



DocuServe

*The Document Scanning and
Management Solution*

User Manual for DocuServe by AISI

Version 1.3

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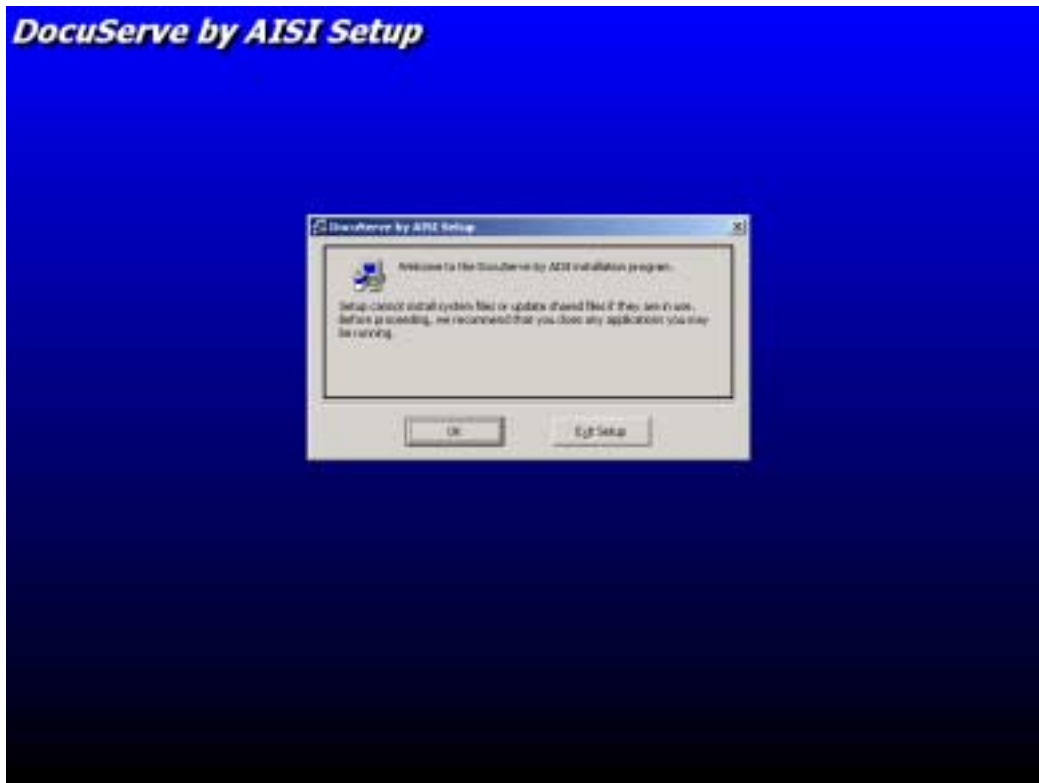
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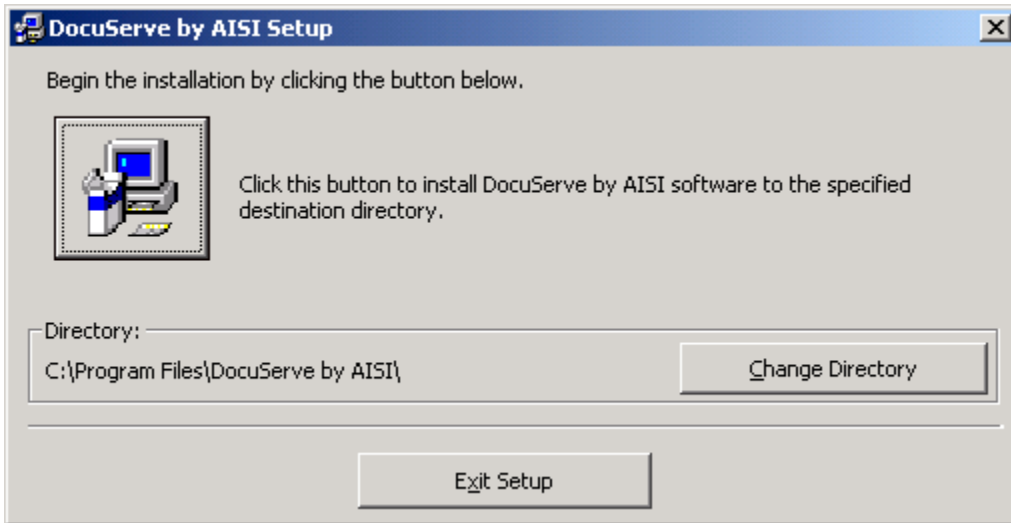
Introduction

The purpose of this manual is to describe the setup and installation of the DocuServe by AISI Document Management program. DocuServe is a simple to use Document Management system. It allows for the import of document images from any Twain scanner or files from your file system. It currently uses a Microsoft Access database for storing index information and stores files in their native format in a folder specified in the docman.ini file. DocuServe is multi-user capable and it has a simple security model. The security model can limit access to certain functions within the program. DocuServe also allows for creation of multiple databases for organizational reasons or security. An easy to use Search mechanism allows for users to search for documents and folders using key words that were applied to them through an index process. A document does not exist in the document database until it is indexed. Prior to being indexed it is in a “To Be Indexed” queue. Documents and folders are not limited to the number of keywords that can be applied to them.

Installation

Run the Setup.exe file provided on the installation media. Follow the steps in the installation wizard. Upon completion a program group will be created which can be accessed from the Start Button on your task bar.





Configuration

Ini File

The docman.ini file contains the necessary parameters to configure a workstation installation of DocuServe.

```
[Params]
```

```
DBConnect=Provider=Microsoft.Jet.OLEDB.4.0;Persist Security  
Info=False;Data Source=  
DBUsername=admin  
DocBaseDir=c:\docbase\
```

The parameters that should be modified in this file are the DocBaseDir, which is the location of the document repository. The index database is located in the DocBaseDir.

Database

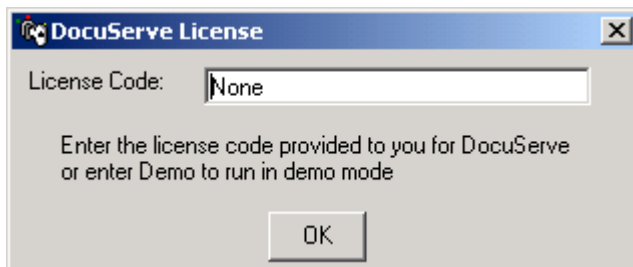
The database maintains the indexes, folders, and users of a DocuServe data repository. It is an MS Access Database. The name of this file is always **docbase.mdb**

DocBase

The docbase is the location (folder) of where all files of a respective DocuServe data repository reside.

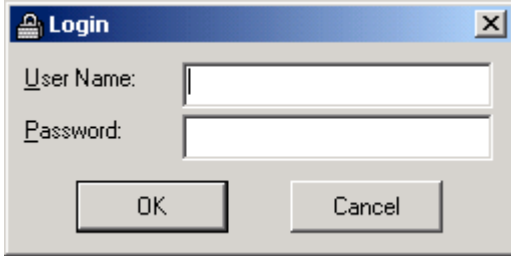
Startup

Upon startup of DocuServe, the user will be presented with a license window. Enter the license key that was given to you. You will only be asked this question the very first time that you startup DocuServe.



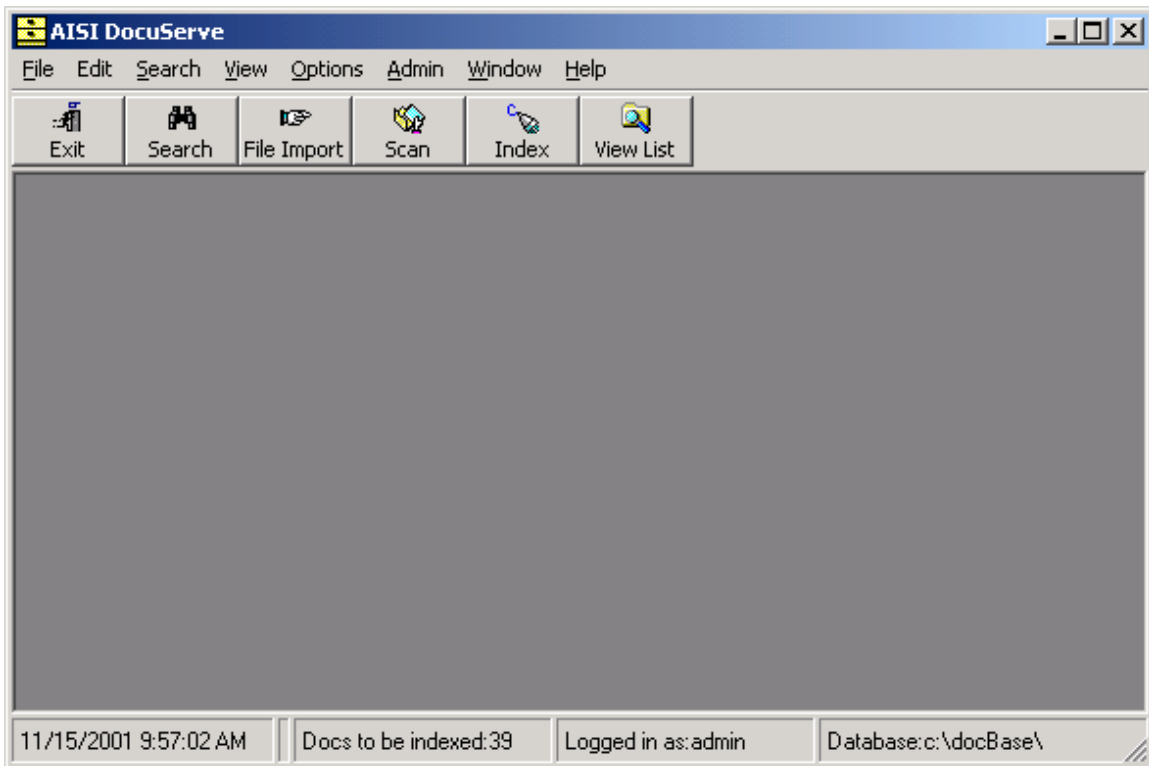
Login

If you purchased the Multi-User version of DocuServe, the user will be presented with a login window. For an initial installation, the username of **admin** and password of **password** will give access to the system.

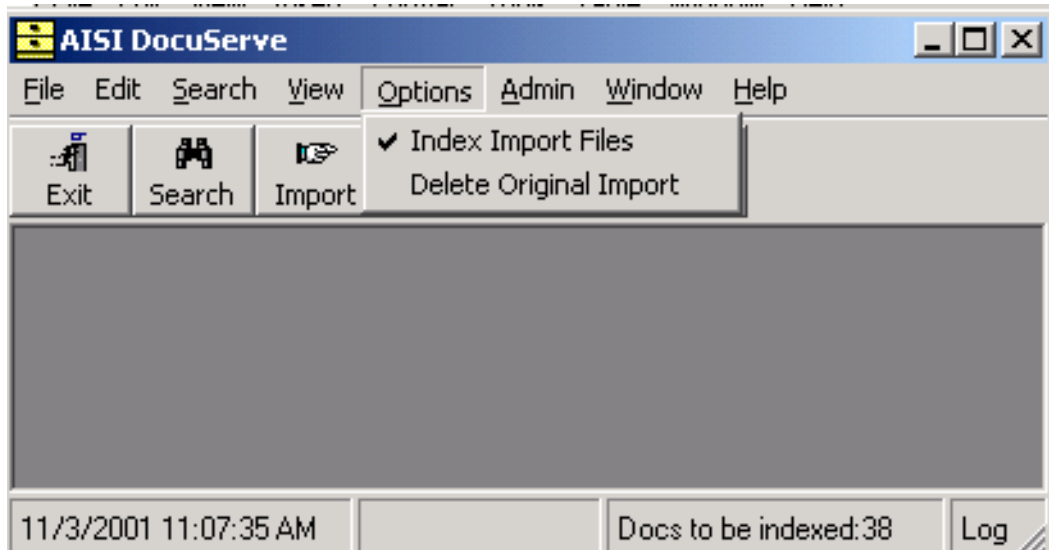


Main Window

The Main window is displayed after successfully logging into the system. From this window all DocuServe functionality is accessed. The status bar at the bottom of the window, displays the current time, the number of documents that need to be indexed, the database that you are logged into, and the username of the person who is logged in.



Options



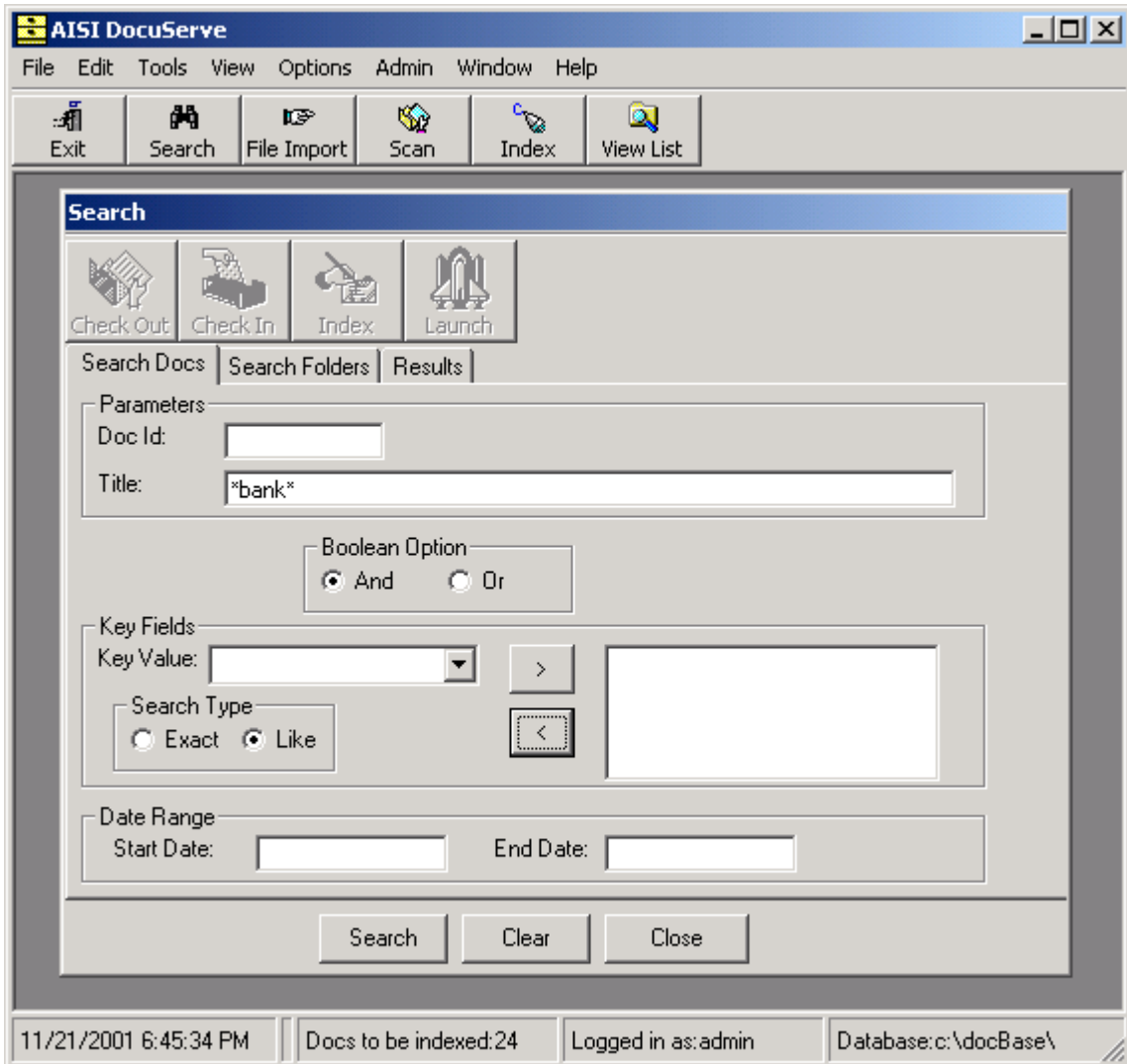
There are two options available from the main window; Index Import Files and Delete Original Import. The Index Import Files forces the index window to be displayed when a user either drags a file on to the main window screen or uses the File-Import – File system files. By default this is checked. When it is not checked, the import file goes into the Index queue, which can be accessed by pressing the Index button on the main window. The Delete Original Import option forces the original file that was imported to be deleted. By default this is not checked.

Search

Search Docs

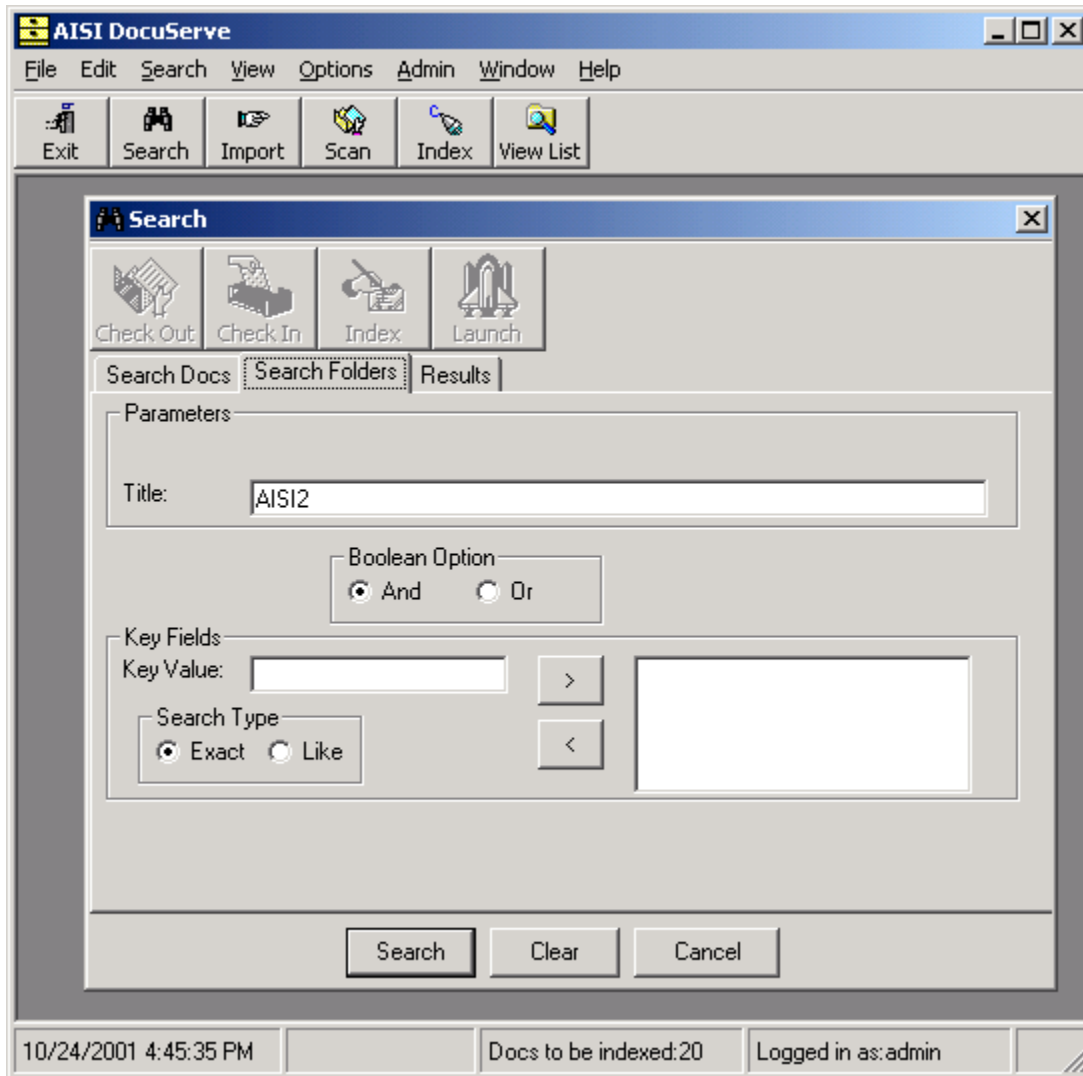
The Search Docs panel allows users to quickly locate documents in the DocuServe system. DocuServe allows users to perform a number of query types (exact, like, or, and and). Documents may be found based on an individual docId, the unique identifier for an document in DocuServe. When this query is performed, all other fields are disabled. If a like query is performed, wild card operators (* or %) are necessary before and after the keyfields or title you are searching for.

For example if you wanted to find all documents that had the string **bank** in the title, you would enter “***bank**” in the Title field then click the **Like** radio button then click OK. After the query executes, a pop-up window will indicate if the search returned any results. If the query returned items, you will automatically be placed in the results Tab.



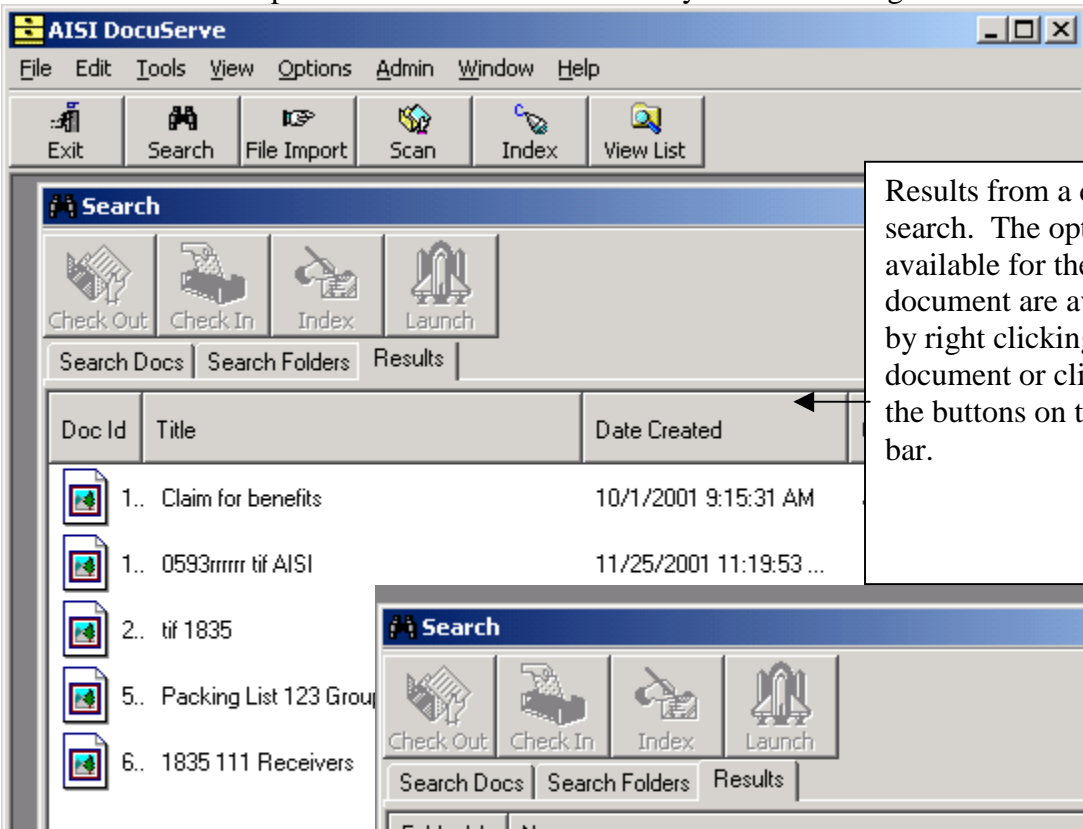
Search Folders

The Search Folders panel functions in the same way as the Search Docs panel except there are a few less fields to choose from. The results are displayed in the results Tab. If your query returns items, you will be directed to the results tab.



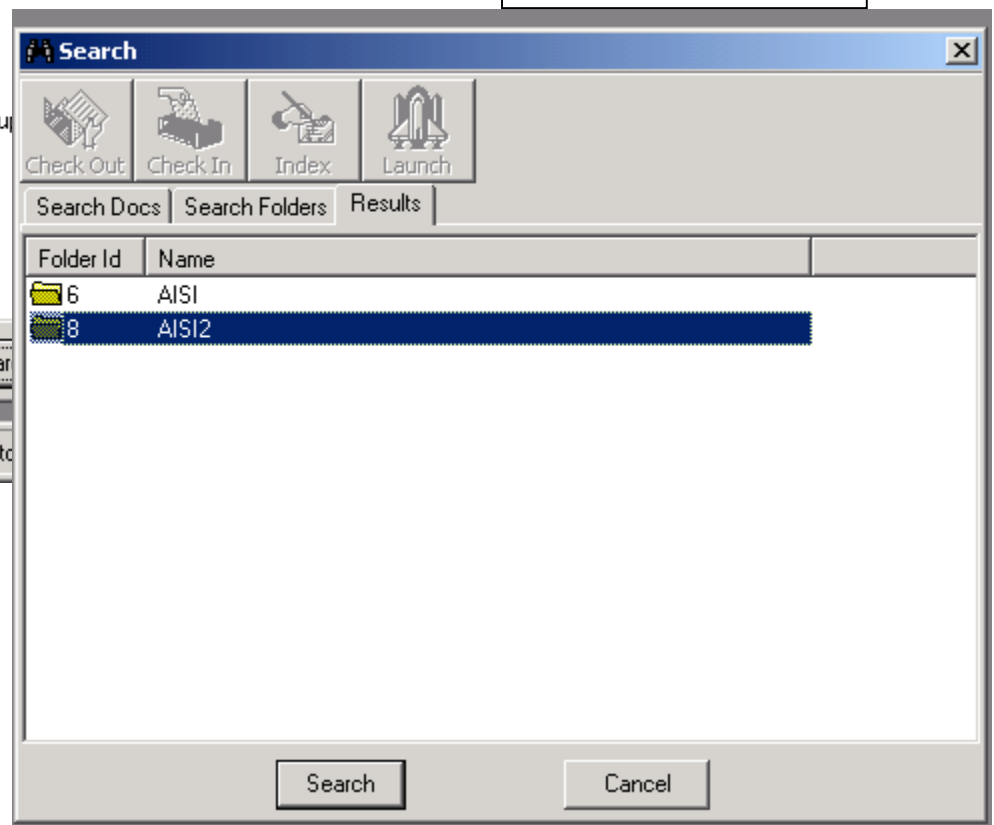
Results Panel

The results panel displays the results from your respective search. This panel is accessed by clicking on the results Tab. Documents may be viewed indexed checked-out, or checked in from this panel. Documents are viewed by double clicking on the row.



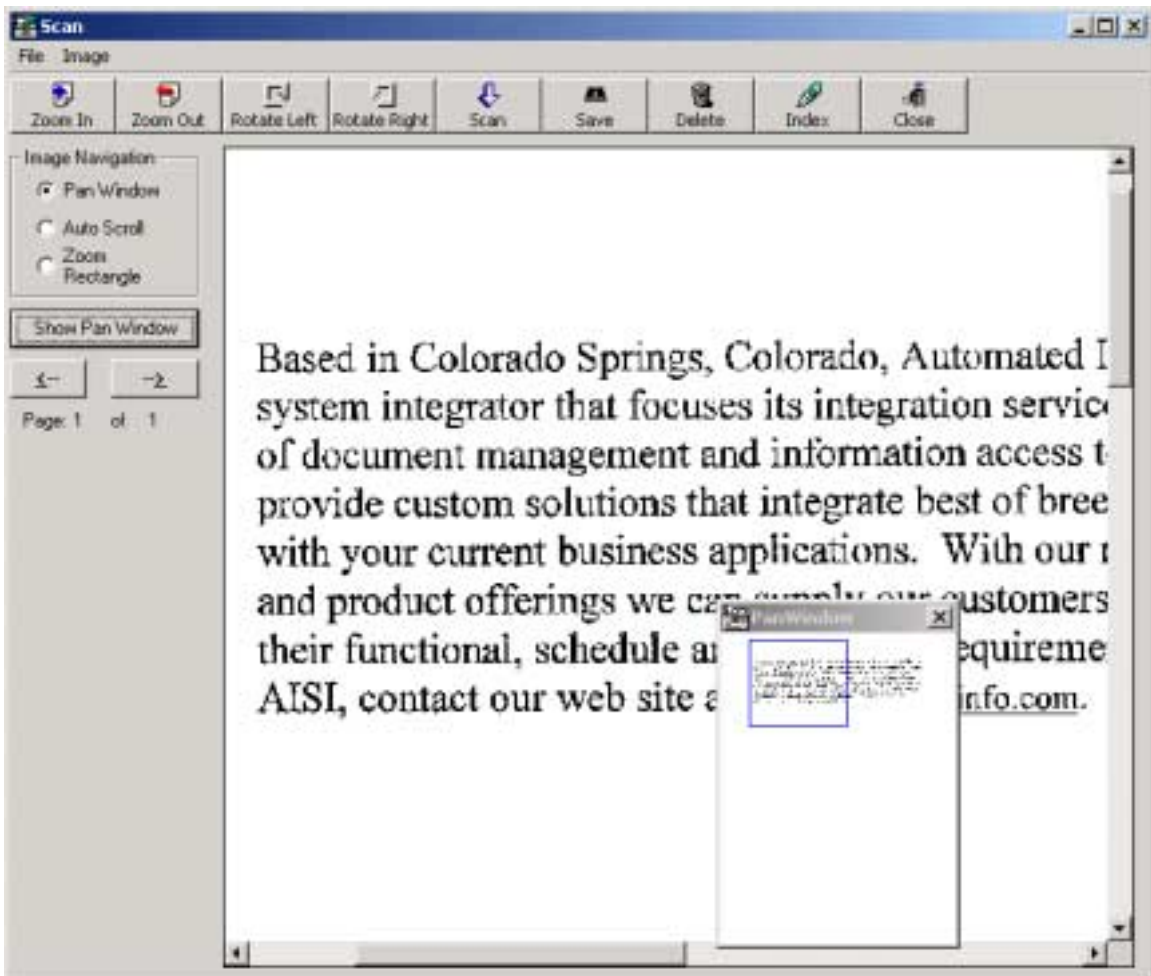
Results from a document search. The options available for the document are available by right clicking on the document or clicking on the buttons on the button bar.

Results from a document search. Double clicking on the folder will display the contents of the folder. Clicking on the results tab will return you to the folder results. A right click will allow you to edit the indexes on the folder.



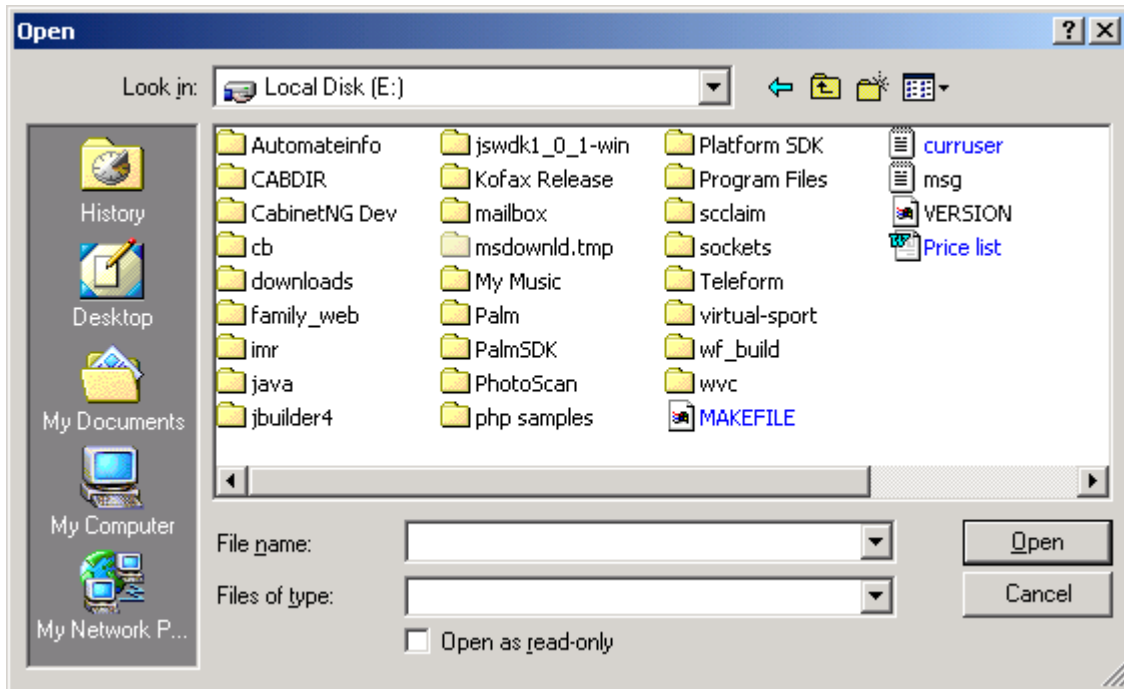
Scan

DocuServe has the ability to connect to any twain compliant scanner source. Documents can be scanned into the system by simply clicking on the Scan button located on the DocuServe menu bar. The scan interface uses your existing scanner's scan interface. Before scanning is initiated, you must select a scanner using the File-Select Twain Source menu pick. Once you have successfully identified your twain source, you can scan your documents into DocuServe. As documents are scanned, they are put into an index queue for indexing. The image may be manipulated by using the controls on the toolbar as well as the options on the left of the display. Click **Save** to save your document into the index queue. Clicking on the **Index** button allows you to index the document from the index window.



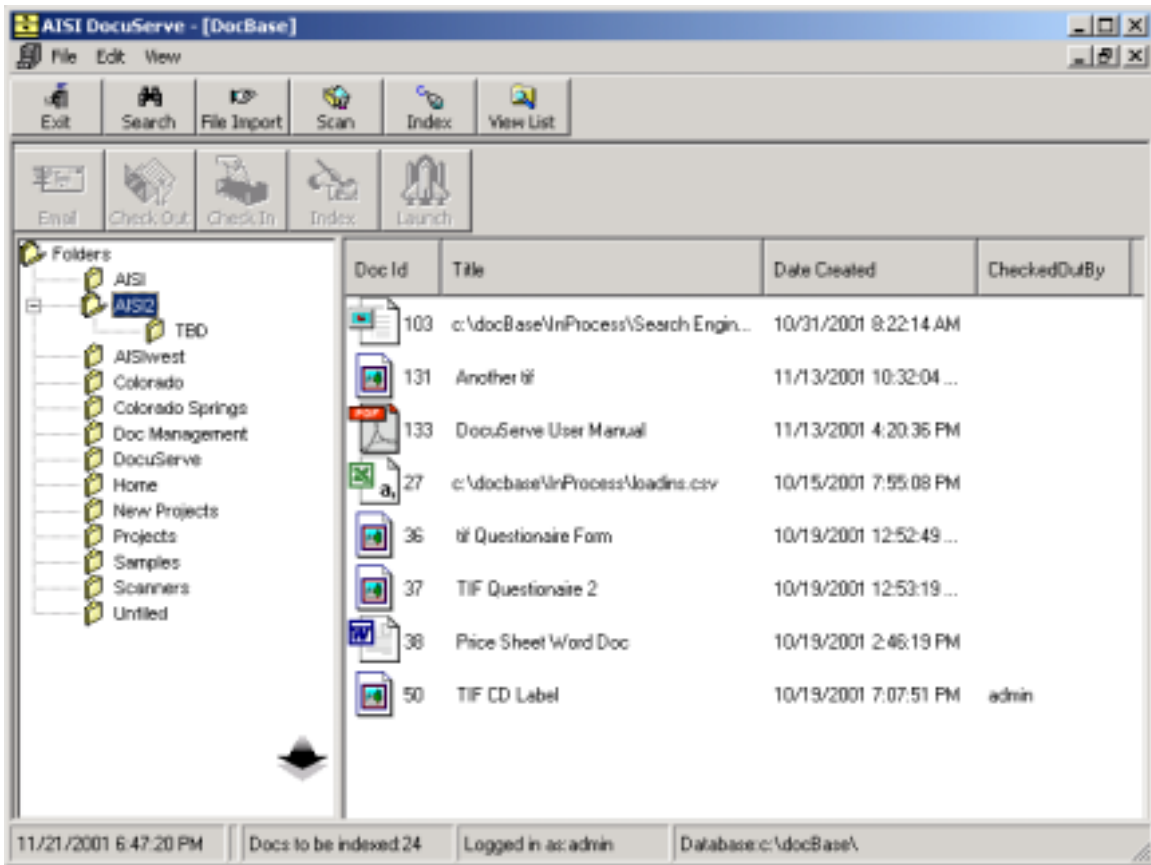
Import

Documents can be imported into DocuServe via the Import button on the main window toolbar or via dragging them on to the Main Window desktop. If they are imported via the Import button, a dialog window will be presented as shown below.



View List

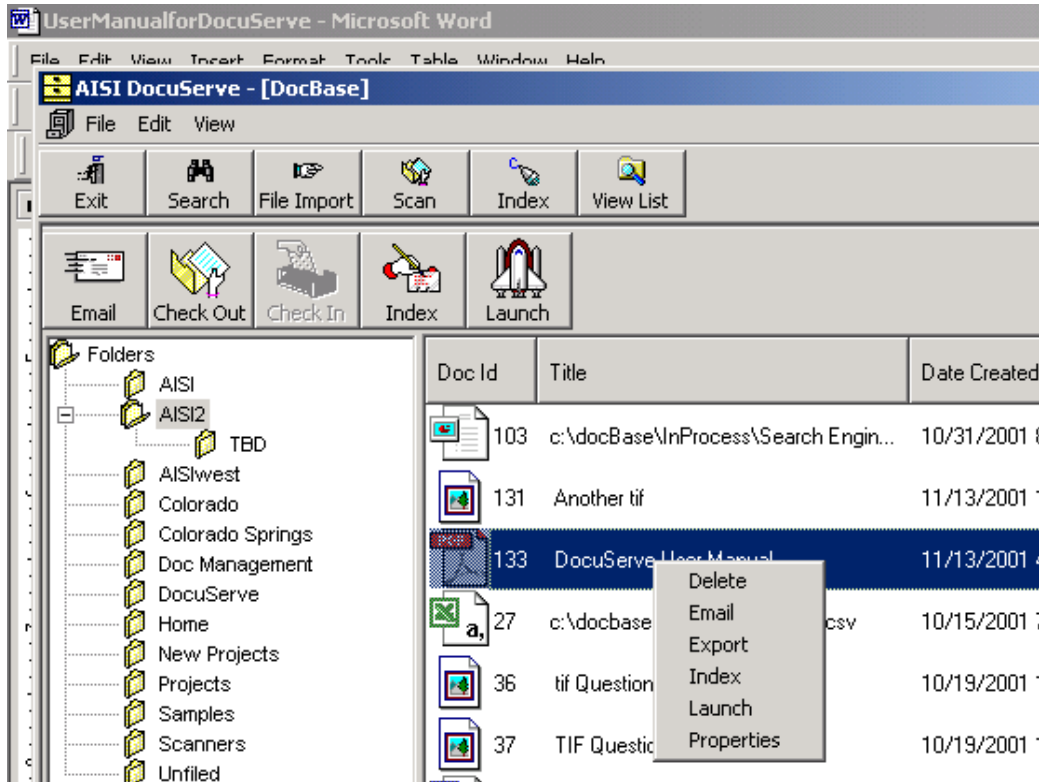
The View List Window is shown when the user clicks on the View List button on the main Window. The tree view on the left displays folders within the database. Clicking on a folder will display its contents in the list view at the right. From the list view, the user may display items by double clicking on them. From the list view, items may be sorted by clicking on the column headings. In addition documents may be moved into a desired folder by clicking on the document and then using the **Shift-drag** to drag the document to the desired folder.



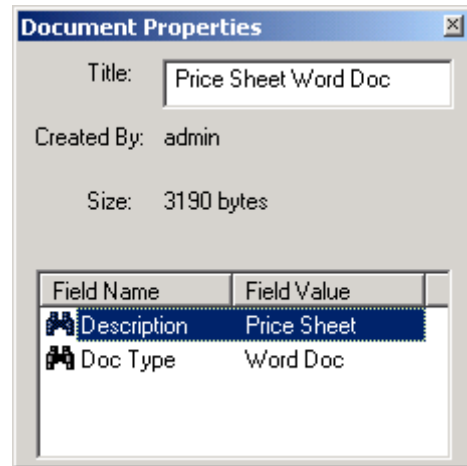
Up to 100 folders will be displayed in the treeview. To see more folders, press on the arrow located at the bottom of the tree. A splitter bar is also available between the treeview and listview.

List View Popup menu

Within the list view, a right click of the mouse will display a pop-up menu. From the pop-up there are 6 options, Delete, Email, Export, Index, Launch and Properties.

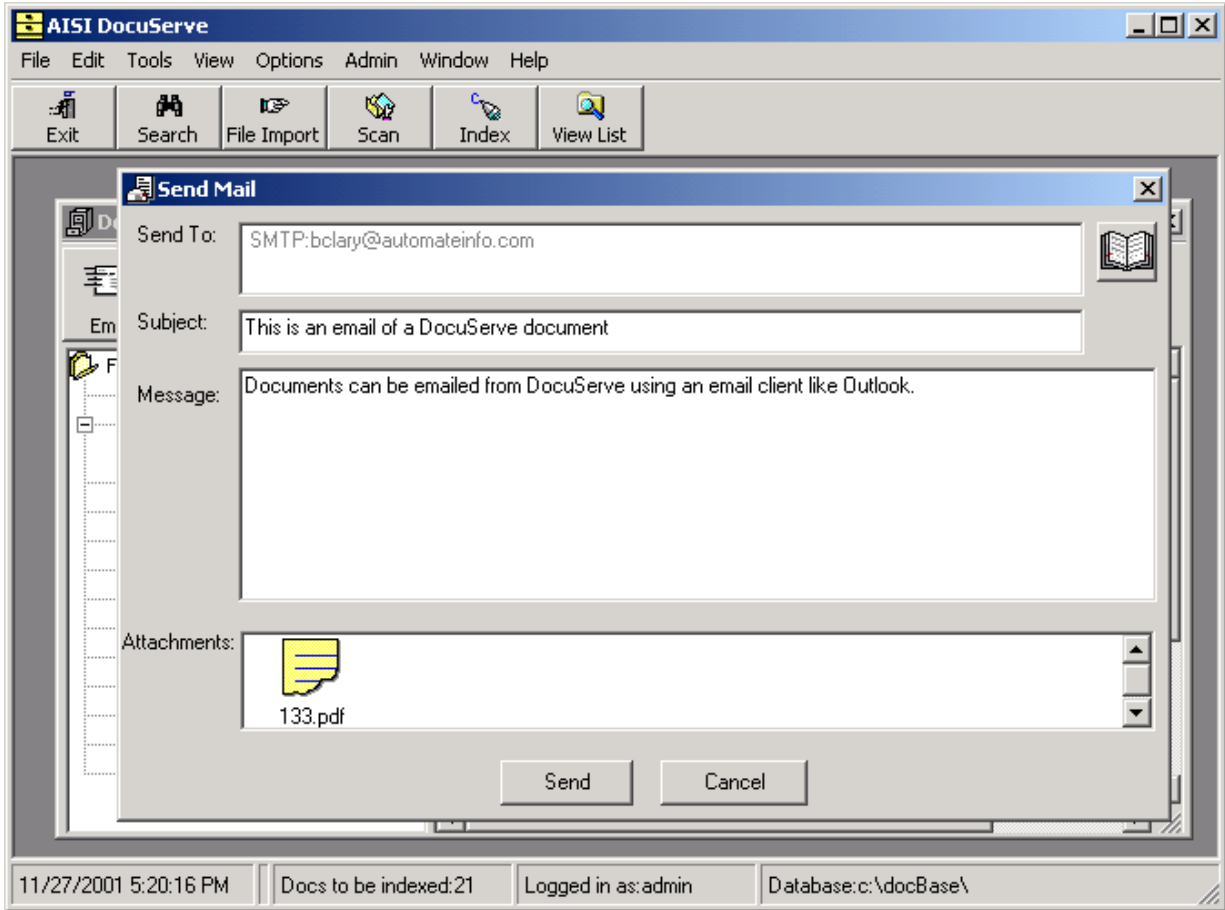


The Document Properties window floats on top of the View List window or search results window when the Properties menu pick is clicked.



Email

Documents may be emailed from the DocuServe system by selecting one or more documents in the window above and clicking on the email button. This invokes the following window. Recipients can be added or deleted by clicking on the book button in the upper right hand corner of the window. Recipients are added using your address book. The attached documents are listed in the attachment box.



Check Out

If documents need to be modified once they are in the DocuServe system, they must be checked out. This is done by selecting the document and pressing the Check-Out button. A dialog box will be displayed that indicates where you want to save the document you want to work on.

Check In

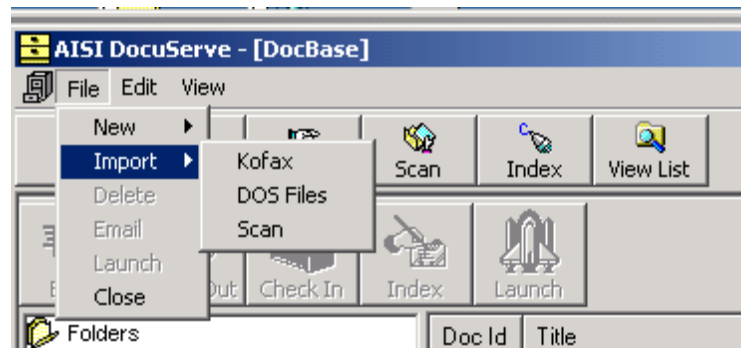
Once you are finished working on a checked-out document, you check it in. This is accomplished by selecting the checked-out document from the contents or search window and then pressing the check-in button.

Index

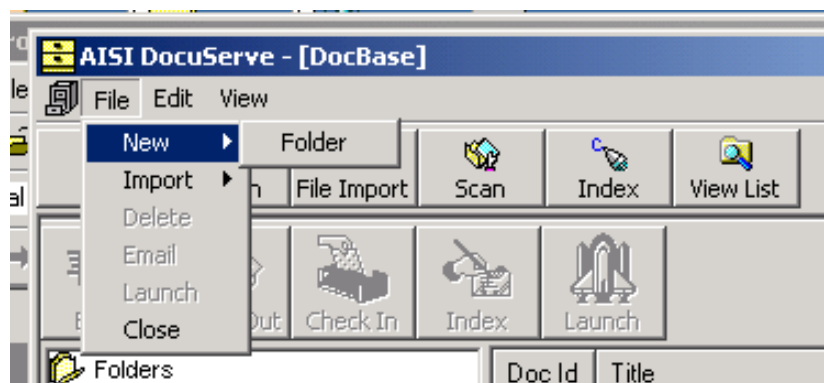
Document indexes may be modified by selecting the document from the contents or search results window and pressing the index button. This brings up the index screen and the document selected and allows the user to modify index fields or document location in a folder.

View List Menu Options

The View List window has its own menu options. From the File menu, you can Create New Folders, Import documents either from KOFAX, DOS Files, or your Twain scanner. You can also delete documents if you own them or you are an admin, you can email documents, Launch documents in their native application or close this window. The Edit menu allows you to index a selected document and the view menu allows you to refresh a folder.



When documents are imported in DocuServe from the View List window, they will be added to the folder that you currently have open. If you do not have a folder open, they will be placed in the **Unfiled** folder, which is a system default folder. The **Unfiled** folder can be renamed but not deleted.

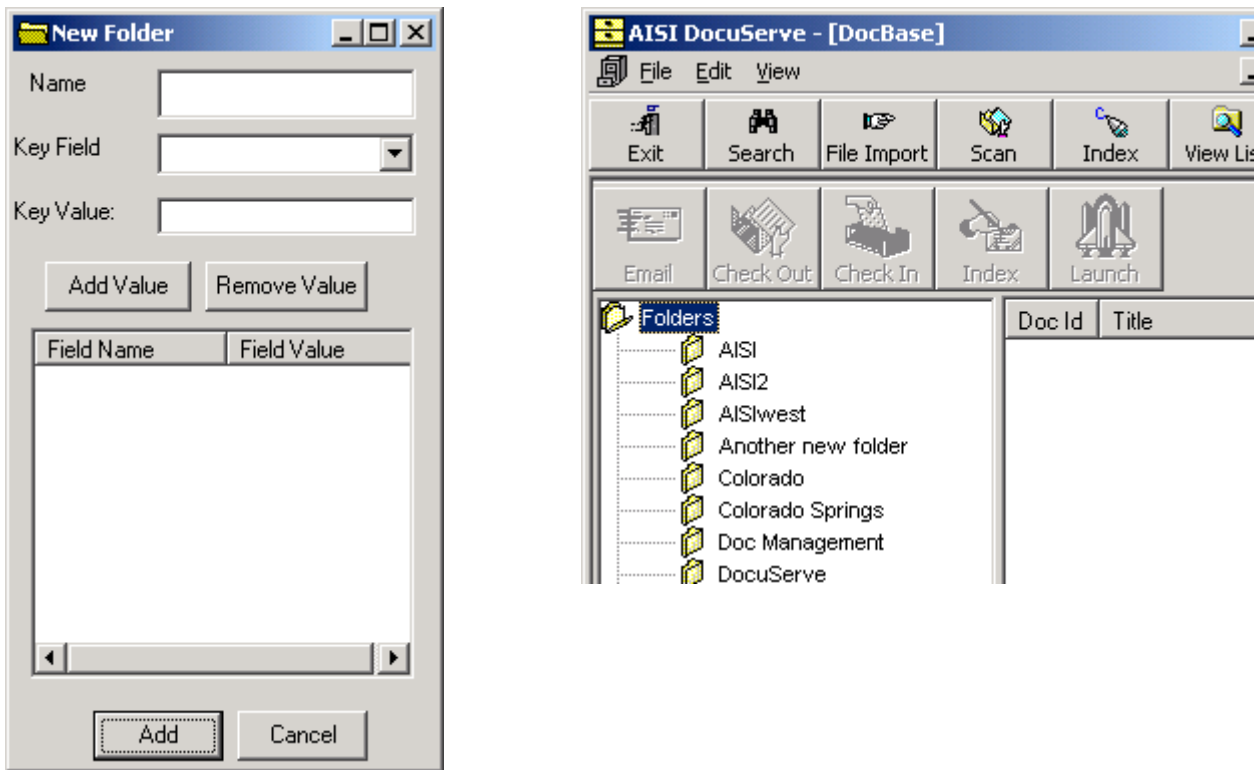


Folders

DocuServe can maintain documents in folders. Folders are containers that have attributes or indexes just like documents. These attributes may be searched on using the Search Window.

Create

Folders can be created in DocuServe via the main window or in the contents window. In the main window use the File-New Folder menu item. In the contents window, right click in the folder tree view. The following screen will be displayed.

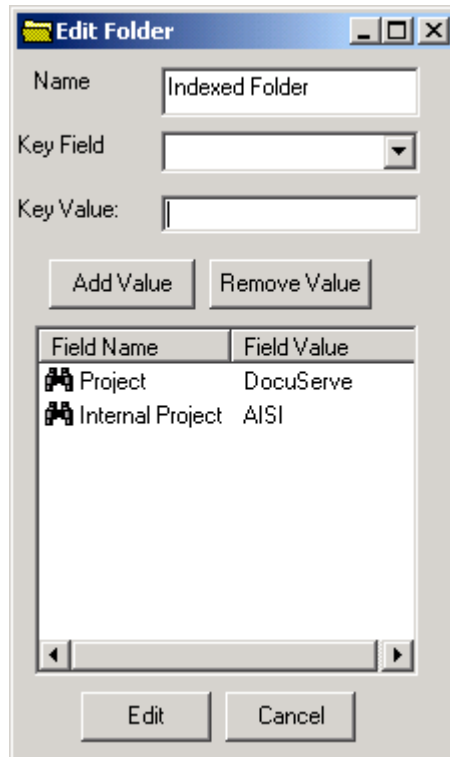


If this window is accessed from the View List window, the folder will be created in the folder that is currently open (Subfolder). Therefore, in order to create folders at the top level, be sure that no folders are currently open except the folders folder.

This window allows you create the folder and add indexes to it. To make the folder permanent, click on the add button. To close the window, press cancel.

Edit

Folders can be edited in the contents window as well as the search window in the results tab following a folder search. In the View Contents window, right click on the folder you want to edit. In the search window results tab, right click on the folder item in the folder results list. The following window will be displayed.



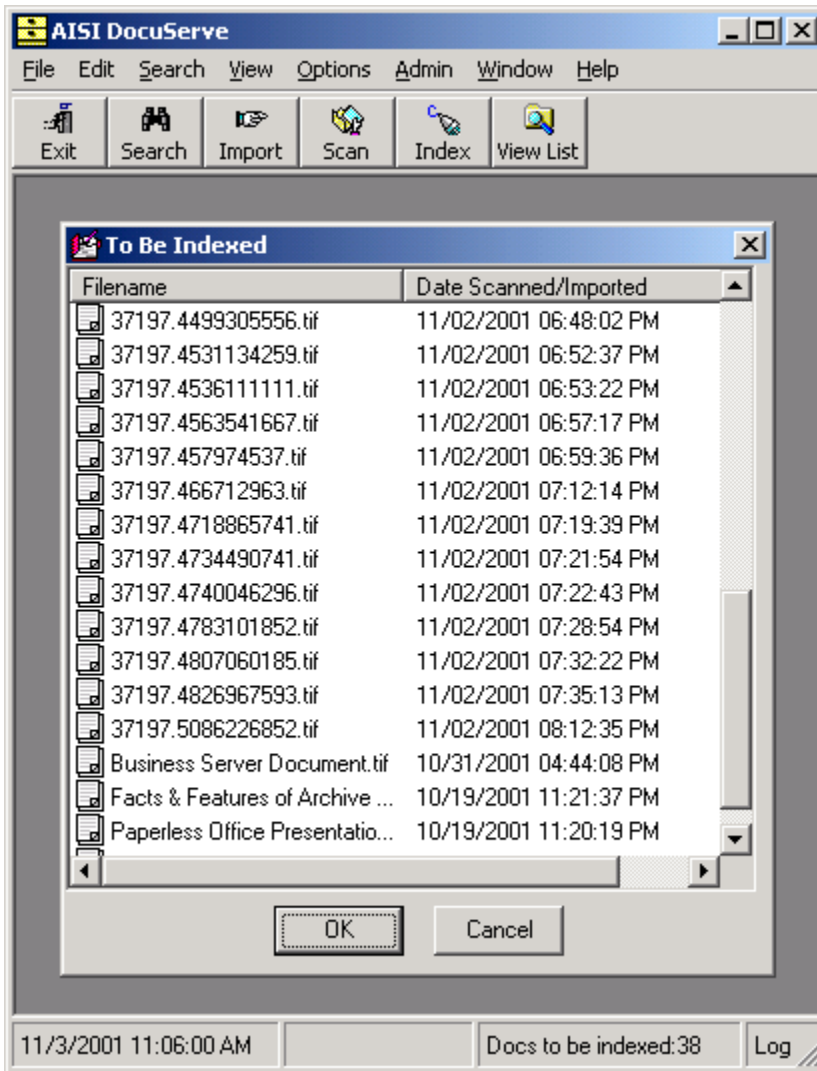
This window allows you to modify the indexes on the folder. To make the changes permanent, click on the edit button. To close the window, press cancel.

Delete

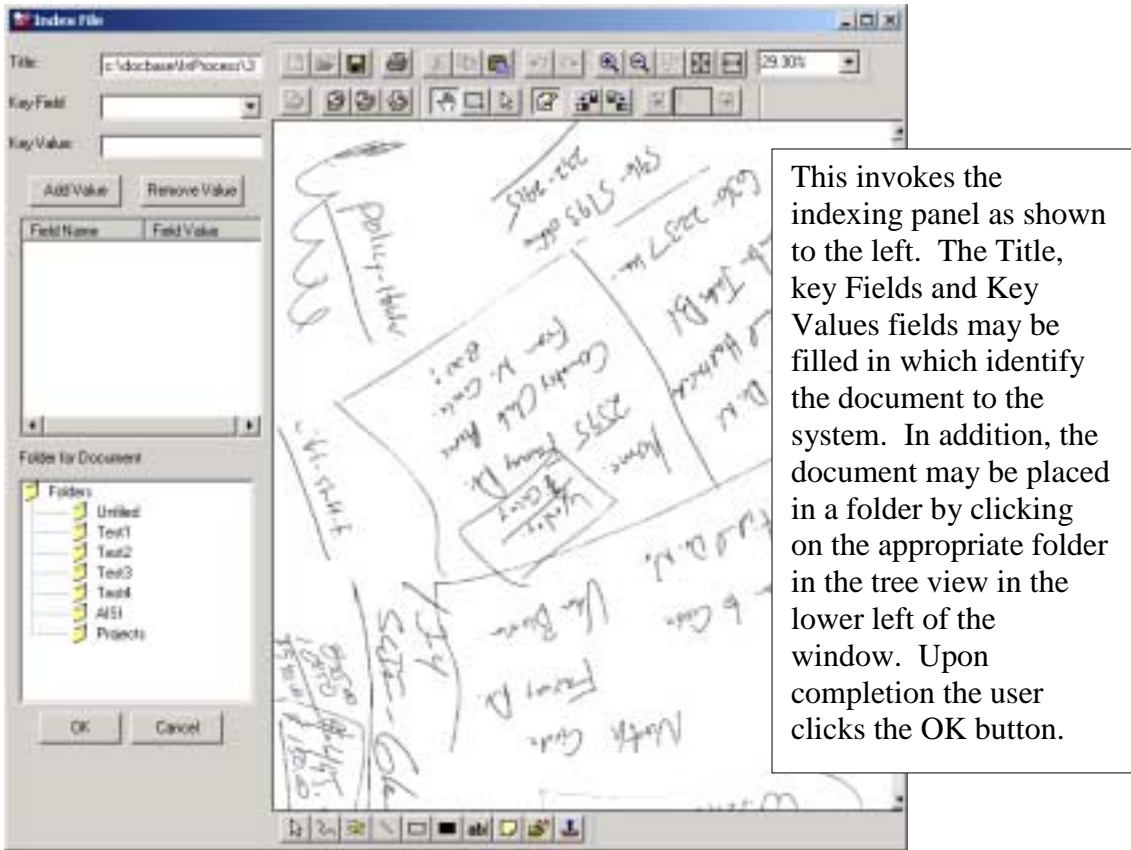
Folders may also be deleted. This is done by right-clicking on the folder you want to delete in the View List window. Documents that have been filed in this folder will no be found in the un-filed folder.

Index

In order to locate documents in a document management system, the documents must be indexed. Indexes are keywords that allow the user to locate documents. DocuServe allows multiple users to index documents that require indexing. Documents that require indexing are any that are scanned or imported into DocuServe. The Index button on the main menu is how a user invokes indexing. Upon pressing the index button, the screen shown below is displayed. A user can then pick an entry and press OK or double click on it.

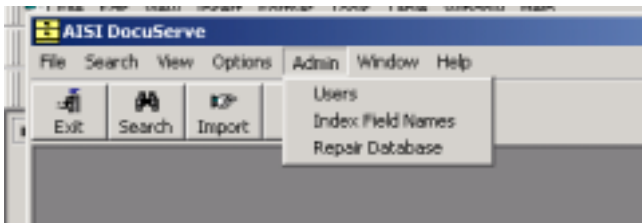


Documents may be re-indexed at any time via the View Contents window or the Search Results tab.



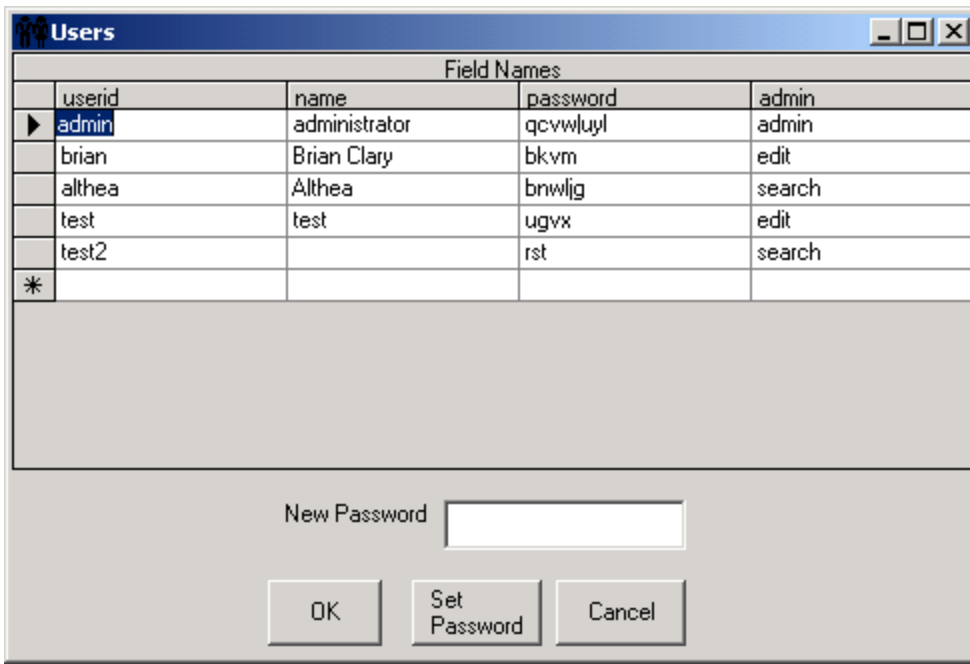
Administrative Functions

The following features are accessible from the main window Admin menu only if you purchased the Multi-User version. They are only accessible to users that are in the admin security group.



Users

From the users menu, you have the capability to administer users within a database. You can add users, remove users, set security levels and set passwords. Users do not have access to the database until their respective password is set. The security levels include admin, edit and search. The admin group is the super user group. All functions within DocuServe can be performed including deletion of documents. This user group should be assigned sparingly. The edit group allows users to add documents, checkout and check-in documents thus allowing users to edit documents within the database. The search group is a read only group. Users may only view documents in the database.



The screenshot shows a window titled "Users" with a table of user accounts. The table has four columns: "userid", "name", "password", and "admin". The "admin" user is selected. Below the table is a "New Password" input field and three buttons: "OK", "Set Password", and "Cancel".

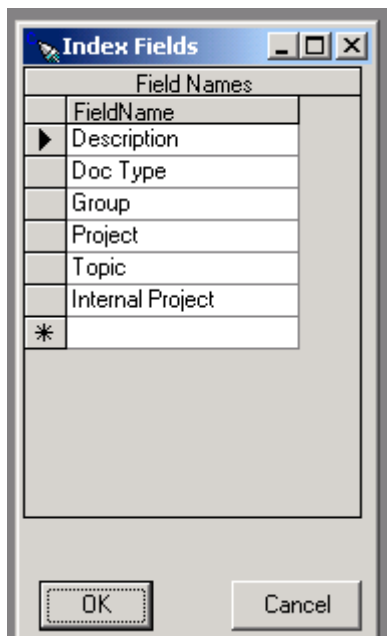
Field Names			
userid	name	password	admin
admin	administrator	qcvwluy1	admin
brian	Brian Clary	bkvm	edit
althea	Althea	bnwlig	search
test	test	ugvx	edit
test2		rst	search
*			

New Password

OK Set Password Cancel

Index Fields

From the index fields menu, you have the capability to administer index field types.

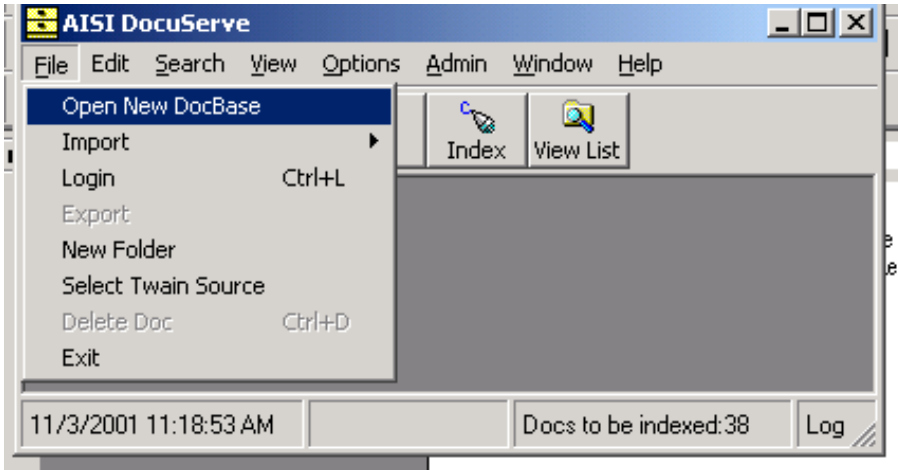


Repair Database

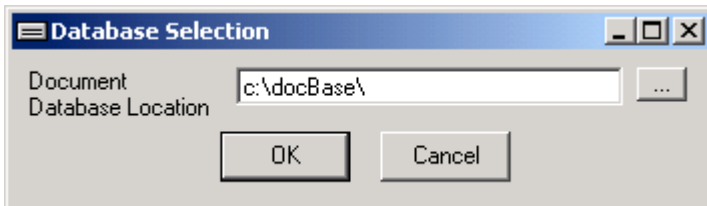
In the unlikely event of the database being corrupted, from this menu you have the capability to repair the index database. This function repairs and rebuilds the index tables as well as compressing the database. If your database has a number of deletions, this function will reclaim wasted space.

Open New Database

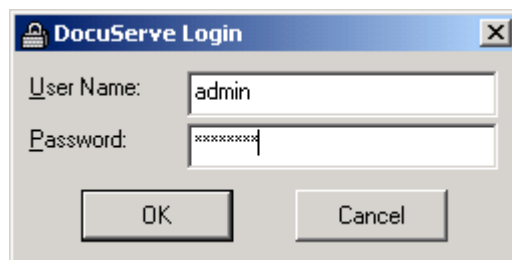
With DocuServe you can select multiple document databases. These might be delivered to you from a service bureau. To open a different document database use the File-Open New DocBase menu item from the main window. If the DocBase does not exist, you will be prompted to create a new Document Database.



The following window will be displayed.



Use this window to select the database and the document location folder. Be certain that the corresponding database points to the correct document folder location. After pressing OK, you will be prompted to Login to the new database.



Index

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