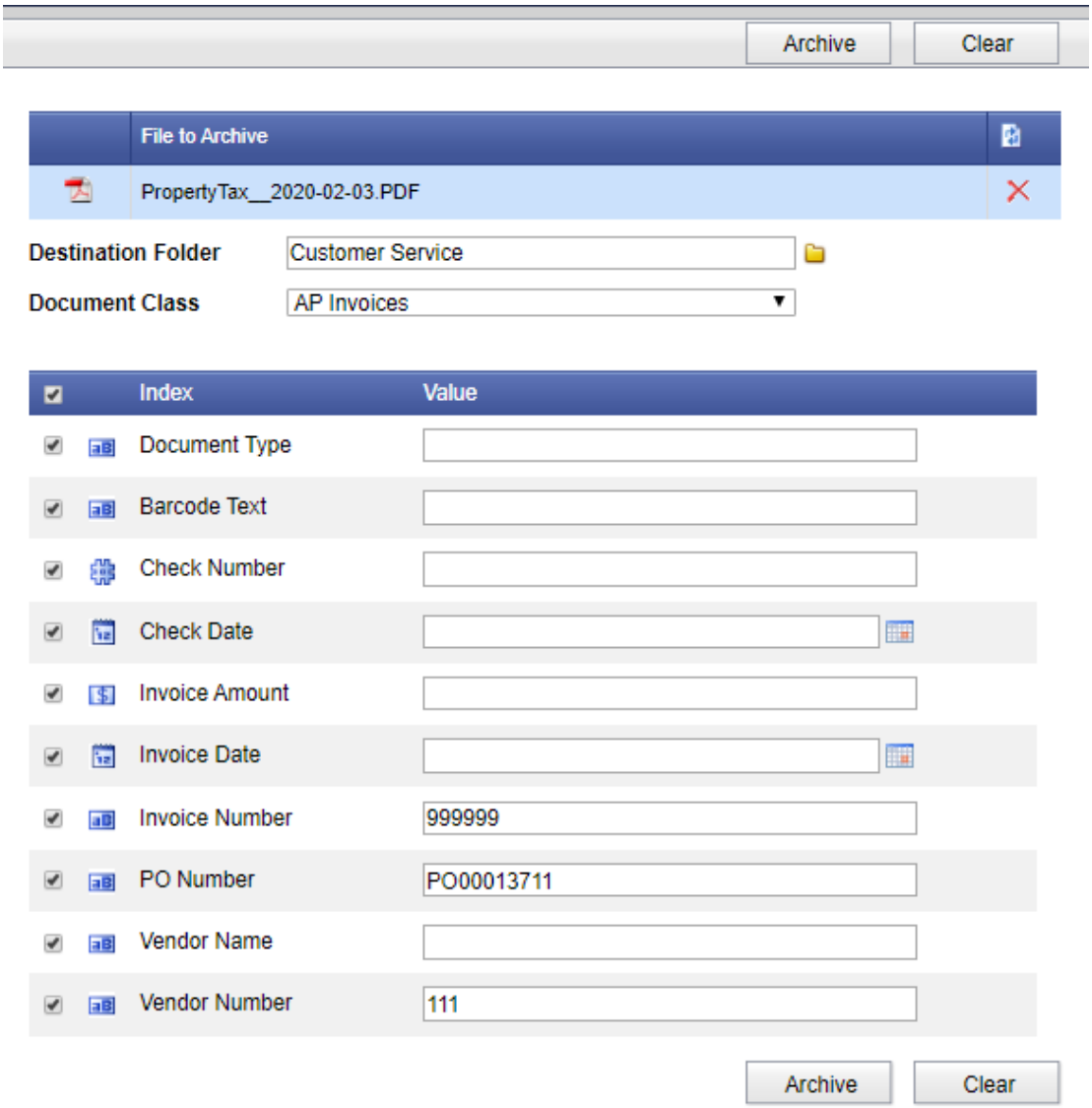
Once a document class has been selected, you will be prompted to enter the associated index values.



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

Automatic Mode

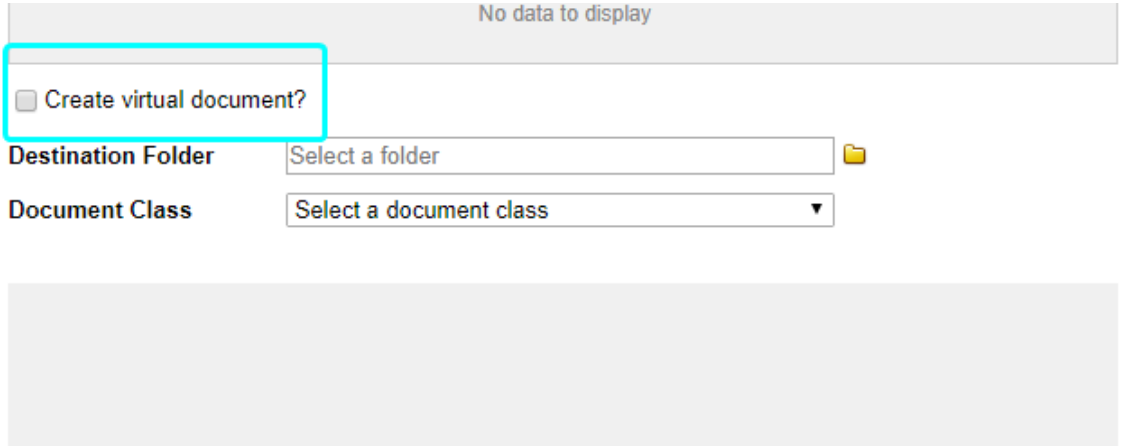
Automatic mode will search for all documents in a specified folder (set by your FileNexus Administrator) on the server (Example: C:\FileNexus\autoarchiver). Once the user clicks on the FileNexus Archiver, all the files that are saved in the above specified folder show up in the web archiver screen.



Same as the Upload mode, the files to be archived are displayed in the web archiver screen. You can select each file and go through the indexing process as you do with the upload mode. If there are files that do not need to be archived, you can click the file and remove it from the list.

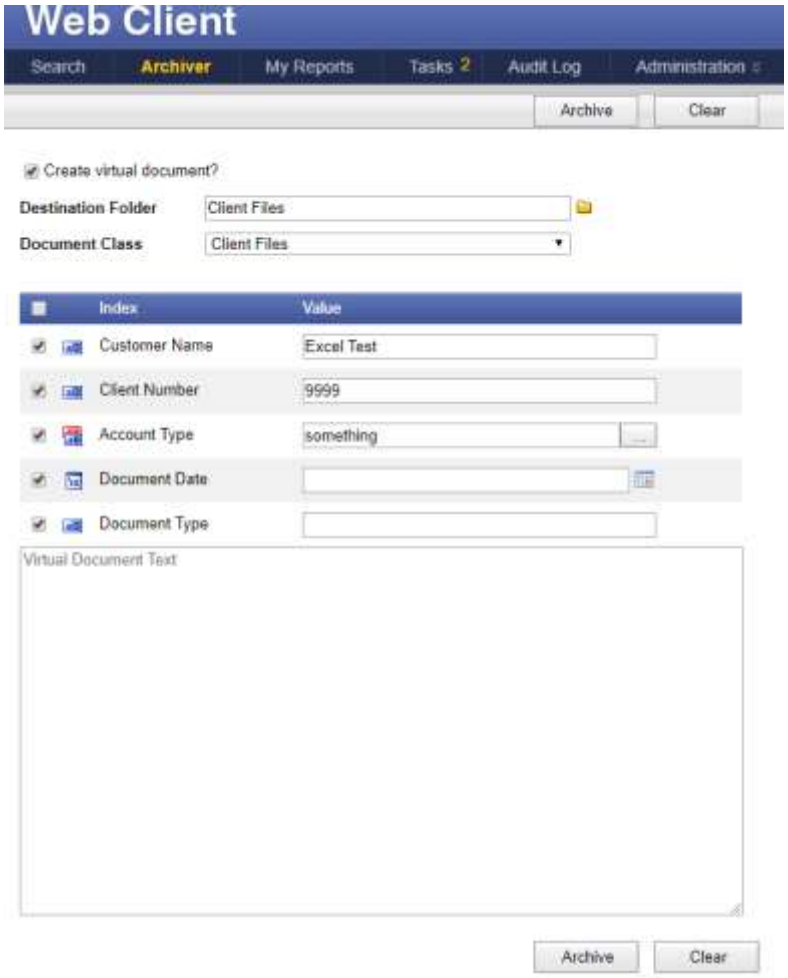
Upload Virtual Document

In both Upload Mode and Automatic there is a quick way to create and add a new document to FileNexus. Instead of archiving a physical file, you can now archive a virtual document (in which case FileNexus will automatically create a text file for you and populate it with the data that you enter in the archival



screen).

Click on Archiver and check the Create virtual document box.



Select a Destination Folder and Document Class, fill in your indexes, and enter the text for the document, then clicking the Archive button to archive your document.

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

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.

My Signatures

To access the signatures screen, click on your user name from the top right hand and select the My Signatures option.

The following Settings window will appear.

NOTE: Please refer to User Administration for the editing of the First Name and Last Name fields.

Generate Signature Tab
Provides a preview of the First Name and Last Name of the signature, with a selected font.

Draw Signature Tab
A signature can be drawn in the box and used as the signature in documents.

Upload Signature Tab
A signature can be uploaded and used as the signature in documents

Signature History Tab
Shows the signature type (Generate – Generated, Draw – Freedraw, Upload – Image) to be used and whether printed name is to be displayed.

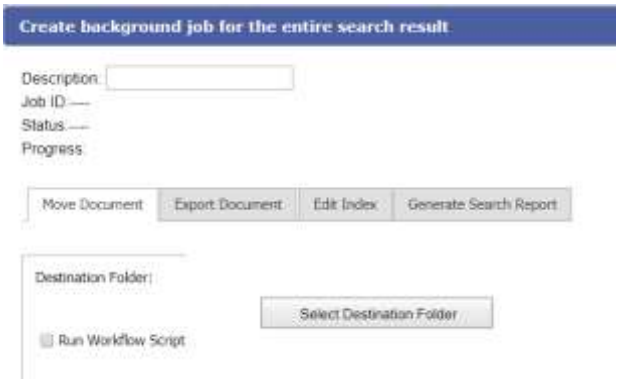
My Background Job

You can setup a job to run in the background. This will allow you to continue to work without affecting the Web Client. The My Background Job allows you the status of all your Jobs. Please note, in order for your Background Job to be executed, the FileNexus Task: Background Job must be enabled and scheduled to run.

To create a Background Job, click on the “Create Background job for the Entire Search List”

1. Click on the Icon to create a Background Job.

2. You can set different Background Jobs. Such as: Move Document, Export Document, Edit Index or Generate Search Reports.



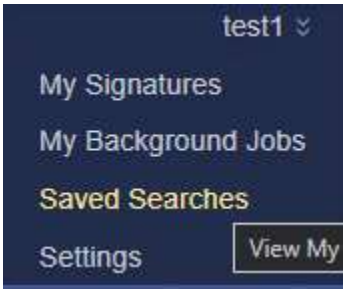
To access the settings screen, click on your user name from the top right hand and select the *My Background Jobs* option.

A list of your Background Jobs will be displayed.

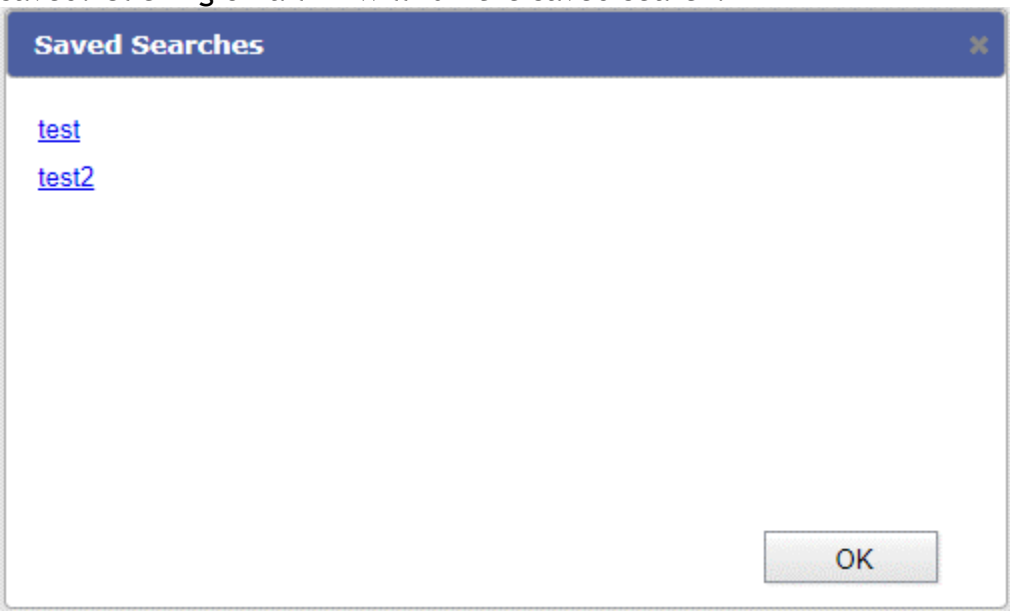
Background jobs will be displayed for up to a week and will be automatically removed.

Saved Searches

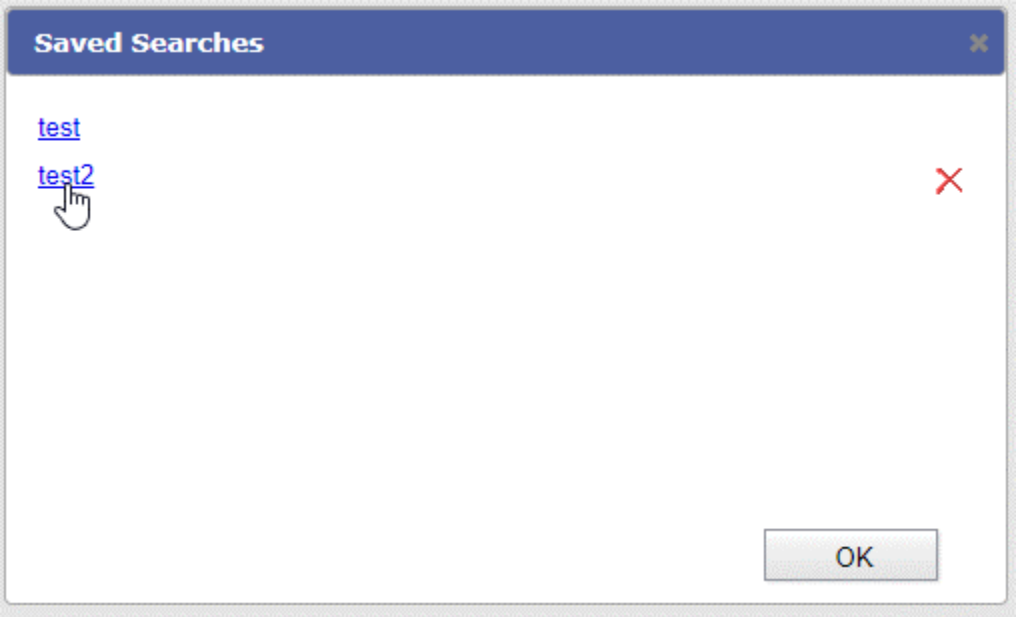
Searches that have been saved can be accessed here.



A Saved Searches window will appear displaying all searches that have been saved. Clicking on a link will run the saved search.

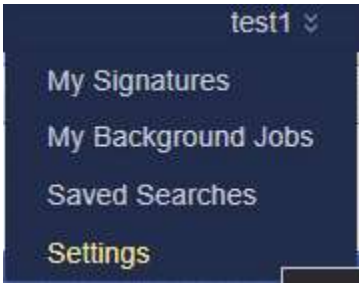


To remove a Saved Search, search click on the ✕ next to the name of the search. The ✕ can be seen when hovering over the name of search. Once the ✕ is clicked the Saved Search will be removed.


Saved Searches
test
test2
OK

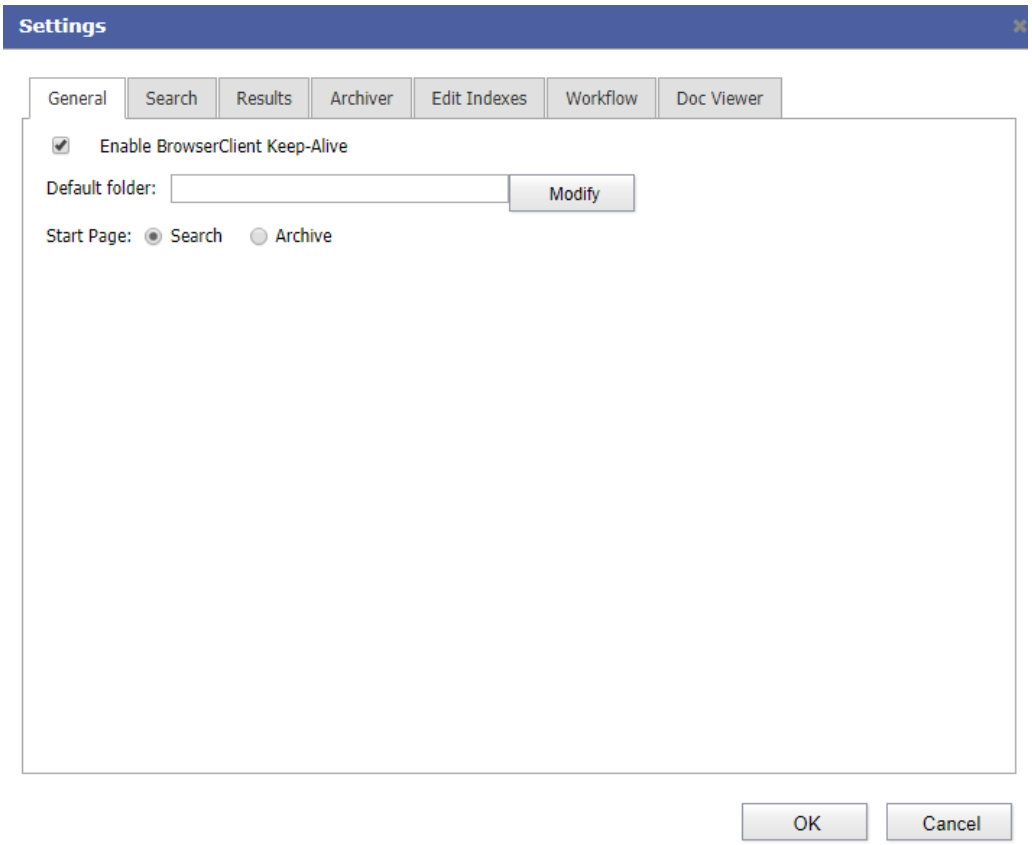
User Settings

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.

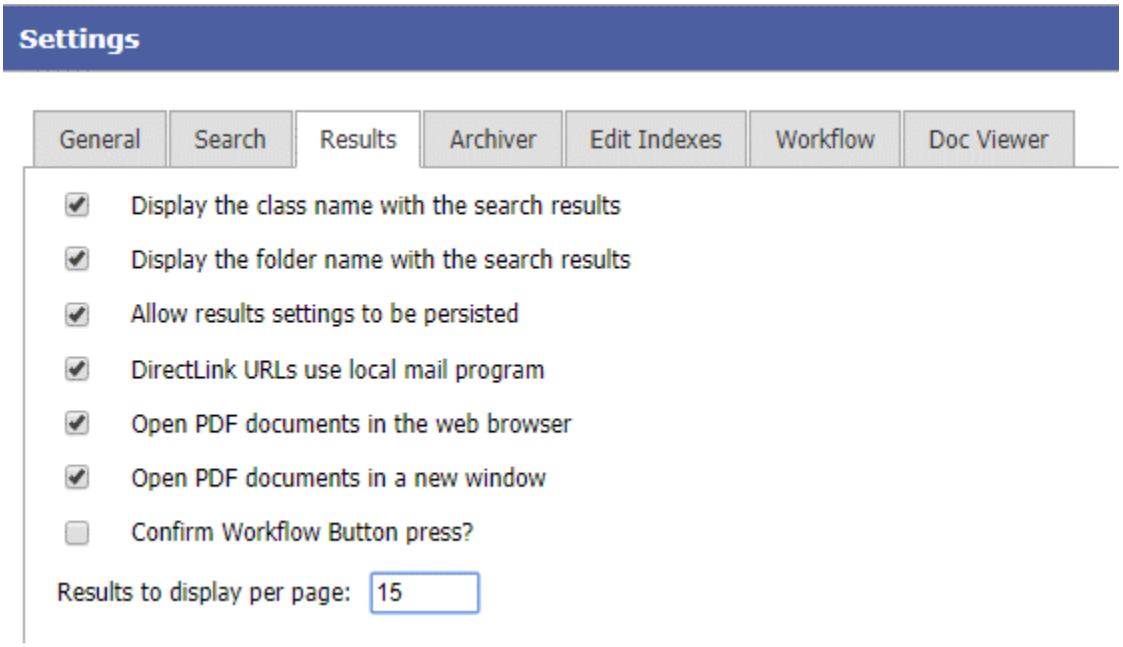
Allow search index values to be persisted
By default, this option is checked ON. This means that FileNexus will track up to 5 of a user's previous search criteria in the Index Search Value edit boxes or drop downs. Additionally, the previous search criteria used for an index on a Document Class will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

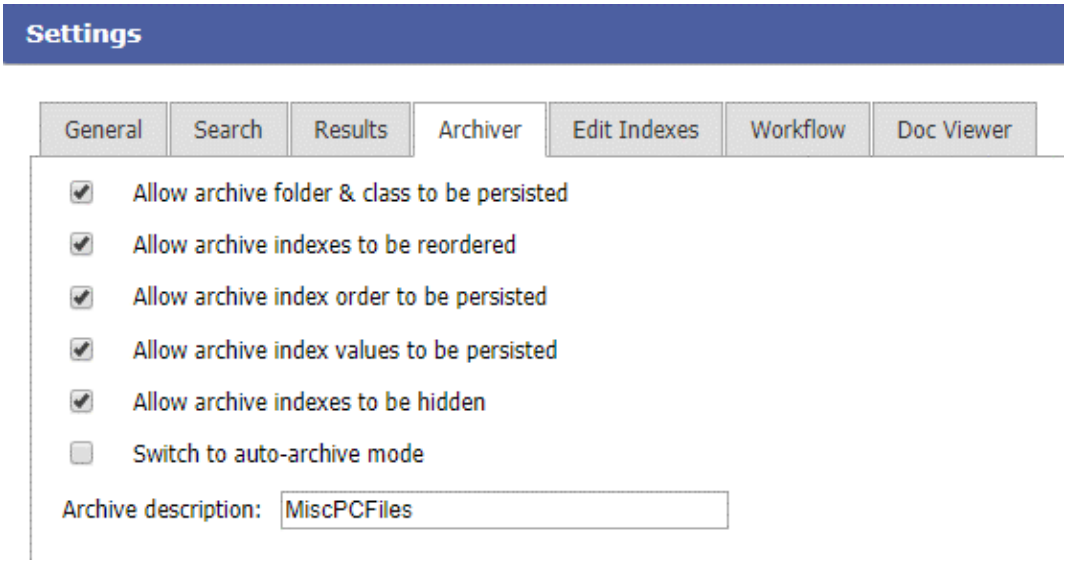
Open PDF documents in a new window
When this option is enabled, PDF documents will open in a new browser window.

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 indexes to be reordered
This option allows you to change the order of indexes that are displayed in the archiver screen.

Allow archive index order to be persisted
This option allows you to save the order of indexes that are displayed in the web archiver screen. If the default order of indexes is modified, having this option turned on, enables you to save this change.

Allow archive index values 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.

Allow archive indexes to be hidden
This option allows you to hide indexes that are not used during the archive process.

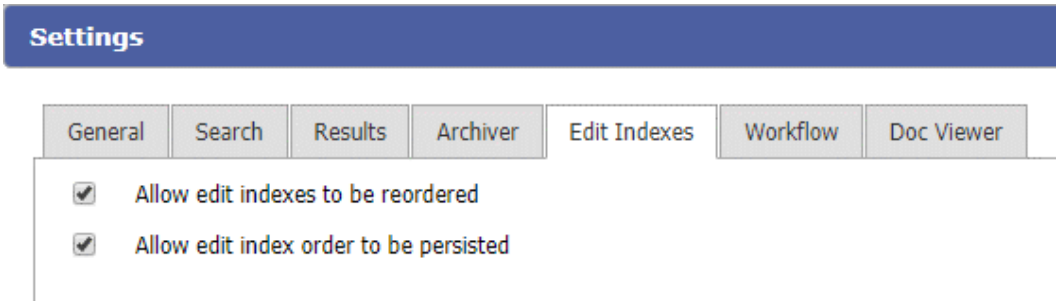
Switch to auto-archive mode
This option allows you to enable/disable the auto-archive mode. To configure the auto-archive mode, contact your FileNexus Administrator.

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.

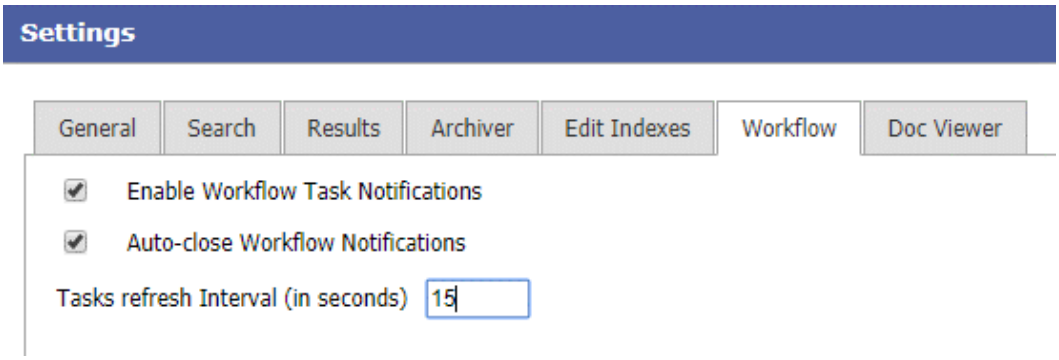


Allow edit indexes to be reordered
By checking ON this option, users with the rights to edit indexes for archived documents may reorder the indexes for easier value input.

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.



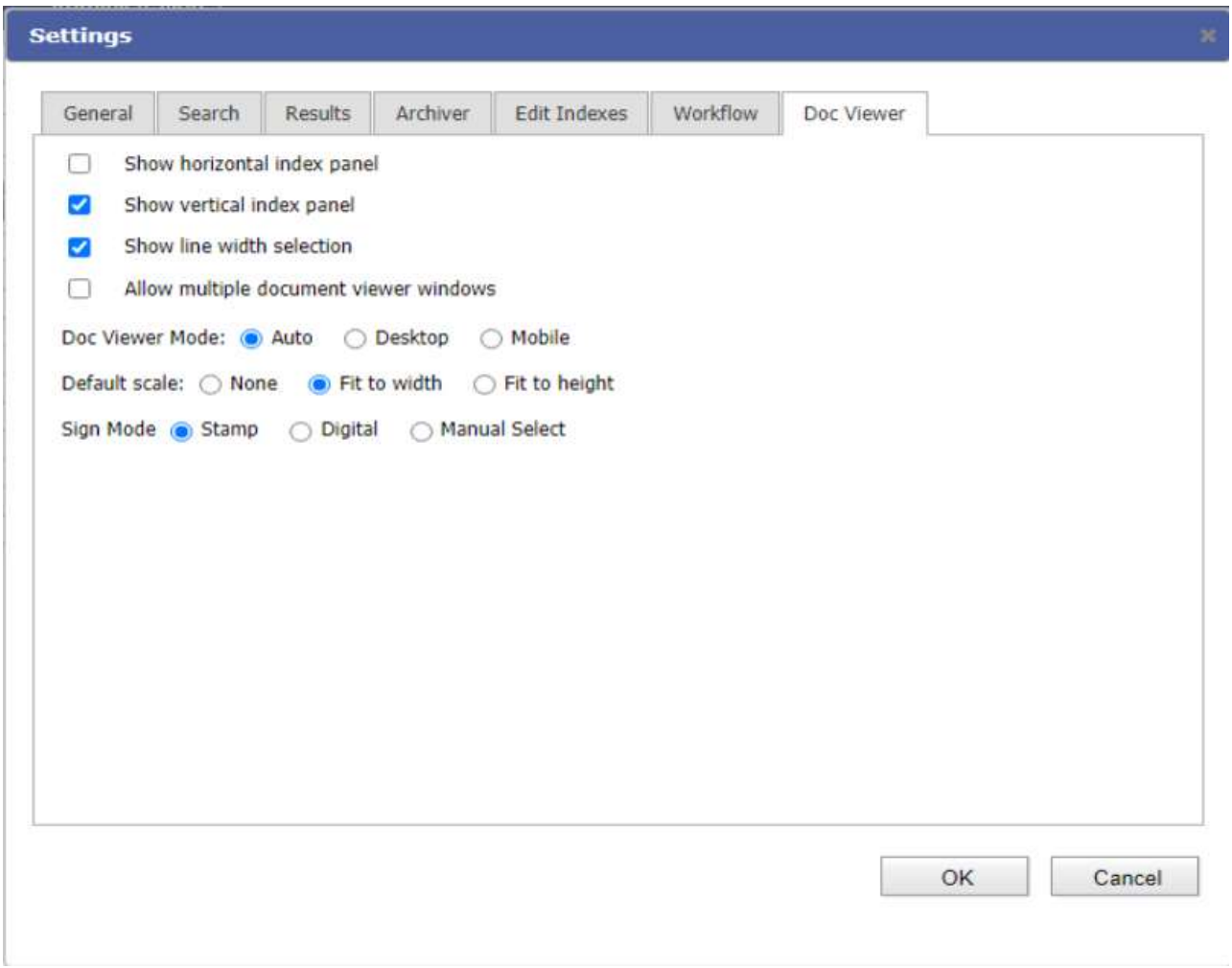
Enable Workflow Task Notification
When this option is checked ON, a notification window will appear on the bottom right corner of the screen notifying users of new task assignments.

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.

Doc Viewer Tab

The Doc Viewer tab should appear as follows.



Show horizontal index panel
When this option is checked ON, a panel with the indexes will appear in Doc Viewer at the top.

Show vertical index panel
When this option is checked ON, a panel with the indexes will appear in Doc Viewer on the left.

Show line width selection
When this option is checked ON, the line markup tool will appear in the Doc Viewer in the tool bar.

Doc Viewer Mode
This option allows the user to change the display mode of the Doc Viewer. Auto, will let the Doc Viewer decide when on either desktop or mobile. Desktop or Mobile, will force either desktop or mobile to only be used.

Default scale
This option allows the user to change the scaling of the document when viewing with the Doc Viewer. None, does not change scaling. Fit to width, scales width of document. Fit to height, scales to height of document.

Sign Mode
This option allows the user to change the Signature Mode used for signatures. Stamp adds your signature as a markup. Digital adds your signature and imbeds a signature certification. Manual allows the user to select the Sign Mode upon saving the document.

NOTE: Digital requires a signature certificate to be setup within FileNexus.

End of Document