DocuMan™

User and Administrator Manual

Version 2.0

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Introduction

The DocuMan™ document management system provides an effective and practical solution to the need to index and store large amounts of data that can be accessed quickly and simply. Avoid archiving bulky paper hard copy by using a scanner to turn the information into small sized electronic files, or transform existing electronic files, which can then be categorized and indexed into a database within DocuMan™.

DocuMan™ is a client-server based system. Once installed on the web server it can be accessed by all the PCs on the network by entering the web address/ IP address, giving the system widespread availability across an Intranet or the Internet as required by simply using a web browser.

Using the scanner on your network, pictures, graphics and text of all kinds can be scanned in and imported into DocuMan™ as an easily managed file that can be stored using the system's comprehensive indexing system. Import existing files into DocuMan™ and index them in the same way.

Once your documents are within DocuMan™, comprehensive tools enable manipulation of the image to suit your requirements. There are facilities for sharpening the image, rotating, flipping, de-skewing and de-speckling. Adjustments can be made to the contrast, brightness and magnification etc.

Retrieval of the documents once they have been indexed is easy, the documents are suitable for moving electronically over a network or the Internet - they can be saved onto local hard drives or to FTP sites and can be e-mailed. Print the documents out to post, fax or use, or write onto CD-ROM as required.

The DocuMan™ database can be stored on a network server or is an ideal accompaniment for most data management devices such as the Ringdale Data Storage Server, enabling very high volumes of data to be stored and rapidly accessed, making large archiving facilities and their associated costs a thing of the past.

This manual guides you through the features of the DocuMan™ application to enable you to make effective use of its facilities and make the most of your document storage options.

The manual is divided into two sections, a general **User Guide** and an **Administrator Guide** which deals with configuration details for DocuMan™.

Administrators have a different log-in status to access greater facilities within DocuMan™. This access is restricted and so general users need only use the first section of this manual.

Key Features

High volumes of documents can be easily managed

Uses TWAIN to support scanners

Can be used in association with an Automatic Document Feeder for fast, unattended operation

Can import 25 file formats including TIF, BMP, JPEG, GIF, most newspaper clipping and faxserver formats

Uses templates for standard settings

Image manipulation capability

Web browser accessibility

System Requirements

Server Specification

The following server specification is required for running DocuMan™.

◆ Microsoft NT Server 4.0 or above.

   NT Options Pack 4 (Microsoft Front Page plug-ins and Internet Information Server required).

◆ Microsoft Internet Explorer 5.0 (version **5.00.2014.02161IC** or higher).

◆ Microsoft SQL Server 6.5 or higher.

◆ The minimum RAM requirement for such an application will depend on the number of users and the size of the database. It is recommended that you start with 192 Mb of RAM.

◆ Depending on the number of users, anything from a Pentium 200 MHz onwards is suitable, however the faster the processor the better the response times.

◆ Set the screen resolution of your PC to 1024 x 768 pixels or higher (ideally a screen size of 20 inches or higher should be used - using screens sized up to 15 inches will make viewing difficult).

◆ Sufficient hard disk drive space to support the database (this will vary according to your requirements).

Client Specification

The following specification is recommended for client PCs using DocuMan™.

◆ Ensure that the version of IE5 running on your PC is **5.00.2014.02161IC** or higher (this is required not recommended).

◆ Set the screen resolution of your PC to 1024 x 768 pixels or higher (ideally a screen size of 20 inches or higher should be used - using screens sized up to 15 inches will make viewing difficult).

◆ Use an internet connection with a speed of 64 K or higher (performance will be slow with anything lower) if remote access is required.

◆ A 200 MHz processor or higher (performance will be slow with anything lower).

◆ A minimum of 32 Mb of RAM for processing black and white images and 64 Mb of RAM for processing colour images.

◆ Sufficient hard disk drive space to store scratch scans if using a scanner with sheet feeder attached (this will vary according to your requirements).

1 DocuMan™ User Guide

Accessing DocuMan™ ────────────

DocuMan™ is a browser based program. It is **not** installed on your PC but on an FTP server on your network. It is accessed using Microsoft Internet Explorer 5 (IE5) in the same way as you would access any web-site.

Below is important information about how IE5 will need to be configured on your PC in order for you to gain full access to DocuMan™:

¨ Ensure that the screen resolution of your PC is set to 1024 x 768 pixels (this can be done by selecting **Start/Settings/Control Panel/Display** and clicking on the **Settings** tab for the **Desktop Settings** section).

¨ Ensure that the version of IE5 running on your PC is **5.00.2014.02161IC** or higher.

¨ Open IE5 and select **Internet Options** from the **Tools** menu at the top of the screen. Click on the **Settings** button in the T**emporary Internet Files** section of the **General** page. Ensure that **Every Visit to Page** is selected.

¨ To view DocuMan™ in IE5 it is necessary to have the **ImagXpress 3.0 ActiveX Control** software installed on your PC. If you haven't, upon accessing the site DocuMan™ will ask you if you want to download the software. In order to be able to download the program it is necessary to change your IE5 security level to **Low**. This needs to be done before you attempt to access the site.

   Important: after ActiveX has been installed on your machine it is strongly advised that you change the IE5 security level back to a Medium setting or higher.

   Use the following procedure to change the security level in IE5.

1) Open IE5 and select **Internet Options** from the **Tools** menu at the top of the screen.   Click on the **Security** tab.

2) Ensure that the **Default Level** display is showing (an example of the Security page with the Default Level display is shown below). If it isn't, click on the **Default Level** button to view the Default display.

3) Click the mouse on the slider button and drag the button to the bottom of the scale to set the security level to Low. Click **OK** to apply the change and exit the Internet Options dialog box.

When you access the DocuMan™ program you will now be able to download the ActiveX software onto your PC. When the download is complete use the same procedure to change the security level back to its original position.

DocuMan™ Accessing Procedure
Your network administrator will supply you with the URL web address to access DocuMan™ on your network.

As an example, the URL of the Ringdale demonstration DocuMan™ is:

http://documan.webpage-marketing.com

Enter the URL into the **Address** box in IE5 and press the **Enter** key on your keyboard to access the DocuMan™ program.

An example of the DocuMan™ opening screen is Shown below:
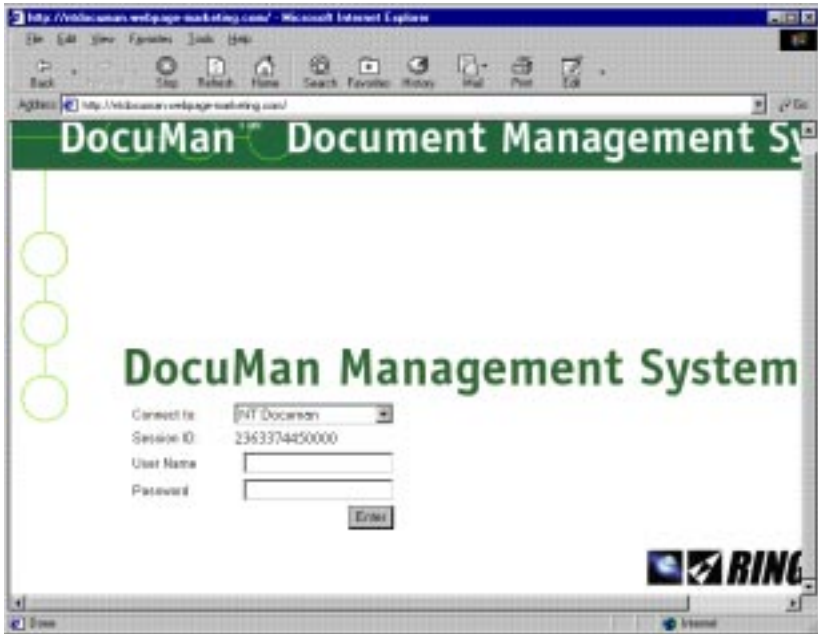
DocuMan™ Access Security

DocuMan™ has a security system to restrict access to the program, you will need to enter the **User Name** and **Password** to gain access. This information will be supplied by the network administrator.

It might also be necessary to select a section from the **Connect for** drop-down list. This feature allows enhanced security by creating sub-sections that are entered separately and can have separate passwords, allowing users access to only certain sections of DocuMan™.

When the correct information has been entered, click the **Enter** button to open the DocuMan™ main menu.

You are now ready to use DocuMan™.

Using DocuMan™ - Import Document

The DocuMan™ main menu screen has four options as shown below:

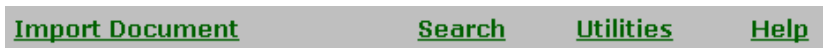**Import Document**   **Search**   **Utilities**   **Help**

Note: If there are newly scanned images that have been posted to DocuMan™ but have yet to be indexed into the database then a fifth menu option **Postings** will be present.

Click the mouse over each topic to access the option. Following is a guide to using the **Import Document** option.

This option is used for importing all documents into DocuMan™, whether they are pre-existing electronic files, freshly scanned in documents or a paste from the PC's clipboard.

The Import Document screen that is displayed on your PC will differ depending on whether there is a scanner attached to the PC or not. Below is an example of the options displayed for a PC **with** a scanner attached. It features three extra buttons at the top.

*Important Note: Using DocuMan™ with a Scanner for the First Time - DocuMan™ will need to be told that there is a scanner attached to the PC the first time it is used in order for the following options to be available. See the **Workstation** section of the **Utilities** chapter for details of configuring the scanner to DocuMan™.*

These two buttons only will be
displayed on a PC **without** a scanner
attached
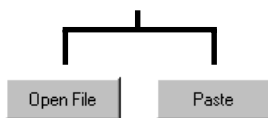
These additional buttons will be
displayed on a PC **with** a scanner
attached

| Open File | Paste | Configure | Acquire Page | Sheetfeeder |

The function of each button is described below:

Open File
This option allows you to import pre-existing electronic files into DocuMan™.
Use the browse facility to locate the required file from the PC's hard drive or
from across the network. DocuMan™ can open most popularly used formats
including Microsoft Office (Word, Excel, Powerpoint), bitmap, JPEG, GIF, TIF
and Windows Metafile.

Paste
Copy an image from another application and use this button to paste it from
the clipboard into DocuMan™.

Important Note: Using DocuMan™ with a Scanner for the First Time -
DocuMan™ will need to be told that there is a scanner attached to the PC the
first time it is used in order for the following options to be available. See the
Workstation *section of the* ***Utilities*** *chapter for details of configuring the*
scanner to DocuMan™.

Configure
This button will only be displayed if there is a scanner attached to the PC.
Clicking on this button will display the following dialog box:

It allows quick configuration of the settings for the scanner's **DPI (Dots Per
Inch) Resolution**, **Pixel Type** and the **Page Size Format**.

Use the **Save** button to apply any changes that are made before exiting the
dialog box.

Use the **Scan Source** button only if you want to change the scanner driver to
be used.

Use this dialog box before using the **Acquire Page** or **Sheetfeeder** buttons if required.

Acquire Page
This button will only be displayed if there is a scanner attached to the PC. Put the paper to be scanned into the scanner, click Acquire Page and the image will be scanned and immediately imported into DocuMan™.

Sheetfeeder
This button will only be displayed if there is a scanner attached to the PC. It provides a quick and direct way to import multiple scans into DocuMan™. Place the hard copy to be scanned into the sheet feeder of the scanner, click on the Sheetfeeder button and all the images will be automatically scanned and stored into the **Postings** display of DocuMan™. From there, each image can be viewed/manipulated and indexed into the database.

For full details on using the Postings display see the separate section **Postings** in the **Using DocuMan™ - Other Menu Options** chapter.

Whichever of the above options is used to import images into DocuMan™, the imported image will be displayed with a comprehensive set of tools available to manipulate the image to your requirements before indexing into the database. Full details of the image manipulation tools follow.

Image Manipulation Features
DocuMan™ has the following features that allow you to manipulate the image to your requirements before saving it into the database, each feature is activated by clicking on the respective button down the left hand side of the screen (each button is listed in the order it appears on screen).

Undo
Click on this button to undo the last change you made to the image.

Sharpen
Each time this button is clicked it will sharpen the image, useful if the image is ill defined.

Flip
Click on this button to turn the image by 180°.

Rotate
Click on this button to rotate the image by 90° turns.

Brightness
Click and hold on the slider, then drag up or down the scale to increase/ decrease the brightness of the image.

Contrast
Click and hold on the slider, then drag up or down the scale to increase/ decrease the contrast of the image.

Zoom
Click and hold on the slider, then drag up or down the scale to increase/ decrease the magnification of the image.

Deskew
This button is for use with scanned images that have been misaligned by the scanner. Click this button to set the image straight.

Despeckle
This button can be used to clean up the image, for example if dirt on the scanner screen has left speckles on the image.

Invert
Click on this button to invert the image into a negative, or to convert a negative into a conventional image.

Autocrop
Click this button to remove the 'white space' around an image.

Crop
Click and hold the mouse down over the image and drag to draw a box. Size the box to fit a section of the image that you want to keep. Click the Crop button to select the part of the image within the box and discard the rest. Especially useful if only part of an image is required to be saved in DocuMan™, this feature enables you to edit images specifically to your requirements.

Copy
Click and hold the mouse down over the image and drag to draw a box. Size the box to fit a section of the image that you want to copy and past elsewhere (if you want to copy the whole image to paste into a different application, simply draw the box around the complete image). Click the Copy button to

copy the selection. The image will be saved on to the clipboard for you to paste as required.

Email Now
Click this button to instantly Email the image to an Email address of your choice. The following window will be displayed.

Enter the **Email Address** into the box.

Enter any **Text** to be sent with the file.

Click the **Send** button to send the Email.

Indexing the Imported Image
When the image has been manipulated to your satisfaction, use the buttons situated above the image to store it into the database. Shown below are the four indexing options available.
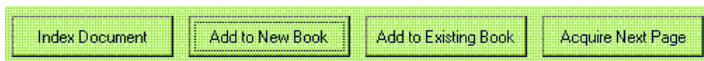
Following are details of the function of each button:

The sophisticated indexing system in the DocuMan™ database allows for the creation of departments, categories and books to enable images to be stored in a highly structured way, allowing easy access and search capabilities when the item needs to be retrieved.

Select the button which most suits your requirements:

If you want to create a new book to index the image into (for instance if a document that you are scanning in is more than one page then there will be several files to be stored that will need to be kept together) then select the **Add to New Book** button.

If the image needs to be stored into an existing book (for instance the second or third page of a document), select the **Add to Existing Book** button.

If a book isn't required, the image can be indexed straight into the required categories by selecting the **Index Document** button.

Whichever button is clicked, the indexing features will be displayed on the right side of the screen.

Note: the departments, categories etc. that will be available from the drop-down lists will be set by the network administrator, only new books can be created by the operator. If a new category is required contact the network administrator.

Index Document

Use this option to store an image straight into DocuMan™ without the need for creating a book. Clicking this button will display the indexing features on the right side of the screen as shown below:

The following information needs to be configured before saving the image into DocuMan™:

Enter the **Scan Date** and then select the **Department** and **Category** that you want the file to be stored in.

Note: if you can't find the department or category that you want check with the system administrator that you have been granted the required access rights.

In the **Description** box enter details about the image. **Important:** information entered into the Description box will be used to locate the file from the database at a later date so use words that will quickly identify the file when a search is being made.

Note: ensure the required department and category have been selected before you enter text into the Description box, as the Description box will automatically clear when a new department is selected.

Enter a name for the file into the **Document Title** box. Enter a relevant name into the **Scanned By** box.

From the **Save as Type** drop-down list, choose the file format the image will be saved as when entered into the DocuMan™ database. Available formats include bitmaps, TIFs and JPEGs.

Click on the **Save Image** button to save the image into the database using the configurations you have specified above.

If your DocuMan™ is set up with an Aperture Card database, then the **AC Index** button can be used to save the image as an aperture card file

The image is now indexed into the DocuMan™ database.

Add to New Book

Use this option to store an image into DocuMan™ with a new book. If a document that you are scanning in is more than one page then there will be several files to be stored that will need to be kept together. Clicking this button will display the **Create New Book** feature on the right side of the screen in the same way as previously described for the Index Document button. Save all related files into the same book for easy and efficient access when retrieving the files from the database. Enter the required details in the same way.

The following information needs to be configured before saving the image into DocuMan™:

Enter the **Scan Date** and then select the **Department** and **Category** that you want the file to be stored in (see the system administrator if you don't have access rights).

In the **Description** box enter details about the image. **Important:** information entered into the Description box will be used to locate the file from the database at a later date so use words that will quickly identify the file when a search is being made.

Note: ensure the required department and category have been selected before you enter text into the Description box, as the Description box will automatically clear when a new department is selected.

Enter a name for the book into the **Book Title** box. Enter a relevant name into the **Scanned By** box.

From the **Save as Type** drop-down list, choose the file format the image will be saved as when entered into the DocuMan™ database. Available formats include bitmaps, TIFs and JPEGs.

Click on the **Index Book** button to save the image into the database using the configurations you have specified above.

If your DocuMan™ is set up with an Aperture Card database, then the **AC Index** button can be used to save the image as an aperture card file

The image is now indexed into the DocuMan™ database within a book as you specified.

Add to Existing Book

Use this option to store an image into an existing book within DocuMan™. Clicking this button will display the indexing features on the right side of the screen in the same way as previously described for the Index Document button. Enter the required details in the same way.

The following information needs to be configured before saving the image into DocuMan™:

Enter the **Scan Date** and then select the **Department** and **Category** that you want the file to be stored in **(**if you can't find the department or category that you want check with the system administrator that you have been granted the required access rights).

In the **Description** box enter details about the image. **Important:** information entered into the Description box will be used to locate the file from the database at a later date so use words that will quickly identify the file when a search is being made.

Note: ensure the required department and category have been selected before you enter text into the Description box, as the Description box will automatically clear when a new department is selected.

Enter a name for the file into the **Document Title** box. Enter a relevant name into the **Scanned By** box.

From the **Save as Type** drop-down list, choose the file format the image will be saved as when entered into the DocuMan™ database. Available formats include bitmaps, TIFs and JPEGs.

Click on the **Choose Book** button to display the following dialog box:
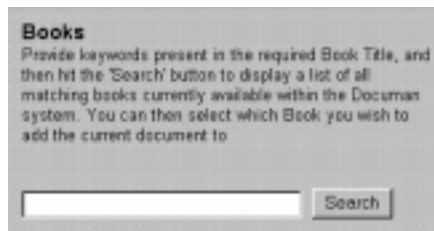
Enter the relevant keyword to search for the required book (for example, if you called the book *Order No 458*, enter Order No 458 to find that specific book). The less specific the information entered, the larger the number of books that will be found. Click the **Search** button to display a list of matching books located by DocuMan™.

If you can't remember the name of the book you want, leave the Keyword box blank and click the Search button to display a list of all the books available.

Below is an example of the dialog box that will be displayed showing available books that match your search criteria:

Matching Books

The following books have been located which the currently imported Document may be added to.

To add this current Document to any of the Books found, simply check the corresponding Add check box and hit the 'Add to Book' button

Title	Author	Pages	Add
Russ1	Bob	2	☐
Hallpics	Tom	1	☐
Shopinfo	Xenia	1	☐
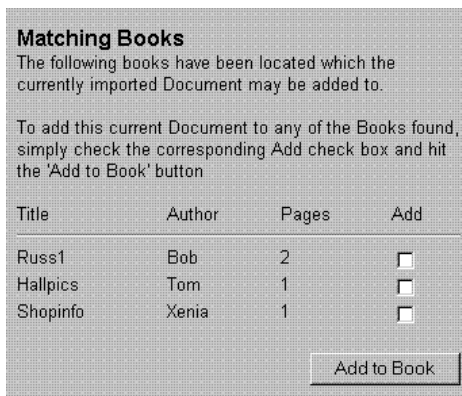
Add to Book

To index the current image into the existing book, tick the **Add** box next to the book you require. Click on the **Add to Book** button and the file will be added to the book you have chosen.

The image is now indexed into the DocuMan™ database within a book as you specified.

Acquire Next Page

This button is not actually concerned with indexing the image, but can be used to import the next scanned image posted in DocuMan™ that is awaiting indexing (for use when a sheetfeeder has been used to post multiple scans into the Postings section). After indexing an image into the database, click this button to import the next scan. Especially useful for saving time when indexing a large number of images.

Using DocuMan™ - Search

The **Search** option is used for retrieving the files stored into the DocuMan™ database. Clicking on the Search option will display the following page in the right side of the screen:

From the drop-down lists select the **Department** and **Category** of the file/s you wish to retrieve.

By using the **Scanned After** and **Scanned Before** calendars you can refine the criteria of your search.

Enter **Keywords** into the box to aid identification of the files - this will be a word or words that were entered into the Description box when originally saving the file into DocuMan™.

If you want to display a list of all the files in a particular category - or you cannot find the file you want - leave the calendars and Keywords sections blank.

When you have set your search criteria to your requirements, click the Search button and DocuMan™ will display a list of search results. An example is shown below:
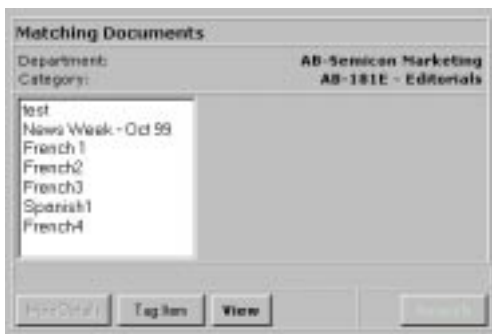
The buttons displayed beneath the list have the following features, select a file from the list before using them:

More Details
Click this button to display full details of the contents of the file (this will be the information entered into DocuMan™ when the file was indexed to the database). A typical example is shown here:

Use the arrows on the right to scroll up and down and view all the information.

Tag Item
Click this button if you want to extract the file from the database. The selected file will be entered onto the Output List. Select as many files as required to add to the Output List. The Output List display in the bottom right corner of the screen will tell you how many files you have selected. There are two ways to extract files from the database, printing the document/s or Emailing the document/s.
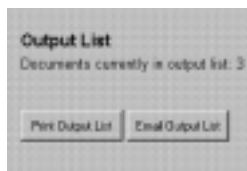
Clicking on the **Print Output List** button will display the following dialog box on the left side of the screen:

Print Output List

Document Name	Print Copies
test	1

| Clear Output List | Print List |
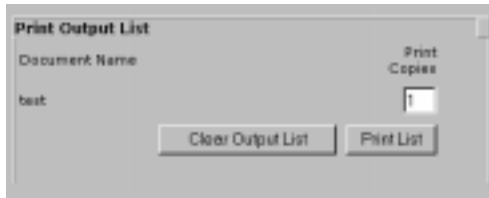
All the files on the Output List will be displayed. Enter the number of copies of each file you want to print. Click on the **Print List** button to print your selection. The print job will be sent to your default printer (see the *Printer* section of the *Utilities* chapter for details on selecting alternative printers and altering printing configurations).

If you want to clear the Output List, select the **Clear Output List** button.

Clicking on the **Email Output List** button from the Output List Display will show the following dialog box on the left side of the screen:

Email Output List

Email Address:

Email Title:

Message Text:

Document Name   Email
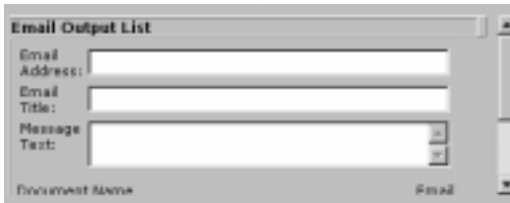
Fill in the Email details as required. Use the arrows on the right to scroll up and down the dialog box. The following features will be found at the bottom.

Document Name	Email
test	☑
News Week - Oct 99	☑

| Clear Output List | Email List |
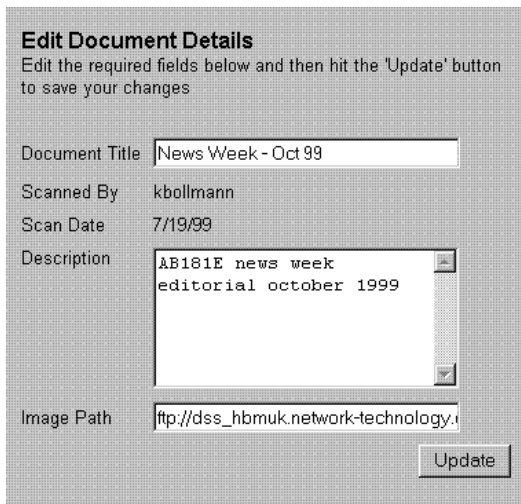
Remove the tick from the box alongside a document if you **don't** want to send that particular document in the Email. Click the **Email List** button to send the Email with the required documents from the DocuMan™ database. Use the **Clear Output List** button to remove the list if required.

View

Clicking this button will display the selected file in the left side of the screen. The image manipulation tools will appear down the left margin of the screen to allow the image to be changed if required (see the section *Image Manipulation Features* in the *Import Document* chapter for details on using these features). At the bottom of the tools display will be two new buttons.

Re-Save allows you to save any changes you make to the image.

Edit Details allows you to change the DocuMan™ file details if required. Click this button and the following display will appear on the right side of the screen:

Change the document title and description as required.

The **Image Path** box should be altered when the file has been moved to another directory. This will be necessary to renew the link from DocuMan™ to the file. **Important:** if the details in this box are altered without moving the file then the link will be broken and DocuMan™ will not be able to open the file.

Click on the **Update** button to apply your changes.

Search

Click on this button to return to the Search screen and enter new search criteria.

Using DocuMan™ - Utilities

Selecting the **Utilities** option from the main menu will display the buttons shown here on the right side of the screen.

Note: if the user has administrator rights there will be an extra button named **Supervisor**. This provides access to the setup and management facilities of DocuMan™ (for information on using these facilities see *section 2 - Administrator Guide* of this manual).

Important: the Workstation option is used to configure a scanner to DocuMan™ if you want to use one. The first time DocuMan™ is used on a PC with a scanner attached, use this option to tell the program to find the scanner. Once this initial configuration is complete, DocuMan™ will recognize automatically if there is a scanner attached to the PC whenever the PC is used to access the program.

The three buttons provide the following facilities:

Postings
Clicking this button accesses the **Postings** screen (this is where documents scanned into DocuMan™ are held to await indexing into the database). For full details of using this screen see the *Postings* section of the *Other Menu Options* chapter.

Note: whereas the Postings main menu option will only be present when there are scans awaiting processing, using the Postings button allows you to access the Postings screen at any time whether there are scans awaiting processing or not.

Workstation

When clicking this button on a PC that doesn't have a scanner attached, or when using a scanner on the PC for the first time, the following screen will be displayed:

Scanner - If there is a scanner connected to the PC that is to be used by DocuMan™, you **must** set this option to **Yes**. When the **Update** button is clicked then additional facilities will be displayed on the screen (see overleaf). If there isn't a scanner connected to the PC, keep the setting on **No**.

The two additional settings that can be configured in this screen are:

Postings Refresh Period - Set the PC to automatically check with DocuMan™ if any new images have been posted to DocuMan™ from a scanner. The rate is set in seconds and the default setting is 30, meaning the PC will update any new postings every 30 seconds.

Slow Connection - If the PC's connection with the DocuMan™ server is a slow one, click on **Yes** here to allow longer for communications to take place before the operation times out. With a fast connection set this option to **No**.

Any changes made will not be applied until the **Update** button is clicked.

Scanner Configuration

If Yes is selected for Scanner (see above) the screen will have more facilities, an example of the screen that will be displayed is shown overleaf. These are used to configure the scanner to docuMan™.

Once this initial configuration is complete, DocuMan™ will recognize automatically if there is a scanner attached to the PC whenever the PC is used to access the program.

Use this screen to make changes to the scanner configuration whenever required, as detailed overleaf.

Workstation Configuration

Scanner
Is this workstation connected to a scanner   ○ No ⦿ Yes
If this workstation is connected to a scanner, then it will be possible to import new documents into the filing system.

Use Scanner Supplied Interface	⦿ No ○ Yes
Sheet Feeder Attached	⦿ No ○ Yes
Scanner Resolution	100DPI [Resolution ▼]
Scanner Pixel Type	B / W [Pixel Type ▼]

Specify the TWAIN Source to be used for Scanning [Select Source]

General Configuration

Postings Refresh Period	[30]
Slow Connection	⦿ No ○ Yes

[Update]

The scanner configuration options available on this screen are as follows:

Use Scanner Supplied Interface: this is the software supplied with the scanner that provides comprehensive options for each scan that is made. If **Yes** is selected then these options will be displayed for every scan that is made through DocuMan™, allowing a high level of control over each image.

However, when scanning in large quantities of documents this can make the process very time consuming and these options are often unnecessary, so if **No** is selected the images will be scanned automatically to the configuration as set on the DocuMan™ workstation screen here.

It is recommended that this option is normally set to No, except in special circumstances.

Sheet Feeder Attached: if the scanner has a sheet feeder attached, select **Yes**, if it doesn't have a sheetfeeder select **No**.

Scanner Resolution: this allows selection of the dots per inch (DPI) resolution that the documents are scanned in at. DocuMan™ has five DPI options to choose from - 72, 100, 200, 300 and 500.

The higher the level of DPI selected the better quality the scanned image will be, however the size of the file will increase significantly the higher the DPI is set. ***Beware scanning in documents at a higher DPI than is necessary as this will take up a large amount of disk space***.

Scanner Pixel Type: select here the pixel type required for the images to be scanned. DocuMan™ has four types to choose from - black and white (B/W), grayscale, true colour (15 million) and 256 colour.

The size of the file will increase significantly if colour scanning is used. ***Beware scanning in documents at a higher pixel type than is necessary as this will take up a large amount of disk space***.

Warning - Selecting True Colour will create very large files.

Specify the TWAIN Source to be used for Scanning: clicking this button will display a list of the scanner drivers installed on the PC. Select the driver for the scanner to be used with DocuMan™ and click the **Select** button. This procedure *Must* be completed in order for the scanner to be used.

Note: any changes made in the scanner configuration will not be applied until the **Update** button is clicked.

Printer
Clicking this button allows you to select and configure the default printer to be used for printing documents from DocuMan™.

When selecting the Print button from the manipulation tool bar in DocuMan™ (see chapter *Import Document*) documents will be sent straight to the default printer you have selected here.

After clicking on the Printer button two new buttons will be displayed:

Select Printer - This button allows you to select the required printer from the list of available printers set up for the PC. It uses the conventional Windows printer dialog box.

Configure Printer - This button opens up the selected printer's configuration pages to allow you to set up the printer to your requirements. **Note:** the kind of pages displayed here will vary depending on the type of printer you have selected.

Using DocuMan™ - Other Menu Options ─────

Following are details of the remaining options available from the DocuMan™ main menu.

If there are newly scanned images that have been posted to DocuMan™ but have yet to be indexed into the database, then an additional menu option **Postings** will be present as shown below:

Postings   **Import Document**   **Search**   **Utilities**   **Help**

Postings

Clicking on the postings option will display a screen similar to that shown below:

Posting Control

This screen allows images, previously acquired using an Automatic Document Feeder, to be sorted, indexed and recorded into the DocuMan system.

Click on the File Names below to preview the Document and provide all necessary details for indexing.

Document Path	Tag
C:\Scanned_Documents\8884029390000_123099_0.bmp	☐
C:\Scanned_Documents\8884029390000_123099_1.bmp	☐
C:\Scanned_Documents\8884029390000_123099_2.bmp	☐
C:\Scanned_Documents\8884029390001_123099_0.bmp	☐

The Postings option essentially provides a quick method for processing multiple scans that have been placed into DocuMan™ with a sheetfeeder attachment on the scanner.

The list will display all scans that are awaiting processing into DocuMan™. To process the scan click on the file name and the image will open together with the column of tools to manipulate the image and the indexing menu (see the *Import Document* chapter for details on how to use these facilities). Proceed with entering the files into the database as required.

If there are a lot of scans awaiting processing in the Postings option there will be arrows on the right side of the column. Click on the arrows to scroll down the list.

At the bottom of the list are the following two buttons:

To delete a file from the Postings list without indexing it, tick the **Tag** box beside the file no longer required and then click on the **Delete** button. The file will be removed from the list. Select as many files as required.

The **Add to Book** button provides a quick and convenient way to process multiple scans that are to be indexed into the same book. Tick the **Tag** box beside the files that are to be indexed then click on the button to bring up the *Add to New Book* option as detailed in the *Import Document* chapter. All the selected files can be indexed in one procedure using this method.

Help

Clicking on this option will display the DocuMan™ helpfile. This can be accessed at any time while using the program to provide continuous on-line support.

2   Administrator Guide

Installation Information

The following set-up will be required for the Installation of DocuMan™ onto your server:

◆ Microsoft NT Server 4.0 - The Microsoft Service Pack 4 has to be installed to allow the Front Page extensions to work as well as the Management Console for HTTP, SMTP and FTP services.

NT Options Pack 4/Microsoft Internet Information Server/Internet Service Manager is required to manage 1 web-site and 2 FTP sites.

Microsoft Front Page plug-ins.

◆ Microsoft Internet Explorer 5.0 (Tools/Options settings - Refresh After Each Page must be set)

◆ Microsoft SQL Server 6.5 or higher.

◆ The web server should be running from an appropriate sub-directory (for example c:\documan).

◆ The minimum RAM requirement for such an application will depend on the number of users and the size of the database. It is recommended that you start with 192 Mbytes of RAM.

◆ Depending on the number of users, anything from a Pentium 200 MHz onwards is suitable, however the faster the processor the better the response times.

Installation Procedure

1 Install NT Server 4.0 or above on the Server.

2 Install Internet Explorer 5 (version **5.00.2014.02161IC** or higher).

3 Install NT Option Pack 4 on the Server - ensure that **Front Page Server Extensions** (plug-ins) and **Internet Information Server** are selected and installed.

4 Go to **Control Panel** and select **Network**, select **Protocols**, then **TCP/IP Protocols**. Click on **Properties** and enter an IP address, subnet mask and default gateway for the server.

   Click the **Advanced** button and add two more IP addresses and subnet masks, so that your server can respond to its original IP address, a second which will be later used for the scratch e-mail FTP server and a third for ftp access for remote users. Click **OK** to apply the new details.

5 Re-boot the server at this point to ensure that all programs know that the new IP address is available.

6 From the **Start** menu select the path **Programs/Windows NT 4.0 Option Pack/Microsoft Internet Information Server/Internet Service Manager (HTML)**.

7 On the left of the Internet Service Manager screen is displayed a set of options. Select **Web** from the drop-down list and click on **New** to create a new web-site on which DocuMan™ will be located. Enter the name for the web-site and click **OK**. The name will appear on the directory tree on the right of the screen.

   Highlighting the name, select **Properties** from the options on the left of the screen. Assign this web-site with the original IP address assigned to the server in step 4.

   Select **Home Directory** from the options on the left of the screen. The path to the root directory should be displayed here (for example c/InetPub/wwwroot). Ensure that the 6 check boxes underneath this are checked. Save the settings.

8 Using Windows NT Explorer, create a directory called **ScratchEmails** off the root directory of the site that has just been created (normally a path of C:\Inetpub\wwwroot).

9 Now set up a new FTP server (this will only be used for sending scratch e-mail files) by selecting **FTP** from the drop-down list in the Internet Service Manager screen. Selecting **New**, repeat the procedure in step 7 to name

the FTP server which will appear in the directory tree. Again select the **Properties** option from the left side of the screen but this time assign the second IP address that you set up in step 4, below this set the **TCP Port** box to **21**.

Selecting the **Home Directory** option on the left side of the screen, define the home directory of this server to be *ScratchEmails* as defined in step 8 (enter the path into the **Local Path** box).

In the same way set up another FTP server with the third IP address (again enter a TCP port of 21). This will be used as a central storage area so that remote users can access data via FTP.

Select **Security Accounts** from the left screen to disable anonymous log-in. The FTP server defaults to allow anonymous log-in, *uncheck* the **Allow Anonymous Access** and **Allow Only Anonymous Connections** boxes so that you can choose a specific log-in ID and password.

10 Go to the **User Manager** of NT 4 (**Start/Programs/Admin Tools**)and set up users for the scratch e-mail directory and any other directories you have created (for details on using User Manager see the helpfile, accessed from the menu bar at the top of the window). This allows maximum security. This logon and password will then be set up in the DocuMan™ software later on (see the section *FTP & SQL* of the *System Menu* chapter).

11 Install SQL server 6.5 or above – follow the installation instructions supplied with that product.

12 Start the program **SQL Enterprise Manager**, which allows you to create new databases and database objects such as tables. In the **Register Server** dialog box displayed, enter the IP address of the server. Enter the following Log-in ID and Password:

Log-in   SA
Password   Blank

In the **Enterprise Manager** window select the **Manage Databases** button and then click on the **New Database** button. Enter **Documan** for the database name (ensure that in **Database Devices** enough space has

been allocated for the database. Create two devices **DocumanData** and **DocumanLog**).

Enter the size required for the database. The size will depend on the number of documents you want to index (SQL server 7.0+ will not need the size specified), here are some approximate numbers:

120 bytes per document index (on average)

1 million documents require approximately 120Mbytes of index space
10 million documents require 1.2 G-bytes of index space
100 million documents require 12 G-bytes of index space

The maximum number of documents DocuMan™ can index is 2 billion. This number can be increased by using other types of database engines. Other DB engines can be adapted as a custom modification.

Click **Create Now** to create the database.

13 Go to the **Control Panel** (from Start/Settings) and select **ODBC Data Sources** – set up a DSN entry for Documan_DSN on the local SQL server (select the **System DSN** tab rather than the User tab). Select **Localserver SQL**, click **Add** and select **SQL Server**. Click **Finish** and enter the name **Documan_DSN**.

From the *Which SQL server do you want to connect to?* drop-down list select **Local**. In the next dialog box select **With SQL Server Authentication ...** and enter the log-in ID of SA and leave the password blank as set in step 12. Click **Next** until the wizard finishes.

Click the **Test** option to verify that the set-up is good.

Ensure that the SQL database you have created is running.

14 Using Windows Explorer, create a directory called Documan in the root directory of the web server.

Ensure that the explorer is set to show hidden files (select **Folder Options** from the **Tools** menu and choose the **View** tab to check this.

15 Install the DocuMan™ software from the CD provided. Transfer the contents of the **Documan** directory on the CD to the Documan folder in the web server root directory.

Ensure that **fm20.dll** has been registered in the WINNT\SYSTEM32 directory. If it hasn't, place all 3 of the fm20 files into the directory (they can be copied from the **Cabs** directory on the DocuMan CD) and from the DOS Prompt in that directory type:

Regsvr32<space>fm20.dll (a windows message will confirm successful registration).

16 Ensure that the SQL Server, web-site and FTP servers that you have created are all running.

17 Log onto the DocuMan™ web-site (if you have a problem logging on, try entering the IP address with */default.asp*). As it is the first time the system has been run, you will be asked to enter a supervisor logon and password to give you 'master' control of the system. The next screen to be displayed is shown below:

DocuMan Management System

Session ID: 8779448300000

Supervisor Name   [   ]

Password   [   ]

                                     [Create Tables]

Caution !

This may be a first time installation as the Database Table requested does not exist! If you wish to create the Tables press the CREATE button if not inform the systems administrator of this occurance.

Enter the supervisor logon and password and click on the **Create Table** button. The system will create the table structure in the database called Documan, assuming a local SQL server with logon 'sa' and no password (see the following section *DocuMan™ Table Structure* for details of the tables that will be created - note: as the tables are created automatically this will not normally need to be used).

At this point the browser needs to communicate with the database, the set-up script will only be able to create tables if the SQL server is running and the database name (Documan) and DSN (Documan_DSN) are correct. There must be enough space allocated in the SQL database for the tables to be created.

After the tables have been created, the following screen will be displayed (note: all other functions are disabled at this stage):

User and Group Permissions Management
Use this screen to manage the various Users and Groups configured on the Docuras system.

18 At this stage there are no user groups or users set up. To set up the first user follow this procedure:

   (i) Click the **Add** button under Group Management. Assign the group a name.

   (ii) Click on the **Add New User** button under User and Group Association. Enter a user name and password.

      Select **1** from the **Administrator** drop-down box (level 1 gives the user administrator rights - level 0 gives only standard user rights).

      Under the **Group Membership** heading will be listed the group you have just created. Tick the box (important - to allow access to it later).

      Click the **Submit** button to apply the information.

   (iii) Close down Internet Explorer and re-start the program. Enter the name and password set up in (ii) above to enter DocuMan™ again (at this stage this will be the only name and password that will allow access to the system.

19 On entering DocuMan™ this time, the following screen will be automatically displayed:

It is necessary to create the database structure before you can index and retrieve documents.

Click the **Add Department** button and enter the name for a department. The department will appear in a drop-down list under the Department heading.

Click the Add **Category** button to add a category into the department displayed in the drop-down list. Enter a password for use in gaining access to the category if this is required. The category will appear in a drop-down list under the Category heading.

after these procedures have been completed the following screen will be displayed:

When creating new departments each category will need to point to a certain location (either local or ftp) where the document will be stored once indexed. Enter the **Path** to the directory.

Once you have pointed to a new location ensure that you create a directory with that path using Windows Explorer (for full details on setting up departments, categories and paths see the *Database Menu* chapter).

Click the **Update** button to apply the settings.

Add as many departments and categories as required (remember that at this stage all departments and categories you create will be under the group you created in step 18.

Important: this completes the initial installation procedure for DocuMan™. The following chapters detail the menu options available to administrators only for use in managing DocuMan™, including procedures that **Must** be implemented for full and successful operation of the system. ***Please read the following chapters before attempting to use DocuMan™.***

*When using DocuMan™ for the first time Internet Explorer 5 will need to be configured to the specification as detailed in the **Accessing DocuMan™** chapter of the **DocuMan™ User Guide** at the start of this manual. Please read this section the first time you import a document into DocuMan™.*

DocuMan™ Table Structure

The following tables and their respective fields are automatically created on an SQL server to allow DocuMan™ to function correctly. The tables are defined in a file located in the application directory. The name of the file is CreateTables.asp.

Setup for Version 1.2

Note: if this is used for reference, please check that the DocuMan™ table structure here has the same version number as the DocuMan™ software you have installed. If it hasn't, a readme file will be supplied on the DocuMan™ distribution CD or on a separate floppy disk with the correct table structure for your version of the software.

Name of Table	Field Names in Table	Data type	Length	Default
AuditTrail	AuditEntry CopiesPrinted UserID UserName DocumentID Book TrackDate	int int int varchar int int datetime	4 4 4 63 18,0 4 8	
Users	UserID UserName Password Admin	int varchar varchar int	4 255 40 4	 0
BookPages	BookIndex DocumentIndex PageNumber	dec dec int	18,0 18,0 4	
BooksSummary	BookIndex BookTitle CreatedBy CreatedDate	dec varchar varchar datetime	18,0 255 255 8	

Name of Table	Field Names in Table	Data type	Length	Default
	Pages	int	4	
	DepartmentID	int	4	
	CategoryName	varchar	40	
	Description	text	16	
Categories	DepartmentID	int	4	
	CategoryName	varchar	40	
	CategoryPath	varchar	255	
	FTPPath	varchar	255	
	FieldIndex	int	4	
	Password	varchar	40	
Departments	DepartmentID	int	4	
	DepartmentName	varchar	40	
Documents	DocumentID	decimal	18,0	
	DocumentTitle	varchar	255	
	ScannedBy	varchar	40	
	ScanDate	datetime	8	
	ScanPath	varchar	255	
	DepartmentID	int	4	
	CategoryName	varchar	40	
	Description	text	18	
	PrintCount	decimal	18,0	
	SubCategoryID	decimal	18.0	
	SubSubCategoryID	decimal	18.0	
	PartOfBook	int	4	
DTProperties	ID	int	4	
	Objectid	int	4	
	Property	varchar	64	
	Value	varchar	255	
	Ivalue	image	16	
	Version	int	4	(0)

Name of Table	Field Names in Table	Data type	Length	Default
FieldData	DocumentID FieldData FieldID ProfileID	dec varchar int int	18,0 127 4 4	
FieldNames	FieldID ProfileID FieldName FieldPos FieldName049 FieldName033 FieldName081	int int varchar int varchar varchar varchar	4 4 127 4 127 127 127	
FieldProfiles	ProfileID ProfileName ProfilePos ProfileName049 ProfileName033 ProfileName081	int varchar int varchar varchar varchar	4 127 4 127 127 127	
Groups	GroupID GroupName Admin	int varchar int	4 255 4	 (0)
Information Fields	InfoID InfoTitle	int varchar	4 255	
Permissions	GroupID DepartmentID CategoryName	int int varchar	4 4 40	
Scratch	ScratchPath	varchar	255	
ScratchEmails	ScratchPath	varchar	255	

Name of Table	Field Names in Table	Data type	Length	Default
ScratchTable	ImagePath	varchar	255	
SubCategories	SubCategoryID DepartmentID CategoryName SubCategoryName	decimal int varchar varchar	18,0 4 40 40	
SubSubCategories	SubSubCategoryID SubCategoryID SubCategoryName	decimal decimal varchar	18,0 18,0 40	

Configuring DocuMan™ - Database Menu ─────

When entering DocuMan™ for the first time after installation, or later logging in to DocuMan™ as Administrator, the system will allow you to access the supervisor privileges. These are used to configure the program setup to your requirements. Some of the configuration is optional depending on your needs, but **some setup procedures must be implemented** before DocuMan™ can function.

To access the supervisor toolbar click on the **Utilities** option in the DocuMan™ main menu and then click on the **Supervisor** button which is found on the left side of the screen (this button is only displayed when DocuMan™ is accessed in Administrator mode). Across the top of the screen are three sets of menu buttons. The **Database** menu set is shown below:

| Database | Create | Edit | AC Fields | Paths |
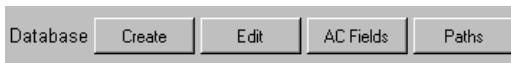
Following is a description of the function of these options.

Create

Use this option to set up your DocuMan™ database. Add departments and categories to provide controlled indexing of documents within DocuMan™.

Creating Tables
The table structure for DocuMan™ is created as part of the installation procedure as previously detailed. It should not normally be necessary to create further tables. ***Extreme caution should be used with clicking on the* Create Tables *option.*** All tables will be recreated in the SQL database - existing tables will not be overwritten, neither will any data of existing tables be affected.

Creating Departments

The Department section is shown below. Click on the drop-down list to display all of the available departments. Click on the **Add Department** button to create a new department and enter in the chosen name. Click **OK** and the department will appear on the list.

```
Department
 ┌──────────────────────────────┐  ▼
 │ AB-Semicon Marketing         │
 └──────────────────────────────┘
                          [ Add Department ]
```

Creating Categories

Once you have created departments, create categories for each of the departments. First select the department required from the Department drop-down list shown above.

The Category section is shown below. Click on the drop-down list to display all of the available categories. Click on the **Add Category** button to create a new category in the department that is currently selected. Enter the name for the category. Click **OK** and Documan™ will give you the option to set a **Password** for access to the category if required. Click **OK** again and the category will appear on the drop-down list.

```
Category
 ┌──────────────────────────┐  ▼
 │ AB-181E - Editorials     │
 └──────────────────────────┘
                    [ Add Category ]
```

Following the on-screen instructions, enter the path to where the documents for this category will be stored.

Important: using Windows Explorer in NT, create directories on the server in a suitable location for each category that you create - the path that will be entered must lead to that directory. Ensure that the correct user rights are set up for those users who will need access to the directories.

When you have finished using the options on this page, click the **Update** button to apply the changes.

Edit

Use this option to rename or delete departments and categories in the DocuMan™ database.

Important: this option should be used with caution - any departments or categories deleted will delete all files located within them.

Selecting this option will display the following screen:

Modify Department / Category
The following Departments are currently available. To delete a Department, check its corresponding Delete box and press the 'Update' button. You can rename a Department by providing a new name and pressing the 'Update' button. To view each department's corresponding categories, click on the Department Name.

Department	New Name	Delete
AB-Semicon Compliance-Board		☐
AB-Semicon Computer Systems		☐
AB-Semicon Inc. Compliance		☐
AB-Semicon Ltd Compliance		☐
AB-Semicon Marketing		☐
AB-Semicon Products		☐
AB-Semicon Projects		☐
AB-Semicon Reports		☐
AB-Semicon Suppliers		☐

This displays a list of all the departments.

To **Rename** a department enter the text into the **New Name** box and click on the **Update** button that is found at the bottom of the screen.

To **Delete** a department tick the **Delete** box alongside the department you wish to remove. Click the **Update** button that is found at the bottom of the screen.

By clicking on the department name itself, a list of the categories set up for that department will be displayed as shown below:

Category	New Name	Access Password	Delete
AB-101E - Editorials			☐
AB101 - Future Features			☐

To **Rename** a category enter the text into the **New Name** box and click on the **Update** button that is found at the bottom of the screen.

To **Delete** a category tick the **Delete** box alongside the category you wish to remove. Click the **Update** button that is found at the bottom of the screen.

To add or change the **Access Password** allocated to the category enter the text into the box. Click the **Update** button that is found at the bottom of the screen.

Creating Sub Categories
By clicking on the category name itself, it is possible to create sub categories within each category if required.

Click on **Click Here** to display the following screen:

Enter the name for the sub category into the **New Sub Category** box and click the **Update** button. The new sub category will appear on the list.

To rename a sub category enter the text into the **New Name** box and click on the **Update** button that is found at the bottom of the screen.

To delete a sub category tick the **Delete** box alongside the sub category you wish to remove. Click the **Update** button that is found at the bottom of the screen.

AC Fields

This option is used only for an Aperture Card database within DocuMan™. Selecting it will display the following screen:

Modify or Add Aperture Card Field Profiles

Select the required Profile from the list below, then make your changes to the Field Names and Field Types and press the UPDATE button for the changes to take effect. Press the ADD button to add a Profile. Press the DELETE button to delete the selected Profile.

| Select Profile | Hubs ▼ | Delete | View |
| Profile Name | | Add Profile | Rename |

Set up profiles and fields for the AC database here. Enter the **Profile Name** into the box and click **Add Profile** to add it to the drop-down list above.

To rename an existing profile, select it from the drop-down list, enter the new name into the Profile Name box and click **Rename**.

To delete an existing profile, select it from the drop-down list and click **Delete**. The profile will be removed from DocuMan™.

To view an existing profile, select it from the drop-down list and click **View**. Below is an example of the screen that will be displayed:

AC - Profile "Hubs"

The following Information Fields are currently available within the Profile "Hubs". To delete a Field, check it's corresponding Delete box and press the 'Update' button. You can rename an existing Field by providing a new name and then pressing the 'Update' button.

| Field Name | | Add Field |

Information Field	New Name	Delete
First Name		☐
ID Number		☐
Reference		☐
		Update

This will display a list of the Information Fields set up for this profile. To create a field for this profile, enter the name into the **Field Name** box and click **Add Field**. The field will be added to the Information Field list.

To change the name of a field, enter the name into the **New Name** box and click the **Update** button. To delete the field check the box alongside the field to be removed and click the Update button.

Paths

Selecting this option will open the **Server Configuration** window. Use this to set up paths for the scanned image holding directory and the email directory as detailed below.

Scratch Directory

If using an automatic sheet feeder it is necessary to create a scratch directory which will hold the temporary scans until they are entered into the DocuMan™ database. This can be created on the PC connected to the scanner. It is recommended that a directory is created called Scanned_Documents using Windows Explorer. Then enter the path into this section as shown below:

Use the **Test** button to make sure that the link is good.

Email Scratch Directory

For the email facility to operate it is necessary to create a scratch email directory in the DocuMan™ directory structure on the web-server that holds DocuMan™ using Windows Explorer. Enter the path into this section as shown below:

Use the **Test** button to make sure that the link is good.

Configuring DocuMan™ - System Menu ⎯⎯⎯⎯

Click on the **Supervisor** button from the **Utilities** main menu option (this button is only displayed when DocuMan™ is accessed in Administrator mode). Across the top of the screen are three sets of menu buttons. The **System** menu set is shown below:

Following is a description of the function of these options.

FTP & SQL

Important: this section will need to be configured to enable management of the database from a remote PC (for example, setting up paths, departments and categories etc.)

Use this option to configure the log-in user name and password for FTP as created during the installation procedure.

The FTP & SQL screen is displayed on the next page. Configure DocuMan™ for FTP as follows:

From the **Select User** drop-down list, select the user required for the FTP access rights (for details of setting up users for DocuMan™ see the *Users* section of the *Housekeeping Menu* chapter). These users should already have been configured on the DocuMan™ server as part of the installation procedure.

Two sets of log-ins and passwords are required, these are for the two FTP servers that were created as part of the initial installation procedure.

Enter the IP addresses for the Index and Scratch E-Mail FTP servers, then give each the log-in name and password to access each server.

Select User accnwley

Index Server | Scratch E-Mail Server

FTP Server   194.70.58.113   FTP Server   ftp,/194.70.58.110/
FTP Logon   ntdocuman   FTP Logon   Administrator
FTP Password ●●●●●●●●●●●   FTP Password ●●●●●●●●

Load Default   Set Default   Update

User Data loaded.

Click the **Update** button to apply your settings.

Use the **Set Default** button to apply the settings as the default configuration.

Any time you need to re-enter the default configuration, simply click the **Load Default** button and the settings will be applied again.

Auditing

Select this option to gain access to a **Document Print Count** record. This enables viewing of a list of all documents that have been printed from DocuMan™ and the number of times that they have been printed.

Diag

Selecting this option allows you to enable the DocuMan™ **Debug** mode. When enabled this will provide information when performing operations within DocuMan™, particularly useful when trying to diagnose a problem - for instance, tracing files that aren't saving to the expected directory.

Configuring DocuMan™ - Housekeeping Menu —

Click on the **Supervisor** button from the **Utilities** main menu option (this button is only displayed when DocuMan™ is accessed in Administrator mode). Across the top of the screen are three sets of menu buttons. The **Housekeeping** menu set is shown below:
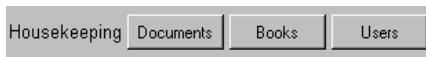
This menu set allows management of the DocuMan™ database, with the ability to view all the documents and books in the database and to set up users with individual access rights, providing a high level of access control as required. Following is a detailed description of the available options.

Documents

Select this option to display the Documan Database Management screen shown below:

Documan Database Management

This management function allows you to look at all documents indexed in a particular Department & Category and see if they are still available and if not allow you to delete the index.

This function must be used with caution as it will also destroy an index to an existing document.

Department: Category:

| NT Accounts 99 ▼ | Customer Invoices ▼ |

| Dead Departments | Document Search |

This option provides access to documents in the database to view or delete them.

Important: as these options have the capability for deleting documents from the database, they should always be used with caution.

From the drop-down lists, select the **Department** and **Category** to be viewed.

Click on the **Document Search** button and a list of the documents in that category will be displayed, as shown below:

Click on the document name to view it. Tick the **Delete** box alongside a document and click on the **Update** button to delete it.

Clicking on the **Dead Departments** button will display a list of files that are not indexed into any current department or category.

In the same way as described above, the documents can be opened for viewing by clicking on their name and deleted by ticking the **Delete** box and clicking the **Update** button.

Books

This option provides access to books in the database to view or delete them and operates in the same way as the *Documents* option previously discussed.

Important: as these options have the capability for deleting books from the database, they should always be used with caution.

From the drop-down lists, select the **Department** and **Category** to be viewed.

Click on the **Search** button and a list of the books in that category will be displayed, as shown below:

Matching Books

Click on a Book Name from the list below to preview. To delete Books, check their corresponding Delete Box and then press the 'Update' button.

Book Title	Edit	Delete
TX-Reports Jan-Feb 2000	Edit	☐
RX Reports Jan-Feb 2000	Edit	☐

Update

Click on the book name to view the documents in it.

Click on **Edit** alongside a book name to amend the details that have been set up for each book.

Tick the **Delete** box alongside a book name and click on the **Update** button to delete that book.

Users

Click on this option to open the **User and Group Permissions Management** window, as shown below:

User and Group Permissions Management
Use this screen to manage the various Users and Groups configured on the Documan system.

Group Management		User and Group Association
	Add	Add New User
	Rename	Modify User
Test	Permissions	Delete User - Group
	Delete	Delete User - System
		administrator

To modify Group Associations of an Existing User, click here

This option provides a comprehensive and highly flexible access management system that enables groups and specific users to be given restricted access to only those categories and departments they need. Full security control of the DocuMan™ database can then be maintained and confidential data can be protected.

Set up the DocuMan™ permissions management as follows:

Group Management

The group management drop-down list will display all management groups you create. Use the buttons to manage the groups and to set which departments and categories each user can access within each group.

Add
Click on this button to create a new management group. Enter the name and click **OK**, the management group will appear in the drop-down list.

Rename
Click on this button if you want to rename a management group. Ensure that the group name you want to change is selected in the drop-down list before selecting this option. Enter the new name and click **OK**. The new name will replace the old name in the drop-down list.

Permissions

This option allows you to set which category can be accessed within each management group. Click the button to display a list of the departments within that group. Click on any department to display the categories for that department. Tick the box beside each category to give permission to access that category. Click on the **Update** button to apply the changes. Repeat the procedure for as many groups as required.

Delete

Click on this button to delete the management group currently selected in the drop-down list.

User and Group Association

The User and Group Association drop-down list will display the names of all the users who have access to DocuMan™. The buttons here can be used to manage which groups each user can access.

Add New User

Click on this button to create a new user to add to the User and Group Association drop-down list. Enter a user/log-in name and a password. From the **Administrator** drop-down list, choose whether you want the user to have standard user rights or administrator rights:

> Select **0** to give the user standard user rights

> Select **1** to give the user administrator rights

Next is displayed a list of the management groups. Tick the box of the groups to be accessible to this specific user. Those groups that are not ticked will not be able to be accessed by the user. Click the **Submit** button to apply the details.

Modify User

Click on this button to change the user details for a specified user. Ensure that the user is selected in the User and Group Association drop-down list. Enter the new details as required (select 1 to give the user administrator rights or 0 for standard user rights). Click the submit button to apply the details.

Delete User - Group
Click on this button to delete a user's access rights to a specific group. Ensure that the correct user is selected in the User and Group Association drop-down list and that the correct group is selected in the Group Management drop-down list.

Delete User - System
Click on this button to delete a user from the DocuMan™ system. Ensure that the correct user is selected in the User and Group Association drop-down list.

To Modify Group Associations of an Existing User Click Here
Select this link to change the groups that an existing user can access. It will open the **Modify User** page. From the Modify User drop-down list select the user whose access rights you want to change. Put a tick in the box alongside each group that the user needs to access, untick the box to restrict access to that group. Set the access rights as required and click the **Submit** button to apply the changes.

Using all these available facilities, set up each user for DocuMan™ as required.