WebDocs Admin Getting Started Guide

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Identifying Requirements for a WebDocs System

Identifying the Requirements

This lesson provides information about the aspects need to be considered while planning for a solution with WebDocs System.

Administering a WebDocs System requires handling tasks like creating projects, groups, users, workflows, automation processes, and managing security. A user needs to have System Administrator rights to perform all these operations.

You need to plan, before implementing a new WebDocs solution. While planning for a new solution, you need to identify and analyze requirements like:

- File structure for the project
- Users to be created
- Roles and responsibilities of the users
- Separators and dividers required

A methodical analysis will help you in determining how many projects needs to be created, their index fields, separators and dividers, and groups required and the rights assigned to the groups.

Overview of Steps to Get Going

Projects, groups, and users are the three basic entities that are required for any WebDocs system.

Creating a Project

A WebDocs project helps you organize and manage documents within WebDocs. To create a project, you need to provide a name for the project and specify the type of that project. You can set configurations to enable or disable various features and functionalities that will be available to the users accessing the project.

Creating a Group

To create a group, you need to provide name for the group and set various configuration to implement security and provide proper rights to the users of that group. You can set configuration to specify, which projects the users will have access to, and what operations they can perform.

Note: You can also assign the user to a group, when you create a user from the **User** dialog box.

Creating a User

To create a user, you need to provide user name, password, and contact information. You also need to set configuration for preferences, security, and assign the user to one or more groups.

Note: You can also assign the user to a group, when you create a group from the **Group** dialog box.

WebDocs creates a default user account â€˜adminâ€™ with System Administrator rights when installed. You can log on to WebDocs as the admin user by specifying â€˜adminâ€™ for user name, and â€˜adminâ€™ for password. You must change the password of the admin user account to enforce security, after you log on to FileBound.

Planning for a New Solution

Planning For A New Solution

Planning is required to analyze the existing setup and understand various requirements that are to be addressed by WebDocs. You need to determine the number of users needs to be created and group for implementing security, workflows for routing documents, and other areas to be managed by the WebDocs solution that you are planning to create.

While planning for a new solution you can discover the scope of one or more projects you need to implement. Planning also helps you determine, how various features and functionalities of WebDocs can be used to satisfy all your requirements.

Identifying the Requirements

Before implementing a new WebDocs solution, you need to identify various requirements like, how many projects, groups, and users need to be created. To understand these requirements, you need to answer questions like:

- How do you want to organize the documents?
  This question helps you determine the file structure of the project. The separators and dividers needed to organize the documents.
- Is there any need for applying security on certain documents?
  This question helps you determine the security to be applied on the separators and dividers.
- How do the users search for a document and what values do they use for searching?
  This question helps you determine what index fields you need to create for the project.
- How many people access the documents?
  This question helps you determine the number of users to be created.
- What access rights the users must have to access the documents?
  This question help you determine the groups to be created and the access rights to be provided to these groups.

Answers to the above questions provide you the basic requirements to get started. You can use the information to set up a WebDocs project.

Deciding the File Structure Method

To meet the solution requirement, you can use any one of the following file structure methods for a WebDocs project.

File based: This file structure is used to hold multiple documents that are part of bigger entity like files, separators, or dividers. You can organize similar documents together by using separators and dividers. For each document you upload, you do not have to apply the same index values. For example, medical records of patient, details of an employee, and so on.

Document based: This file structure focus on individual document containing the pages that make up the document. These documents are not part of a bigger entity. For example, invoices, purchase orders, sales orders, checks, and so on.

What is Required?

Projects, groups, and users are the basic entities required to set up a WebDocs solution.

A Project for Content

A WebDocs project holds the content that is uploaded into the WebDocs system. The WebDocs project contains index fields that allow users search for documents based on the values of the index fields. You can perform indexing on the documents to place the documents at a specific position within a project. Dividers and separators can be used to organize the documents within a project.

A Group for Security

A WebDocs group is a collection of users with similar access rights that allows you to implement security for the WebDocs system. You can assign various rights related to files, documents, dividers, separators, annotations, and workflow to a group. WebDocs allows users to be assigned to one or more groups based on their roles in the projects.

A User for Access

A user can log into WebDocs using correct user name and password to perform operations for which the user has been given rights. A user can perform operations in WebDocs depending on the group the user belongs to.

Methods to Add Content

WebDocs allows users to add content through four different methods:

- Add Content section in website
- Capture
- Importer
- Automation

Add Content Section in Website

Users can upload content from the **Add Content** section of the website. The **Add Content** page allows users to create a new file in any project for which they have proper rights to create new files in. The content can be added to a new file or an existing file, based on the values provided in the index fields.

Capture

Capture is a WebDocs product that can be used to scan, import, and archive pages into a WebDocs project. Users can upload the scanned pages from the Capture to the current project or other projects for the logged on WebDocs server. Capture allows users to scan or import pages using barcodes for breaking and indexing. Users can also scan or import pages offline, without actually logging on to a WebDocs server.

Automation Processes

You can use automation processes to automate the process of importing content to a WebDocs project. The automation processes that can be used to import content are:

- **Social Media Import**: The Social Media Import automation process automatically searches for social media entries for the current date and stores information within a HTML document.
- **Email Import**: The Mail Import process imports emails and attachments from mailboxes including third party mail services like Yahoo, Hotmail, Gmail, Microsoft Exchange, other IMAP and POP3 mail servers.
- **Folder Import**: The Folder Import process automatically import documents that are saved to a network directory watch folder. Imported documents are added to the Indexing Queue.

Importer

Importer is a WebDocs product that monitors the network locations and imports the documents to the WebDocs. Users can run Importer as a service and perform OCR on the documents while uploading the documents. Importer can import XML dataset, parse the files, and import the data to WebDocs. Importer is also useful while migrating from an existing document management system to FileBound.

Example for a Project

Example Project

This chapter demonstrates how to identify various requirements based on a scenario, and use the information to set up a WebDocs solution.

Scenario

MGI Sporting Goods has become a successful sporting goods manufacturer and growing constantly. The increased paperwork is affecting the efficiency and also increased the overhead of maintaining huge amount of documents. The management is looking for a solution that keeps track of documents and implements proper restrictions too.

HR Department

The growing number of applications has increased the time the HR Director spends to ensure the following:

- New hires are given all of the proper paperwork,
- New hires fill out all of the necessary forms,
- Company email account and building access codes are setup correctly
- Direct payroll deposit information is provided to Accounts department on time

Additionally, the HR Director has to deal with increasing amount of paperwork for each employee. It is very important that each employee file contain the all the required documents and maintain a standard structure that allows quick and easy access. Another concern is adhering to the Government regulations for maintaining confidentiality of the employee information.

	Category	Documents Collected and Maintained
Employee Details	Employee Documents	Application
		Compliance Checklist
		Contact Details
		Electronic Consent
		Emergency Contact
		Handbook Receipt
		Interview Checklist
		Receipt of Code of Professional Behavior
		New Hire Questionnaire
		Substance Abuse Policy
	IT Documents	IT Checklist
	Payroll Documents	Payroll Checklist
		Direct Deposit
		W-4

Each employee is required to furnish certain documents that are maintained by the HR department. These documents are categorized into employee documents, IT documents, and payroll documents

The table above mentions the documents maintained by HR department for all the employees

Physical copies of all the documents mentioned in the table above are maintained in a physical file. HR department maintains separate files for each employee.

Accounts Department

The Accounts department handles all financial activities of the company. It is responsible for processing incoming invoices, sales order, and salaries of the employees. Recently the company started facing problems when it comes to processing incoming invoices in timely manner. The department managers are distributed out across different locations and this is contributing to the untimely processing of the invoices, as emails are sent between offices for approval. Additionally, the accounts department has to review sales orders before fulfilling the orders and access compensation details of all the employees.

The Accounts Department maintains physical copies of the following documents:

- Purchase Orders
- Sales Orders
- Invoices

The documents related to purchase order, sales order, invoice, and vendor details are maintained in separate physical files. All of the employees in the Accounts department can access the documents.

Basic Discovery Information

Based on the requirement of HR and Accounts departments, you can identify various requirements like:

- Projects, groups, and users to be created
- Configuration to be set for the projects
- Features and functionalities available to the users
- Configuration to be set for the groups

Using a Suitable File Structure

HR department maintains multiple documents for each employee in different categories. Therefore, file based structure is suitable.

Accounts department maintains single documents for each invoice, purchase order, and sales order. Therefore, document based structure is suitable.

Projects to be Created

You can create as many projects you need as per your requirements. You can manage all the documents within a single project or you can create multiple projects to manage the documents separately.

For this scenario, we will create a single project to manage employee documents and three projects to manage accounts related documents.

Note: The maximum number of file you can create and document you can upload depends on the license you have obtained.

Index Fields to be Created

Index fields are the attributes of the documents that are maintained with the WebDocs system. Users can search for documents within WebDocs using the index fields.

Attributes used for searching documents Employees of the HR department search for documents using the following attributes:

- Last Name
- Employee ID
- Department

Documents	Attributes
Purchase Order	Purchase Order Number
	Purchase Order Amount
	Vendor
Sales Order	Sales Order Number
	Date
Invoice	Invoice Number
	Invoice Date
	Invoice Amount

The table above lists the attributes the employees of the Accounts department use to search documents.

The attributes used for searching documents help you determine the index fields to be created for each project.

Listing Group Access Needs

Access to these documents is provided to employees based on the department they belong to and position they hold in the company. You need to identify the restrictions required to be implemented and the access required for users to carry out the tasks they are responsible for.

Documents	Manager, HR Department	Employee, HR Department	Manager, Accounts Department	Employee, Accounts Department	Employee, IT Department
Employee Documents	Yes	Yes	No	No	No
IT Documents	No	No	No	No	Yes
Payroll	Yes	No	Yes	No	No
Purchase Order	No	No	Yes	Yes	No
Sales Order	No	No	Yes	Yes	No
Invoice	No	No	Yes	Yes	No

The table above represents the restrictions implemented for accessing the employee documents and accounts documents.

Following conclusion may be deduced from the above table:

- Only managers and employees from HR department can access employee documents.
- Only employees from IT department can access IT documents of employees.
- Only managers of HR and Accounts department can access Payroll documents of employees.
- Only managers and employees from Account department can access documents related to purchase order, sales order, and invoice.

Access to Projects for Various Groups

Based on the conclusion, four groups are required to satisfy the requirements. The table above gives information about the groups, their users, and the configuration to be set for each group.

Group Name	Users Assigned to the Group	Project Assigned	Rights to Access Documents
HR	Managers and employees of HR department	HR - Employee	Employee Documents
IT	Employees of IT department	HR - Employee	IT Documents
Accounts	Employees of Accounts department	• Purchase Order • Sales Order • Invoice	• Purchase Order • Sales Order • Invoice
Manager	Managers of HR department and Accounts department	HR - Employee	Payroll Documents

Listing Users Needed

The users are the people in the organization that can log on to the WebDocs system and perform the operations they are responsible for. All the employees of HR department and Accounts department need to log on to WebDocs system to manage documents. Therefore, you need to create user name and password for all the employees.

People Working in the HR Department

The table above lists the employees in the HR department and the position they hold.

Name	Position
Morgan Darwin	Manager
John Willies	Manager
Brandon Smith	Senior Associate
Julia Holmes	Senior Associate
Martha Wales	Associate
Pam Banks	Associate

People Working in the Accounts Department

The table above lists the employees in the Accounts department and the position they hold.

Name	Position
George Morrison	Manager
Marian Bake	Manager
Suzan Clark	Senior Accountant
Ivan Rodriguez	Senior Accountant
Jonathan Black	Senior Accountant
Mike Turner	Accountant
Jennifer Louise	Accountant
Richard Johnson	Tax Consultant
Paul Harris	Trainee
Robert Taylor	Trainee

First Logon

Logging on for the First Time

When you log on to WebDocs, your access to WebDocs depends on the following factors:

- Global settings of WebDocs
- Project settings
- Group settings
- User settings

You can work with one or more projects, files, documents using the Viewer. You can scan documents, participate in work-flow activities, use E-forms, and perform other tasks, based on the settings listed above.

Installing the WebDocs Viewer Launcher

The WebDocs **Viewer Launcher** must be installed on the computer that you are using, to access the **Viewer**. If the WebDocs **Viewer Launcher** is not installed, then a dialog box displays relevant messages when you try to view a document for a file. You will need to have the proper rights to install a .exe file on the computer that you are using. If the installation fails please contact a network system administrator.

The first time you click a link to launch the document viewer to view a document you will be prompted to install the WebDocs **Viewer Launcher**. Once the WebDocs **Viewer Launcher** is installed you will not be prompted again when trying to view a document.

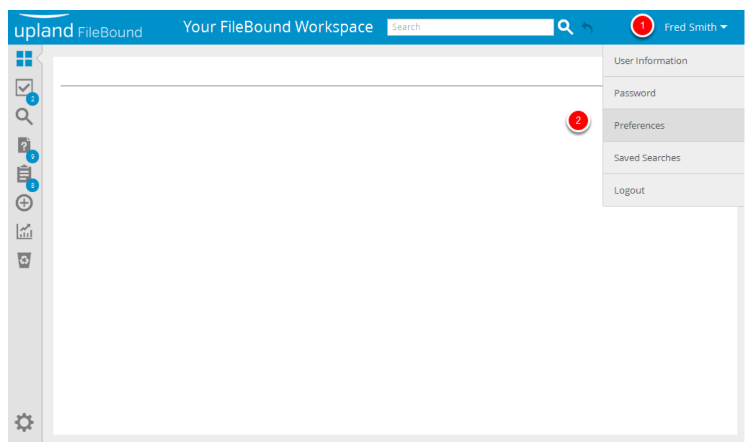
Note: If you are a System Administrator you will also be prompted to install the **Viewer Launcher** when you try to launch the WebDocs **Central Administration** console for the first time before trying to view a document in the Viewer.

This lesson shows you how to install the WebDocs **Viewer Launcher**.

1. Open the Preferences Page

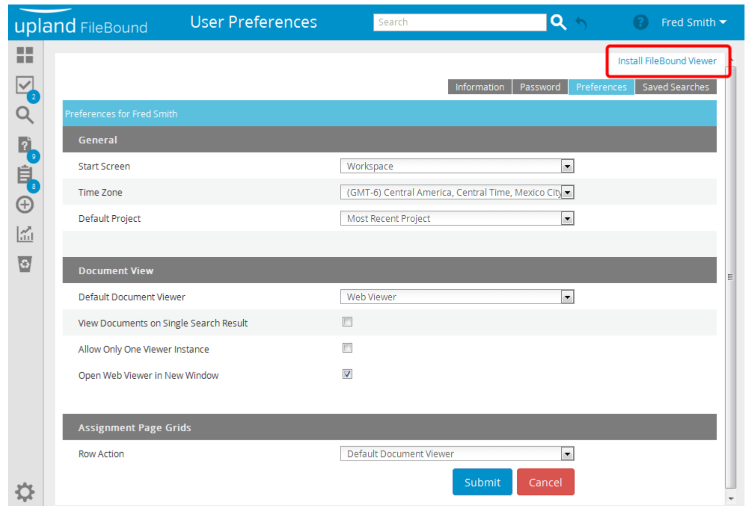
1. Hover the mouse pointer over the user name on the toolbar.
2. Click **Preferences** from the menu.
   The **Preferences** tab opens within the **User Preferences** page.

Note: You can also click **User Information**, **Password**, or **Saved Searches** from the menu.



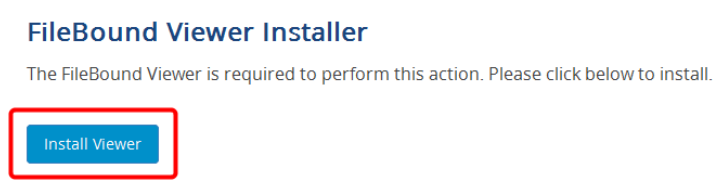
2. **Open the** WebDocs **Viewer Installer Dialog Box**

- Click the **Install** WebDocs **Viewer** link.
  The WebDocs **Viewer Installer** dialog box opens.



3. **Click Install Viewer**

- Click **Install Viewer** within the WebDocs **Viewer Installer** dialog box, to install the viewer.



Adding a Project

How to add a project?

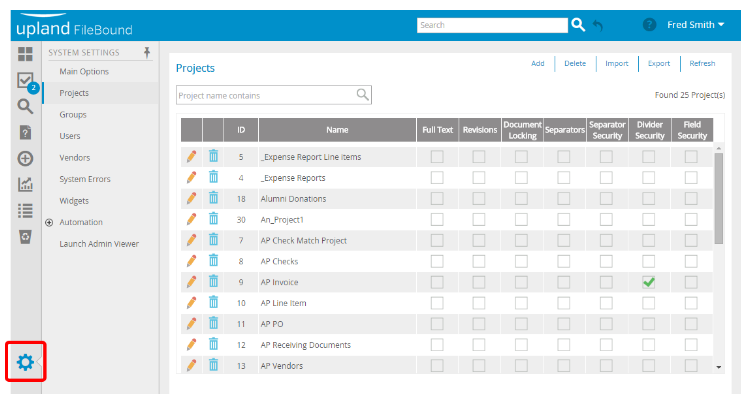
When you start to create a new project it is necessary to understand the scope of what the project is going to be used for. This includes the type of documents that will be stored within the project, the index fields, or meta-data, that will be used for searching and any possible security that might need to be imposed.

Note: When creating project it is important that it is configured, so that files will not contain more that 200 pages each. It is not recommended to place more than 200 pages within a single file. This number is dependent on the amount of memory installed on the client PC running the **Viewer**.

This lesson shows you how to add a new project in WebDocs.

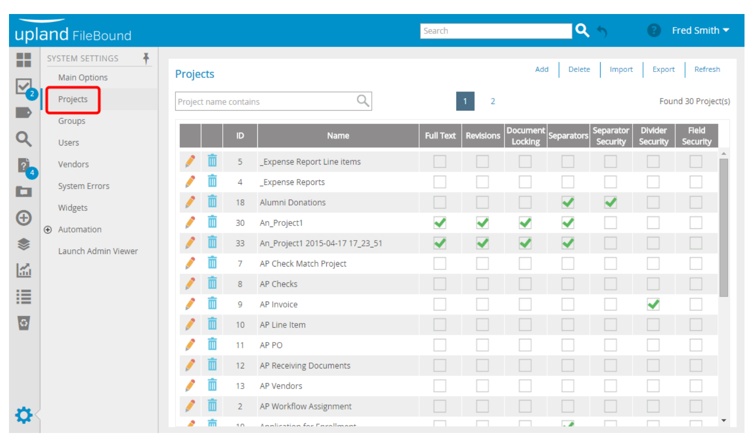
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



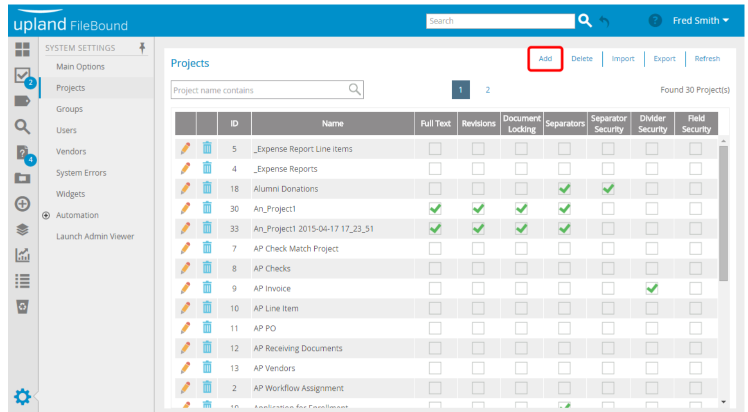
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



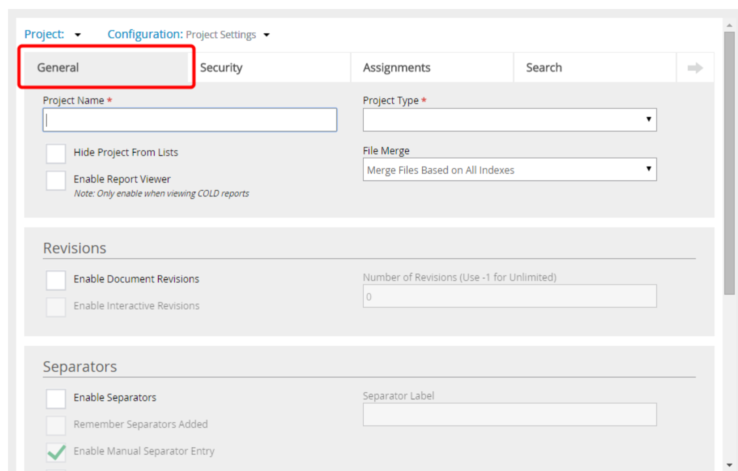
3. Open Project Configuration Page

- Click **Add** on the toolbar.
  The project configuration page appears.



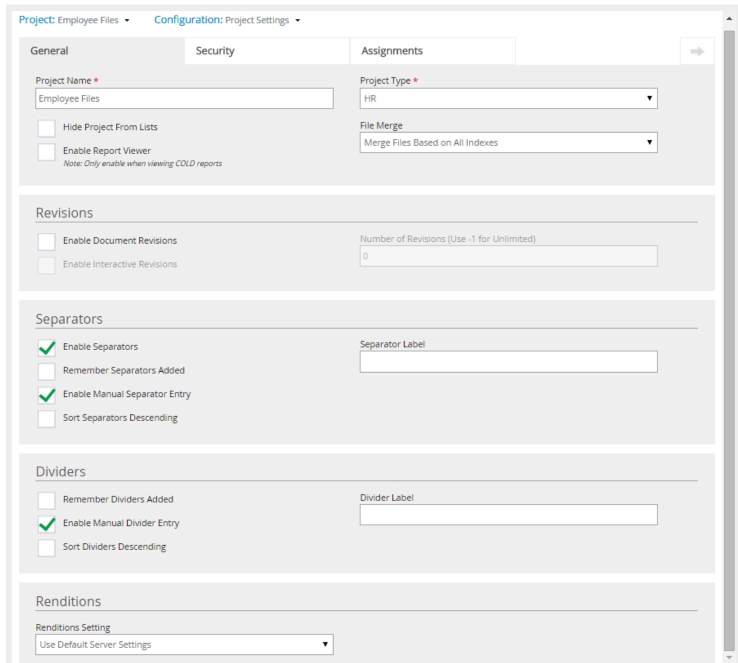
4. Specify the Project Information

1. You can click on the various tabs to specify properties for the project.
2. Click **Save** on the toolbar.



4.1 General Tab

Project Name: This option allows you to specify a name for the project.



Project Type: This option allows you to select a project type. The project type helps administrators to identify the type of a project. Selecting a project type does not impact other configurations of a project.
Following project types are available:

- Accounts Payable
- Accounts Receivable
- Collections
- Contracts Management
- HR
- Loan Processing
- Medical Records
- Other
  You can select Other, to specify the project type that is not available in the list.

File Merge: This option allows you to specify that action to be taken on the new content added to the WebDocs.

Hide Project From Lists: This option allows you to prevent the project being displayed in the lists.

Enable Report Viewer: This option allows you to enable the report viewer for the project.

Enable Document Revisioning: This option allow users to create new version of a document, when it is saved in the **Viewer**.

Number of Revisions: This option allows you to specify the maximum number of version that can be created, to limit the creation of new version of a document when it is saved. You can specify -1 to allow creation of unlimited version of a document.
Note: This option is associated with the **Enable Document Revisioning** option.

Enable Interactive Revisions: This option allow users to add a change description note while saving a document within the **Viewer**.
Note: WebDocs opens the **Document Description** dialog box to add the change note.

Enable Separators: This option enables separator level for the project.

Remember Separators Added: This option saves the newly added separators and allow users to select a separator name from the list of separators, instead of typing the separator name.

Enable Manual Separator Entry: This option allow users to add new separators when documents are scanned into WebDocs.

Sort Separator Descending: This option allows you to sort the list of separators displayed in the **Viewer** in reverse alphabetical order.

Separator Label: This option allows you to specify a label that will be displayed on the **Search** page instead of 'Separator'.

Remember Dividers Added: This option saves the newly added dividers and allow users to select a divider name from the list of dividers, instead of typing the separator name.

Enable Manual Divider Entry: This option allow users to add new dividers when documents are scanned into WebDocs.

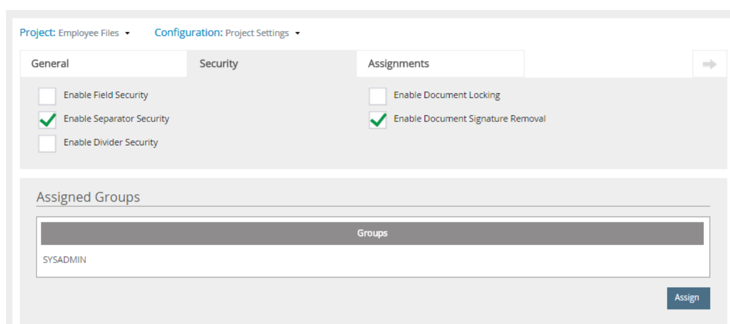
Divider Label: This option allows you to specify a label that will be displayed on the **Search** page instead of 'Divider'. **Sort Divider Descending**: This option allows you to sort the list of dividers displayed in the **Viewer** in reverse alphabetical order.

Rendition Setting: This list allows you to select an option for rendition.

Following options are available:

- **Use Default Server Settings**: This option uses the global server settings as configures by the System Administrator in the **Main Options** dialog box.
- **When Document is Uploaded**: This option creates rendition when a Microsoft Word, Adobe Acrobat, or Microsoft Excel document is uploaded.
- **When Page is Viewed**: This option creates rendition when a Microsoft Word, Adobe Acrobat, or Microsoft Excel document is viewed in a **Viewer**.
- **During Scheduled Job**: This option creates rendition when a Microsoft Word, Adobe Acrobat, or Microsoft Excel documents are included in a scheduled job.

4.2 Security Tab



Enable Field Security: This option allows you to implement restriction on access to the index fields of the project.

Enable Separator Security: This option allows you to implement restriction on access to the separators within the project.

Enable Divider Security: This option allows you to implement restriction on access to the dividers within the project.

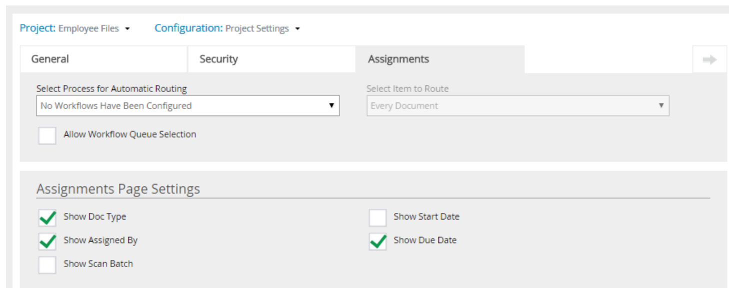
Enable Document Locking: This option allow users to lock a document from the **Viewer**. The locked document can be updated only by the user who has locked it.

Enable Document Signature Removal**: This option allow users to remove signature of a document from the **Viewer**.

You can assign groups to a project by adding one or more groups to the project. Users of the groups assigned to the project can access the project.

Note: You can also assign projects to a group. For information on assigning projects to a group, click here.

4.3 Assignments Tab



Select Process for Automatic Routing: This option allow users to route project documents to the selected workflow process.

Select Item to Route: This option allows you to specify what documents will be sent into workflow.

Allow Workflow Queue Selection: This option allows you to specify whether a user can select a workflow step for processing document, if the user is assigned to multiple workflow steps.

Show Doc Type: This option displays name of the divider a document belongs to.

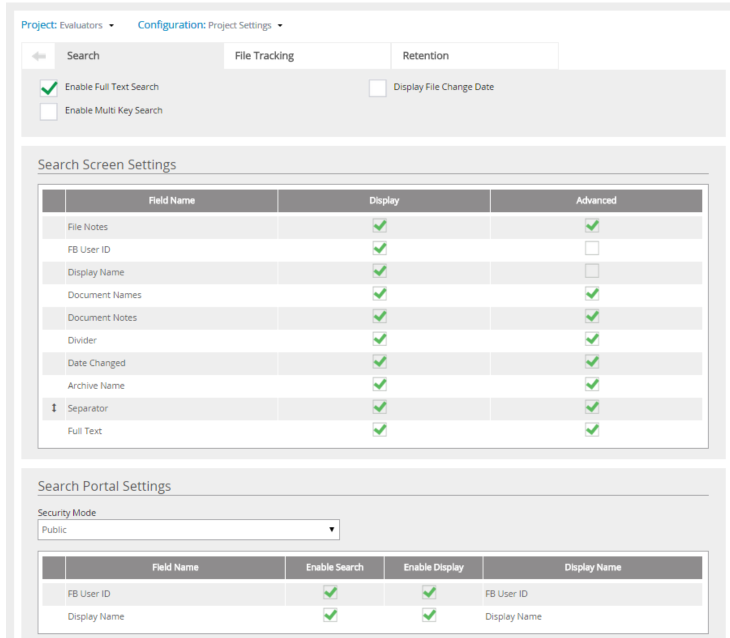
Show Assigned By: This option displays name of the user that has assigned the document.

Show Start Date: This option displays the date when the document was routed.

Show Due Date: This option displays the due date for completing an assignment.

Show Scan Batch: This option displays the date when the batch was scanned using the Capture.

4.4 Search Tab



Enable Full Text Search: This option allow users to search for full text OCR information within the **Search** page.
Note: Documents must contain proper OCR information, to be able to use full text search.

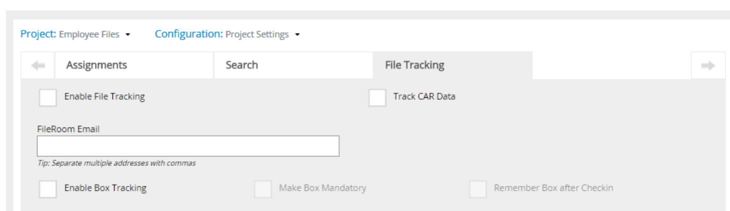
Enable Multi-Key Search: This option allow users to perform search based on multiple values. The search is performed on the key field of a project and is commonly used with physical file tracking projects.

Display File Change Date: This option displays the date and time of the last update of each file in the **Search Results** page.
Note: If a file is not changed within WebDocs, the date and time the file was created, is displayed.

Search Screen Settings: This section allow users to specify the fields that will be displayed in the search result and available for advanced search.

Search Portal Settings: This section allow users to specify security mode, fields that will be available for search and fields that will be displayed in the search result, and specify display name for a field.

4.5 File Tracking Tab



Enable File Tracking: This option allow users to perform file tracking related functions.

Track CAR Data: This option allow users to view the details of micro films and microfiche data; such as roll number, frame number within the CAR tab of File Detail page.

FileRoom Email: This option allow users to specify email address of a file room.

Enable Box Tracking: This option allow users to perform box tracking while performing file check-in or check-out functionality. It also enables the Box Search sub-menu in the Search menu in WebDocs.

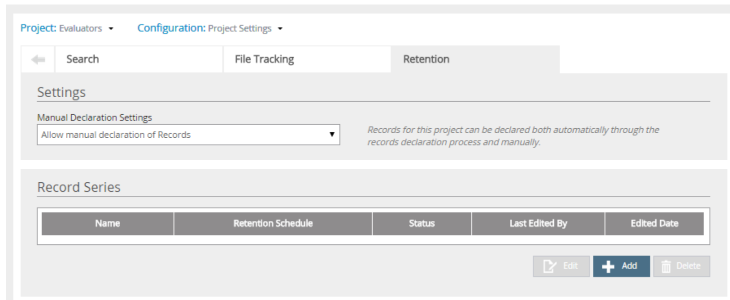
Make Box Mandatory: This option makes it mandatory for a user to assign box number while creating a new file.

Remember Box after Checkin: This option allows the system to remember what box the file is originally checked out to.

4.6 Retention Tab

Settings: The list allow users to specify retention setting for the project.

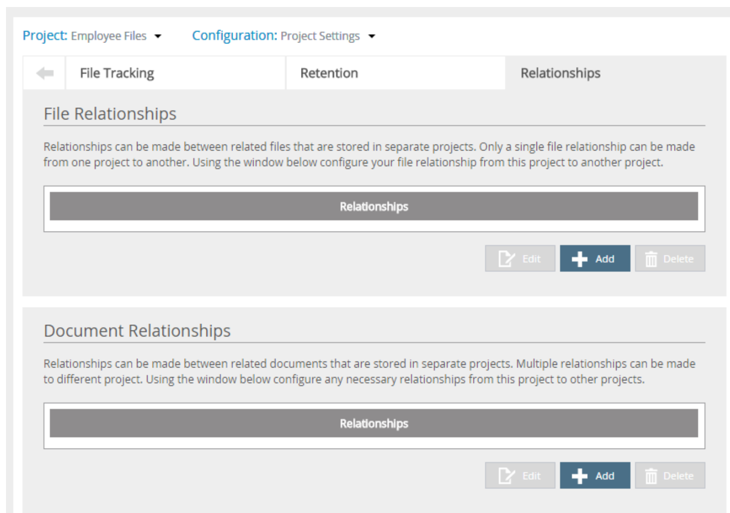
Record Series: This section allow users to manage the record series for the project.



4.7 Relationship Tab

File Relationships: This section allow users to establish relationship between two projects.

Document Relationships: This section allow users to establish relationship between documents.

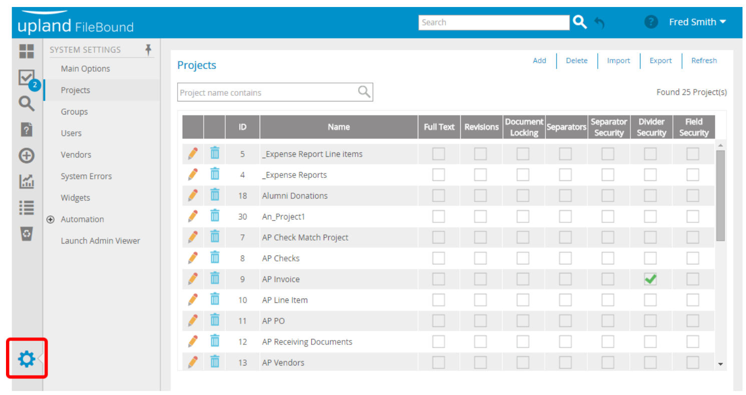


How do I add a new index field?

You can add index fields to a project one at a time, or you can add multiple index fields to a project at a time. In both cases, you must configure the index field or index fields after you have added the index fields to a project. This lesson shows you how to add a new index field.

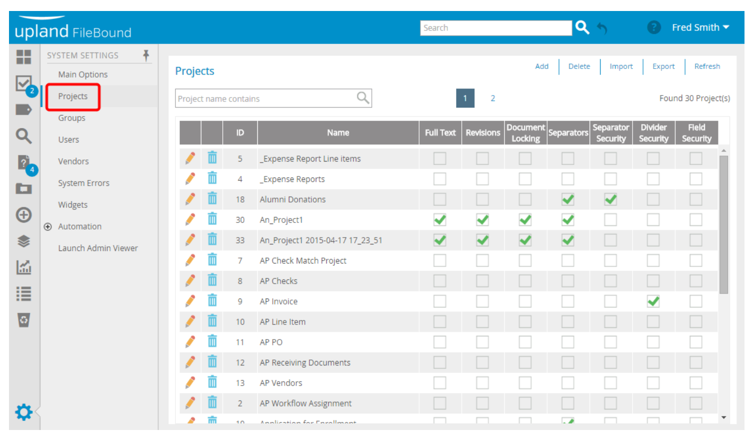
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



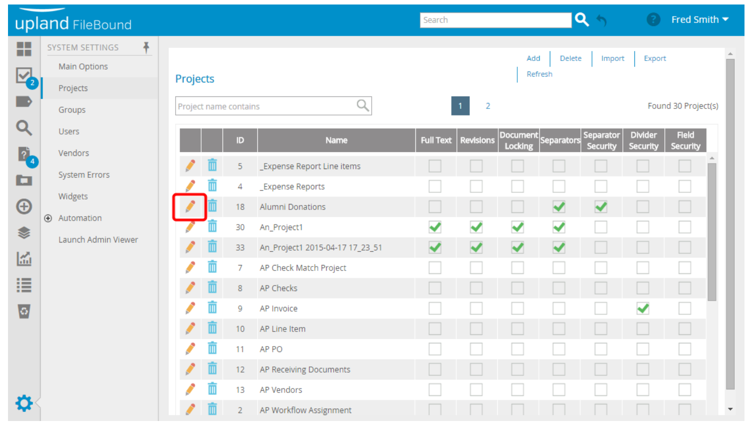
2. Click Projects

- Click **Projects**. The **Projects** page appears.



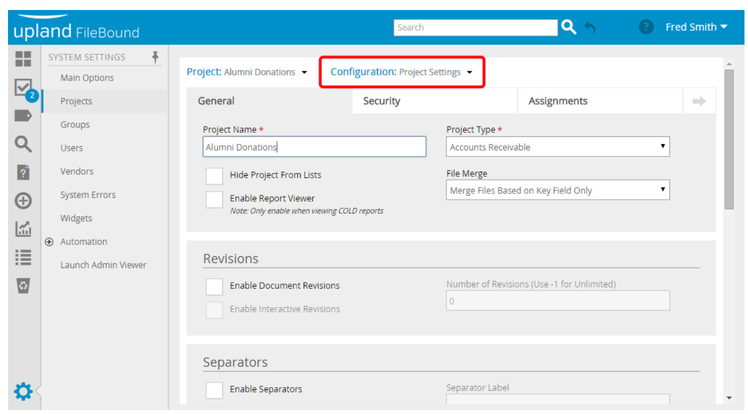
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



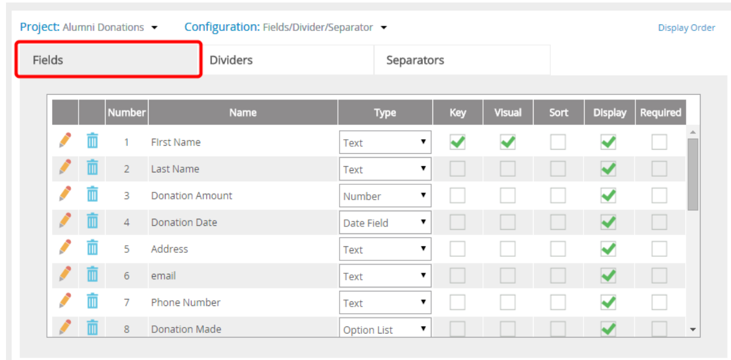
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



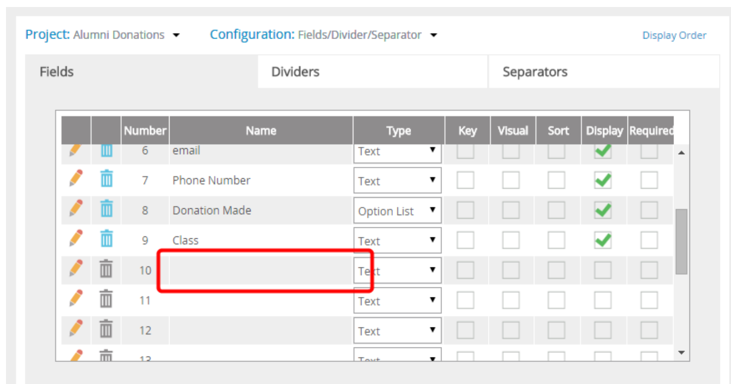
5. Click the Fields Tab

- Click the **Fields** tab.
  The available index fields for the selected project are displayed.



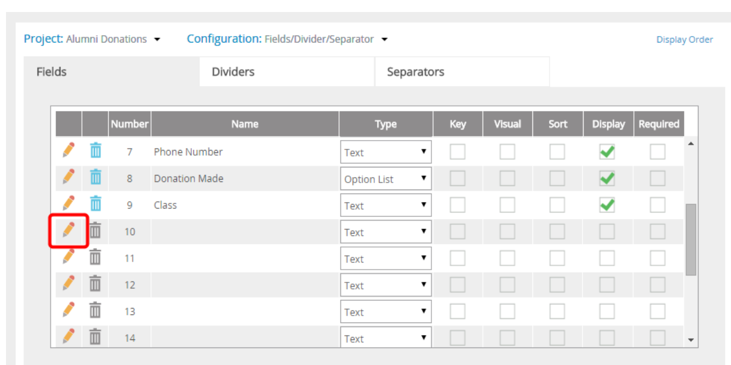
6. Select an Index Field

- Select an empty or unassigned index field.
  Note: You can have a maximum of twenty index fields in a project.



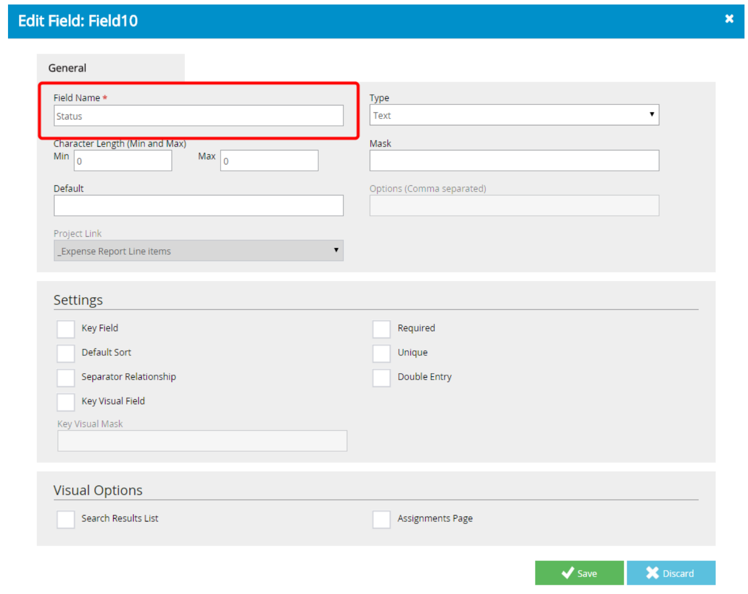
7. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the index.
  The **Edit Field** dialog box opens.



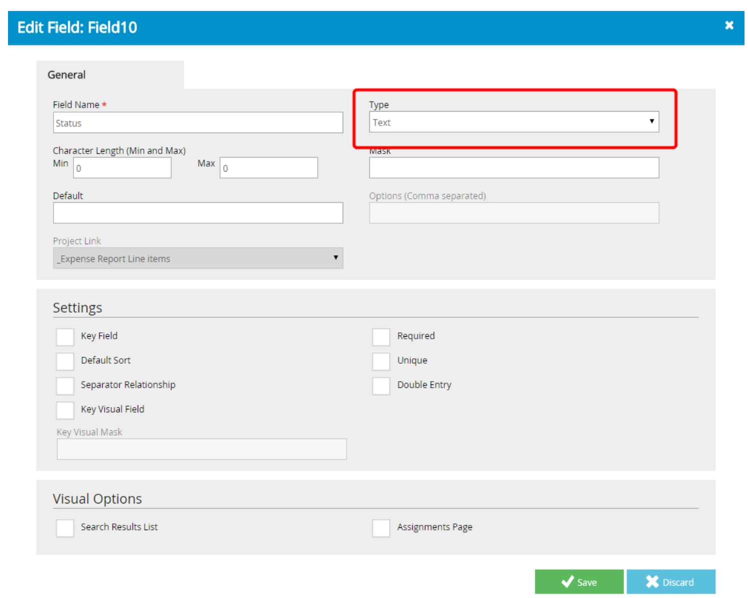
8. Specify a Name for the Index Field

- Specify a name for the index field in the **Field Name** box.



9. Select the Data Type

- Select the type of the index field from the **Type** list.
  The following options are available:
    - **Text**: Contains alphanumeric characters that are not used for calculations.
    - **Number**: Contains numeric values, plus symbol characters, and minus symbol character only. The number type can be used for calculations.
    - **Date Field**: Contains a date. Displays a calendar control for selecting the date in the index field.
    - **Terminal Digit**: It is a method of filing that bases the order of the files on two digit number groups from right to left. For example, if you were to find a file with an account number of 12345 you

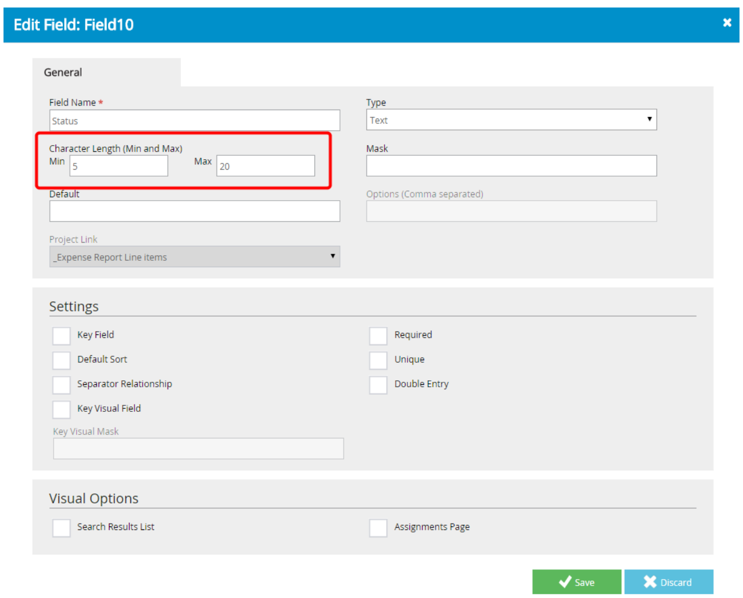


would break the number into groups of two from right to left 1-23-45. You would first look for the 45 grouping then 23, then 1.

- **Auto-Counter**: Contains a number that gets incremented by 1 with every new file entry.
- **Option List**: Contains a list of values for the index field. A list is displayed for the index field, from which a value can be selected. The optional values can be specified in the **Options** box separated by commas.
  Note: You can paste a list of options from an excel or a text file into the **Options** box.
  Version Note: The ability to paste a list of options from an excel or a text file is not available in the versions earlier to 7.2.5.
- **Auto-Text**: Contains alphanumeric characters that begin with alphabets and end with numeric characters. The numeric characters part gets incremented by 1 with every new file entry.
- **Project Link**: Contains a list of key values from a linked project. You can link a project to the index field by specifying it on the **Project Link** list.

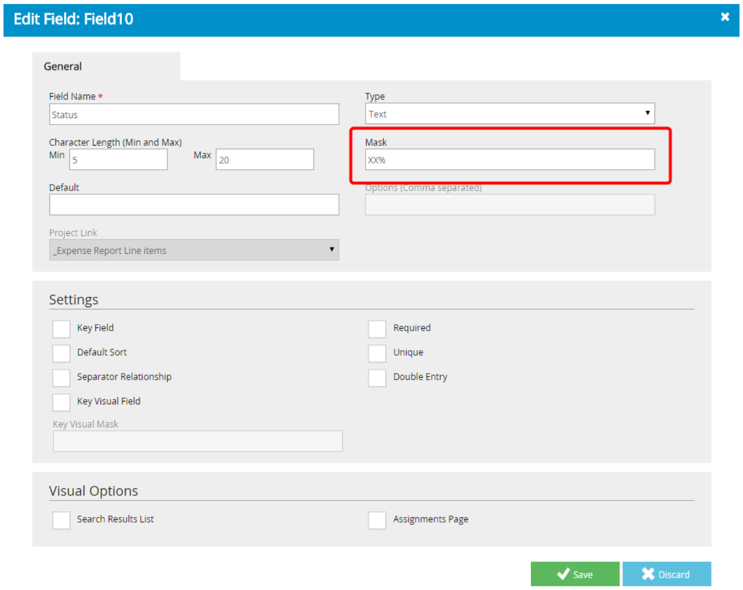
10. Specify a Range for the Index Field

- Specify a minimum, and a maximum length in the **Character Length** boxes for the value to be entered in the index field.
  If the number of characters typed in the index field is less than the minimum length specified, or more than the maximum length specified, then, a message is displayed.
  By default, the **Character Length** boxes contain zeroes, meaning no minimum or maximum lengths are specified for the value to be entered in the index field.



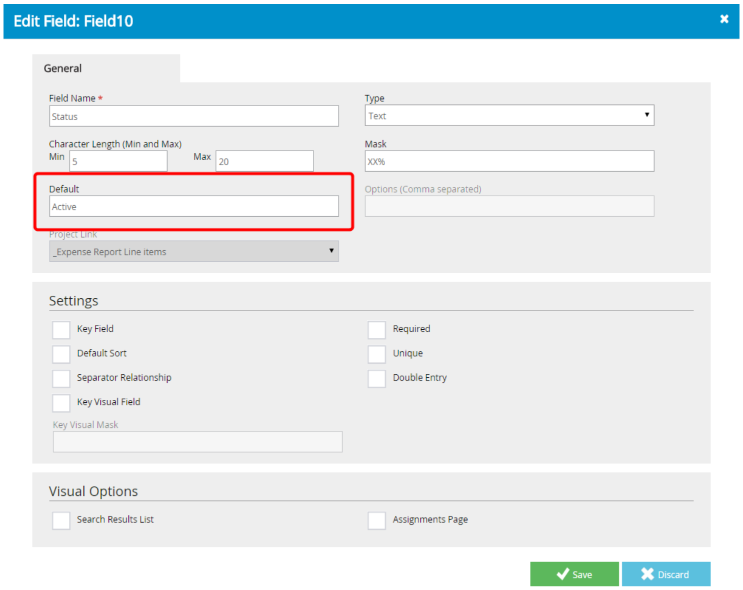
11. Specify a Mask

- You can specify how to display an index field in the **Mask** box.
  - Use 'X' to specify alphanumeric values in the mask.
  - Use '#' to specify numeric values in the mask.
  - Use '?' to specify values of any type in the mask.
  - Use '$' to apply the dollar sign, appropriate comas, and the decimal points to a numeric field or text field. **Note**: The **Mask** box displays a list of date formats for a date type index field.



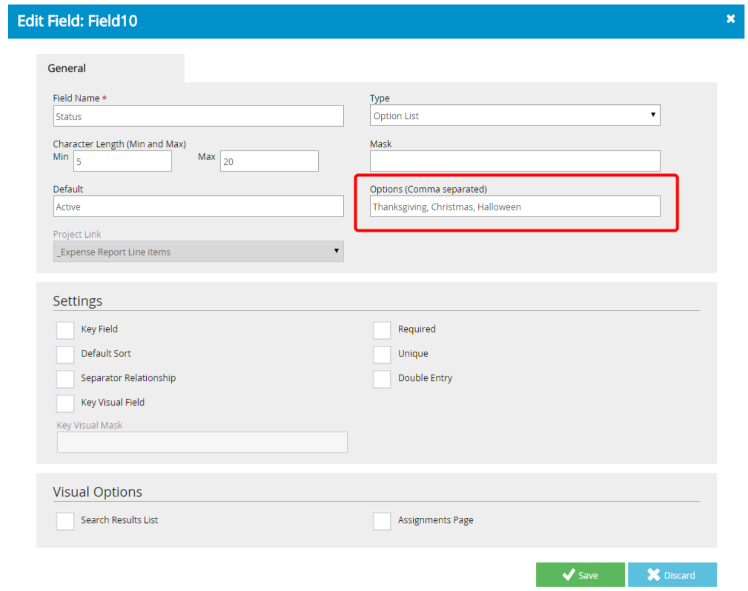
12. Specify a Default Value

- You can specify a default value for the index field in the **Default** box used during file entry. For example, specify $$DATE$$ in the **Default** box to assign the current date as a default value to the date type index field.



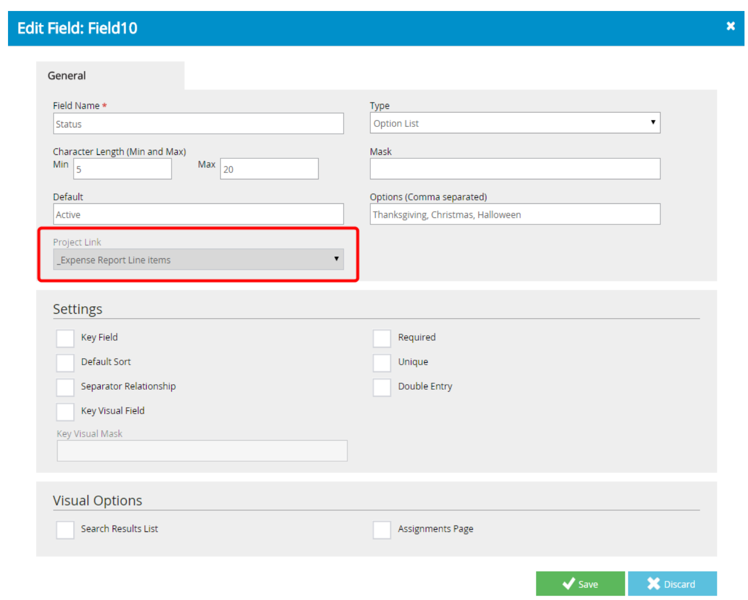
13. Select an Option

- You can specify the optional values for a list type index field in the **Options** box, separated by commas.
  Note: The **Options** box is enabled when **Option List** is selected from the **Type** list.



14. Select a Project

1. Select a project from the **Project Link** list to display the key fields of the selected project in a list for the index field.
   Note: The **Project Link** list is enabled when **Project Link** is selected from the **Type** list.
2. Click **Save** to confirm.

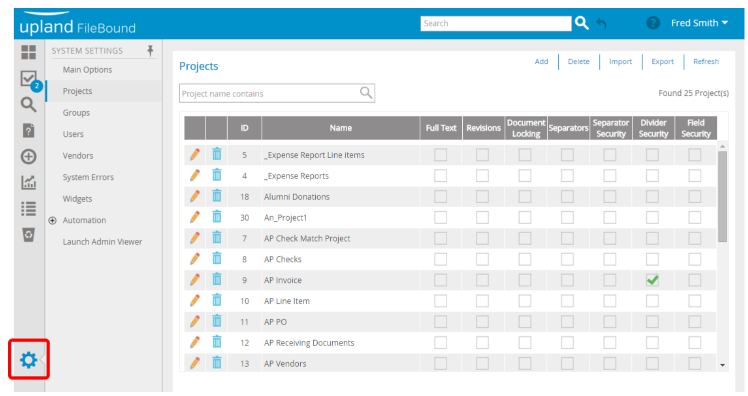


How do I set an index field as the key field for the project?

The key field is required to match and merge files from other applications into the WebDocs project. This lesson shows you how to set an index field as the key field for a project.

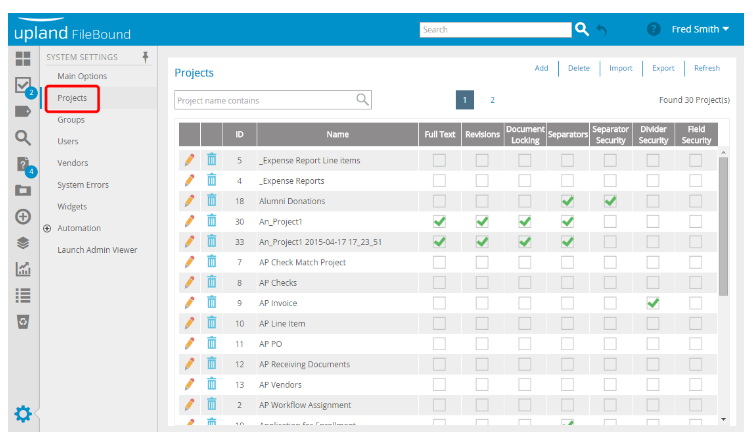
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



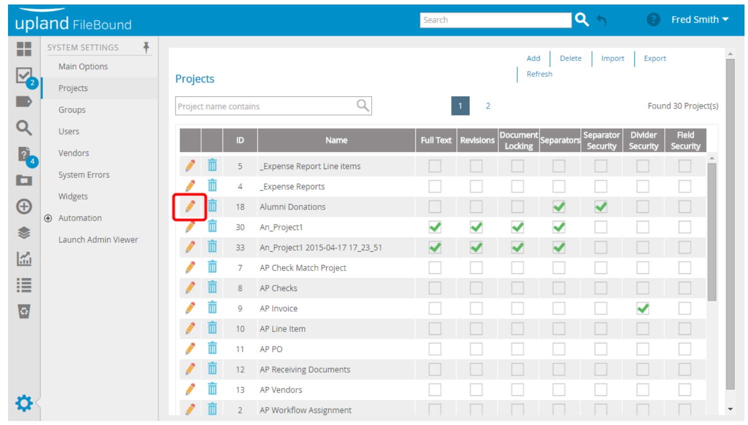
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



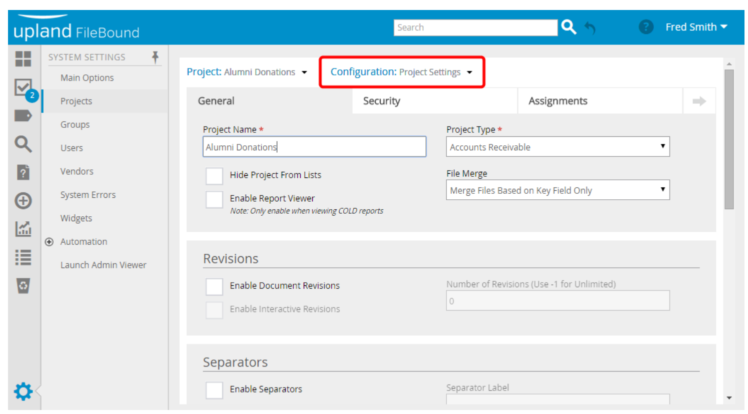
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



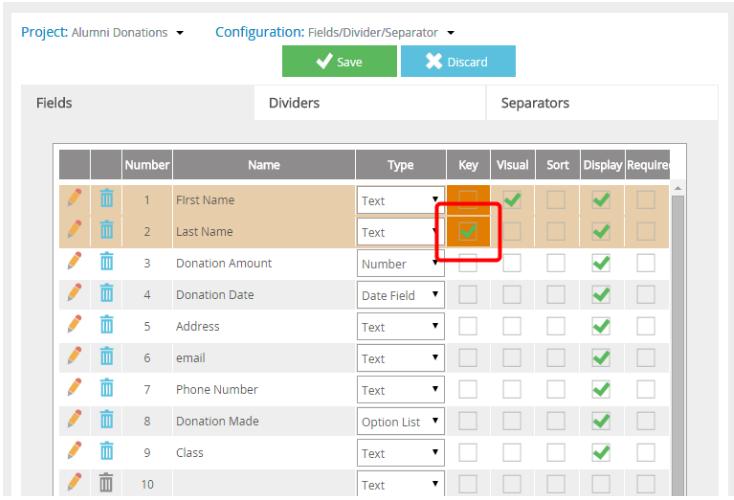
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Select the Key Check Box

1. Click the **Fields** tab.
2. Select the check box under the **Key** column to set the index field as the key field for the project. **Note**: You can set only a single index field as the key field.
3. Click **Save** on the toolbar.

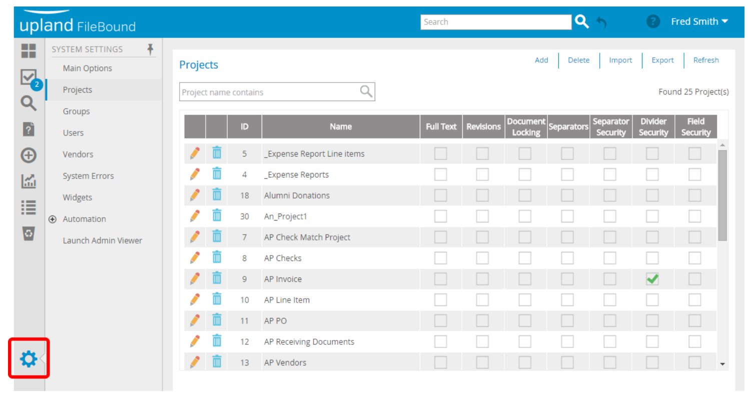


How do I prevent an index field from being displayed in the search results?

This lesson shows you how to prevent an index field from being displayed in the search results.

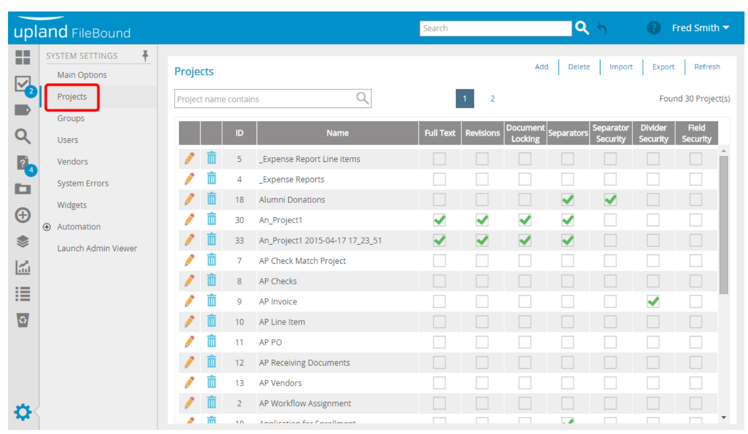
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



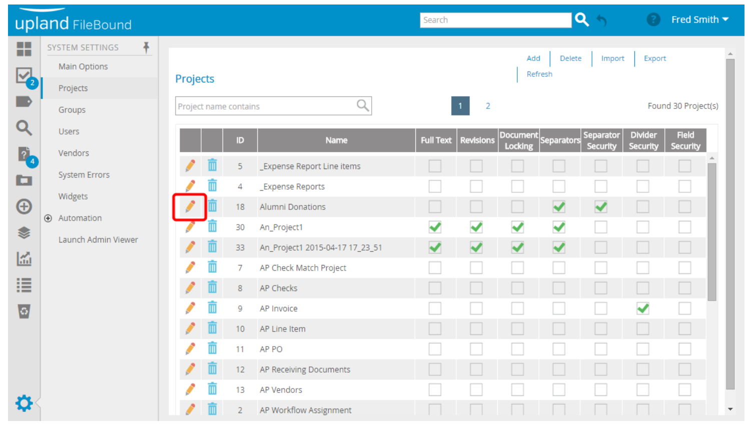
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



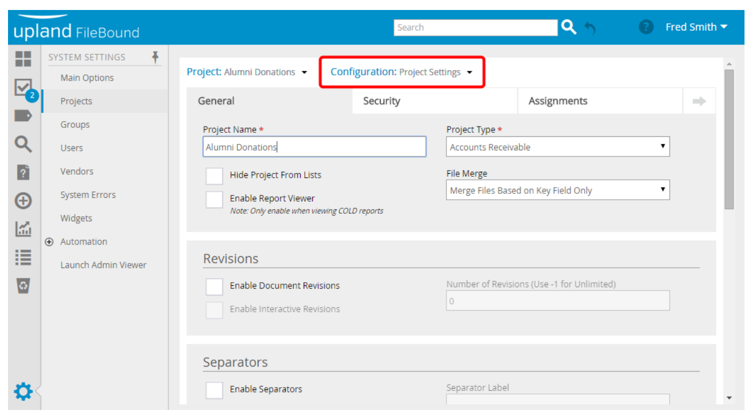
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



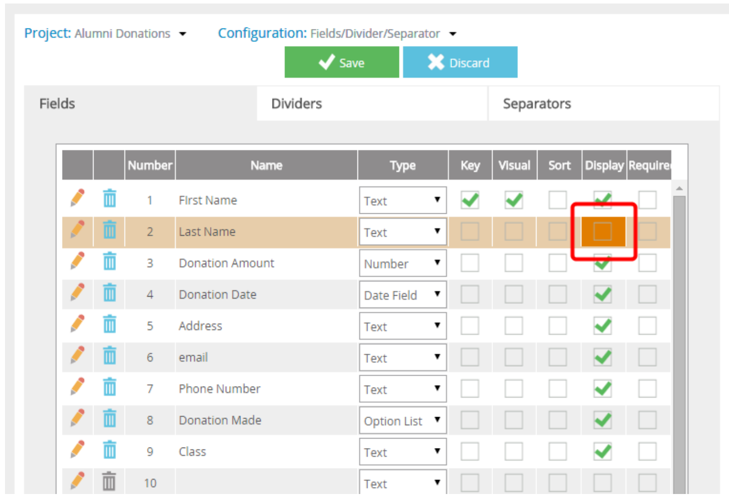
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Clear the Display Check Box

1. Click the **Fields** tab.
2. Clear the **Display** check box to exclude the selected index field from the search results.
3. Click **Save** on the toolbar.

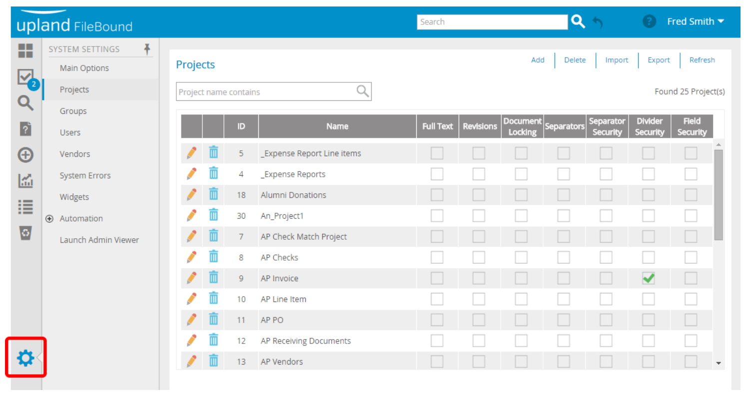


How do I make an index field mandatory?

This lesson shows you how to make an index field mandatory.

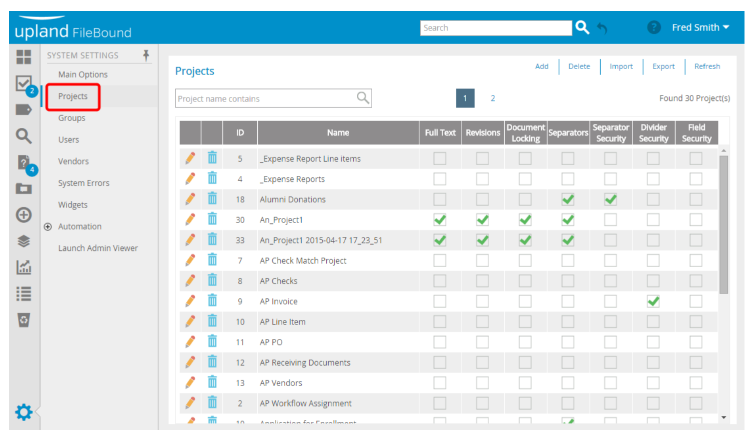
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



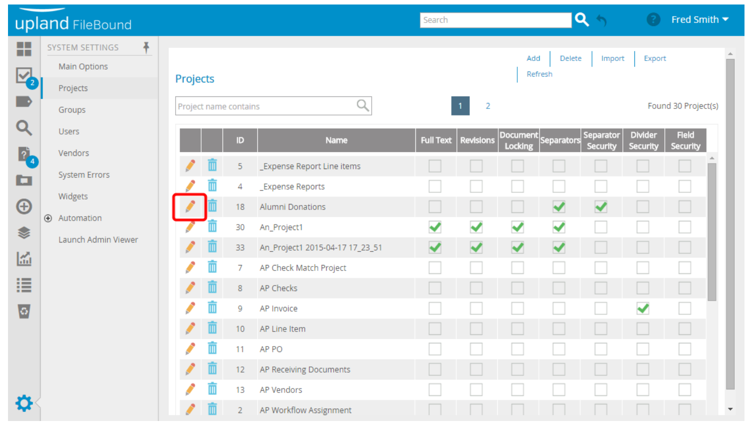
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



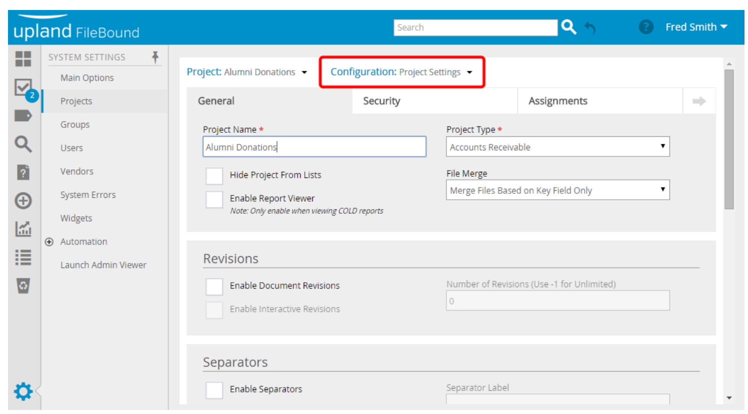
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



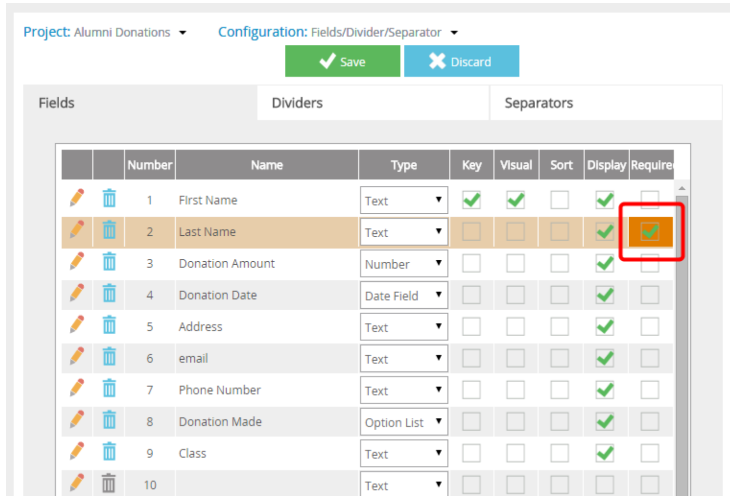
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Select the Required Check Box

1. Click the **Fields** tab.
2. Select the **Required** check box to make it mandatory for users to specify a value for the index field during file entry.
   Note: You can set the options from the **Setting** tab also, which is located in the index field properties dialog box.
3. Click **Save** on the toolbar.

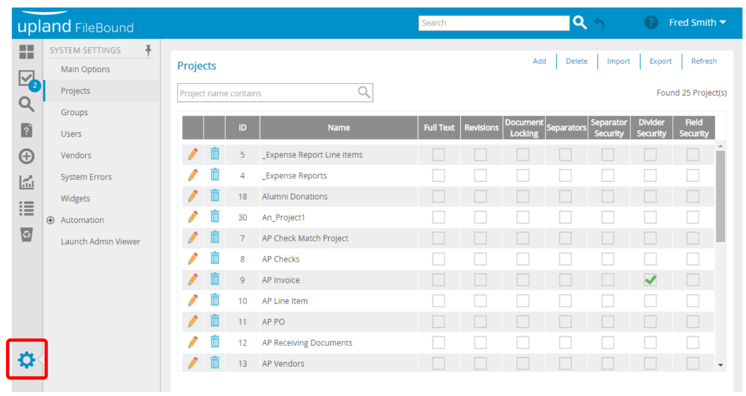


How do I edit an index field?

This lesson shows you how to edit an index field.

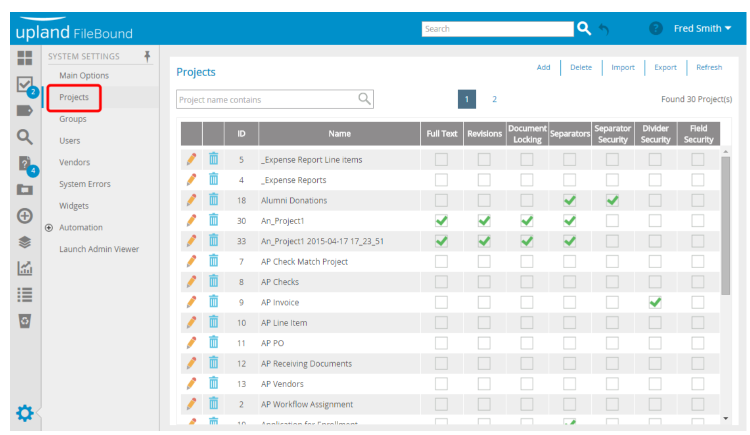
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



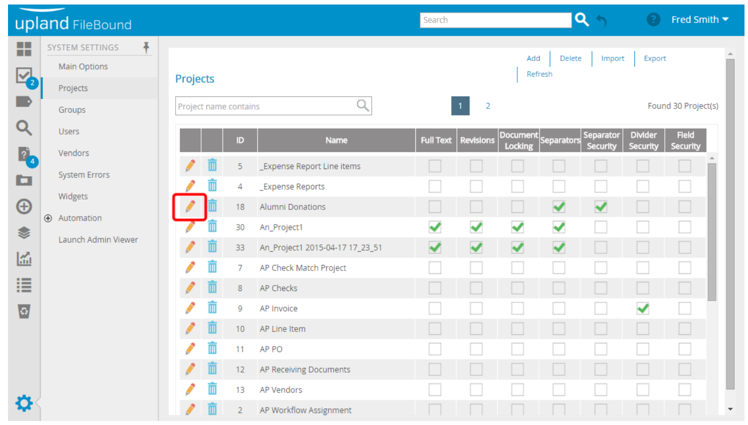
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



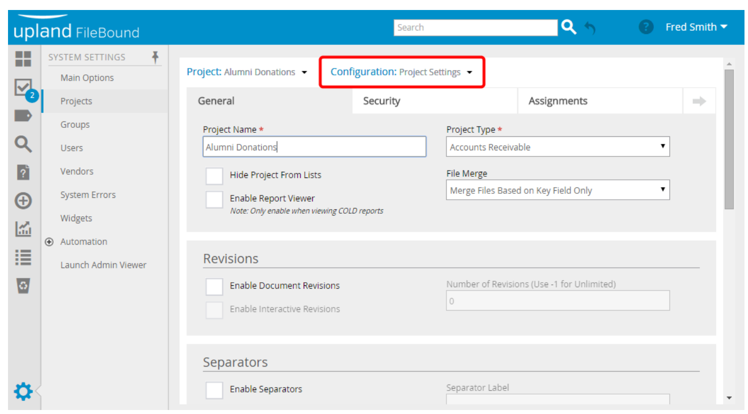
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



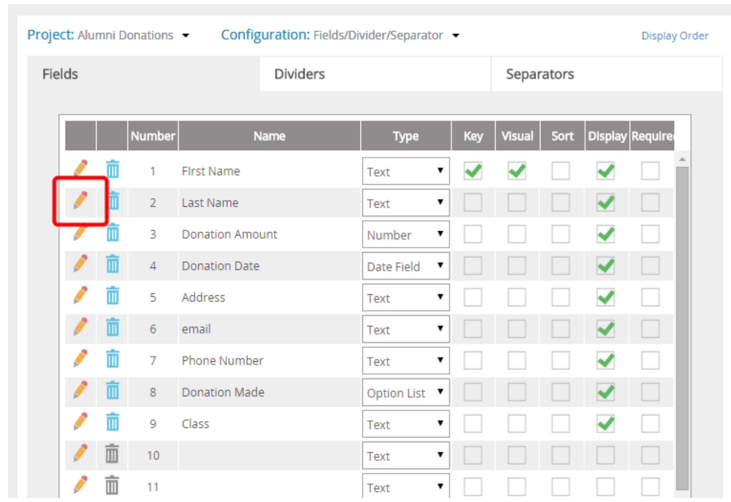
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



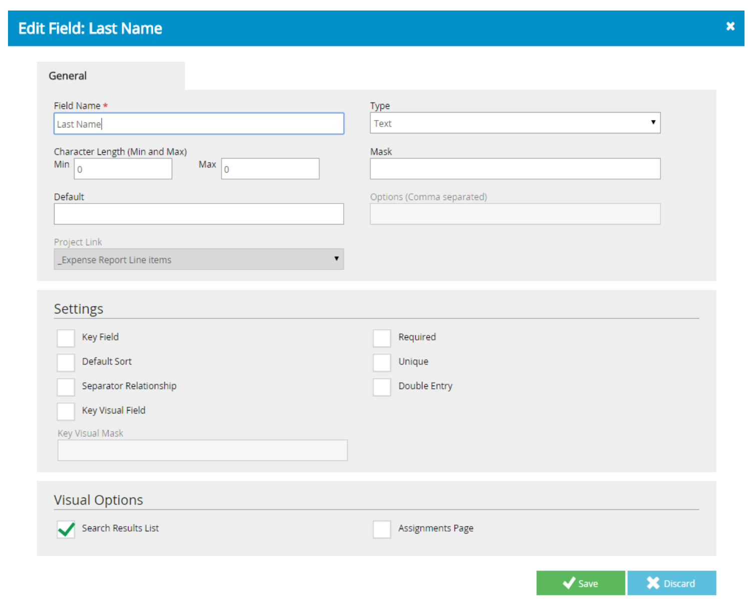
5. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the field you want to edit.
  The **Edit Field** dialog box opens.



6. Edit the Index Field Information

1. You can edit the index field.
2. Click **Save** to save the changes.

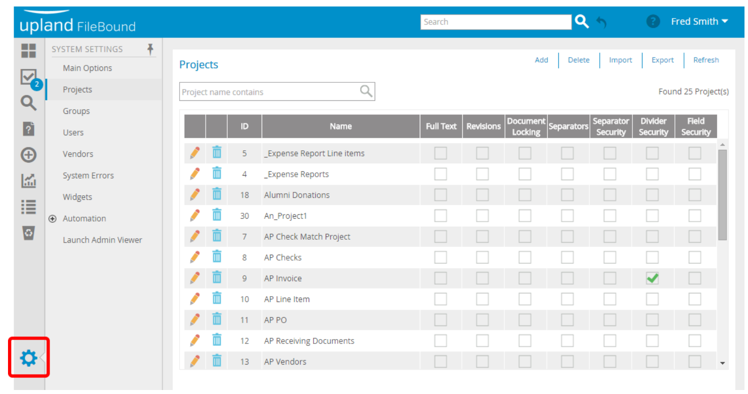


How do I delete an index field?

This lesson shows you how to delete an index field.

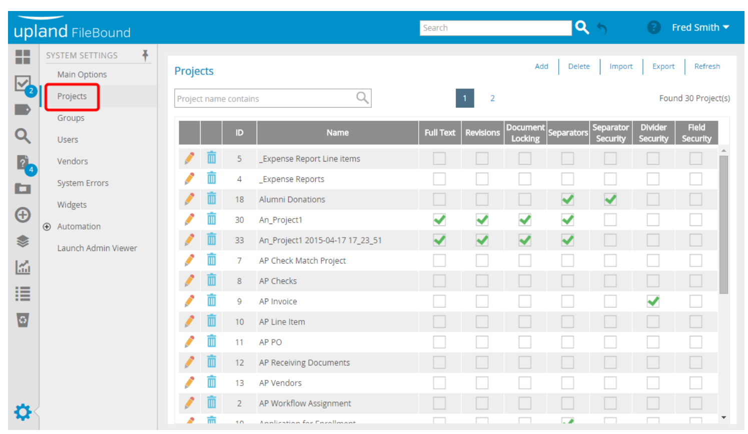
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



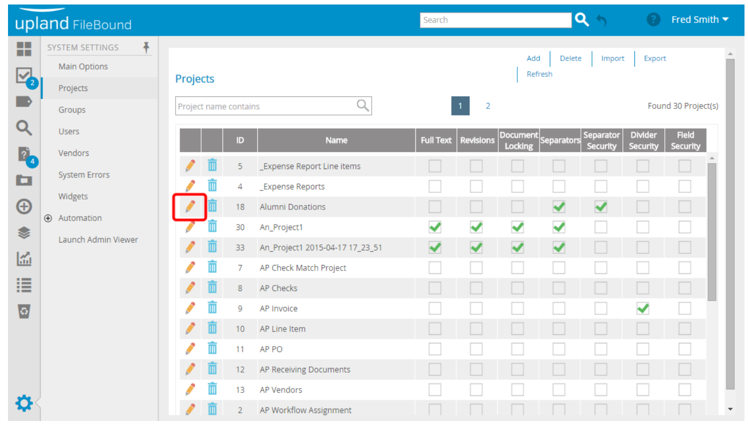
2. Click Projects

- Click **Projects**. The **Projects** page appears.



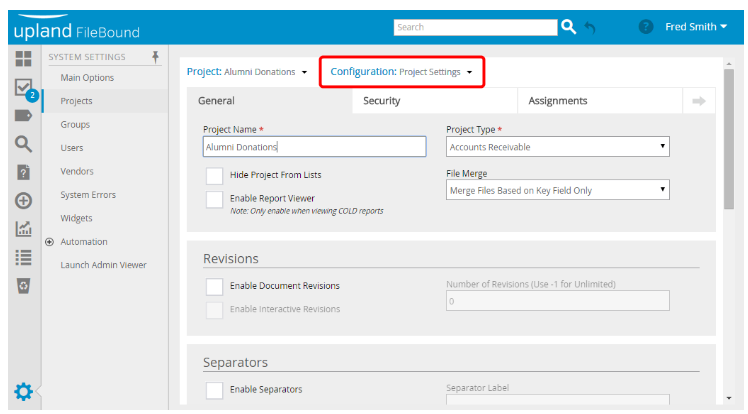
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



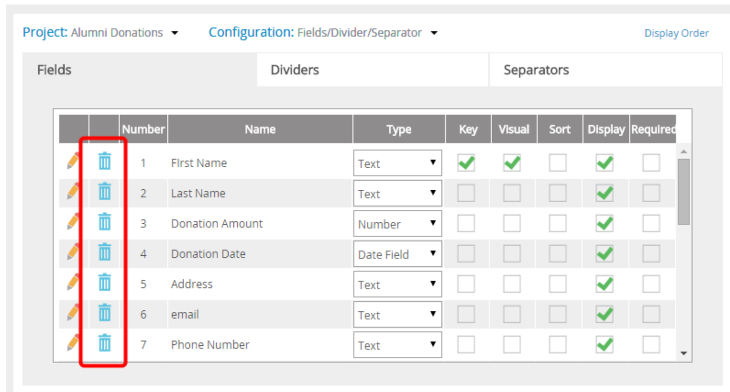
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Delete an Index Field

1. Click the **Fields** tab.
2. Click the delete icon adjacent to the field you want to delete.
   The index field is deleted after confirmation.

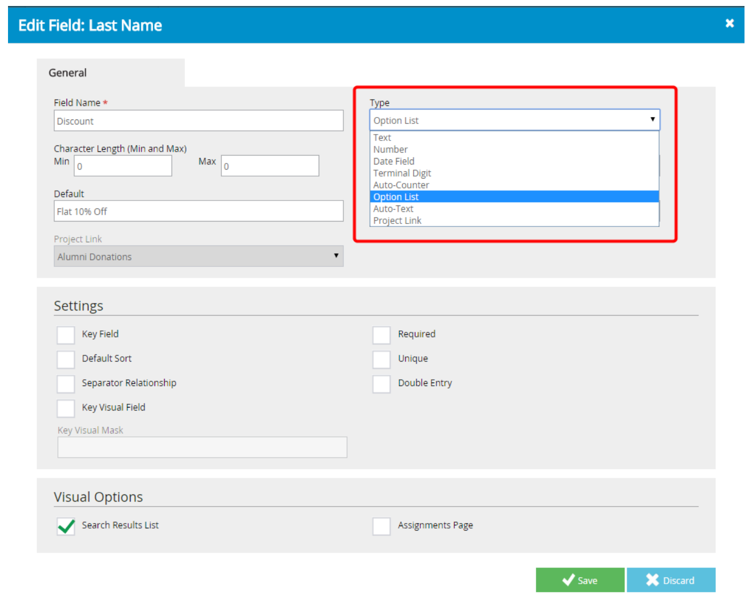


What are the different index field types?

This lesson provides information about the index field types available in WebDocs.

Index Field Types:

The following index field types are available:



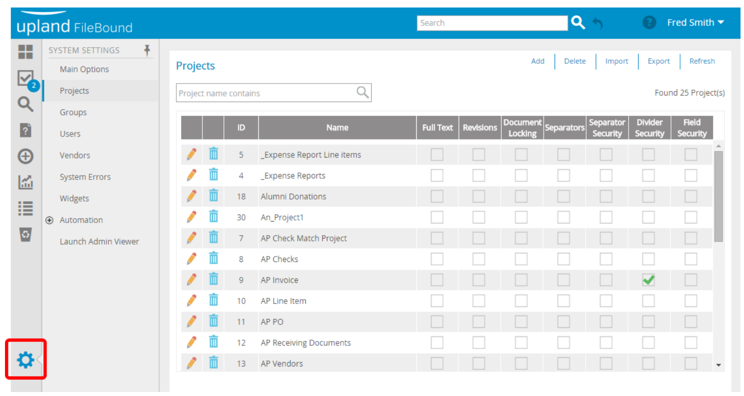
- **Text**: Contains alphanumeric characters that are not used for calculations.
- **Number**: Contains numeric values, plus symbol characters, and minus symbol character only. The number type can be used for calculations.
- **Date Field**: Contains a date. Displays a calendar control for selecting the date in the index field.
- **Terminal Digit**: Contains a number grouping mechanism for storing medical records. The last 2, 3, or 4 digits of the number are considered as a single unit. For example, the number 123 can represent the last 3 digits of a longer number. The number 123 is then considered as the ending or terminal digits, and the files can be grouped according to the index field of terminal digit type.
- **Auto-Counter**: Contains a number that gets incremented by 1 with every new file entry.
- **Option List**: Contains a list of values for the index field. A list is displayed for the index field, from which a value can be selected. The optional values can be specified in the **Options** box separated by commas.
- **Auto-Text**: Contains alphanumeric characters that begin with alphabets and end with numeric characters. The numeric characters part gets incremented by 1 with every new file entry.
- **Project Link**: Contains a list of key values from a linked project. You can link a project to the index field by specifying it on the **Project Link** list.

How do I mask characters into an index field when it is displayed?

This lesson shows you how to mask characters into an index field when it is displayed.

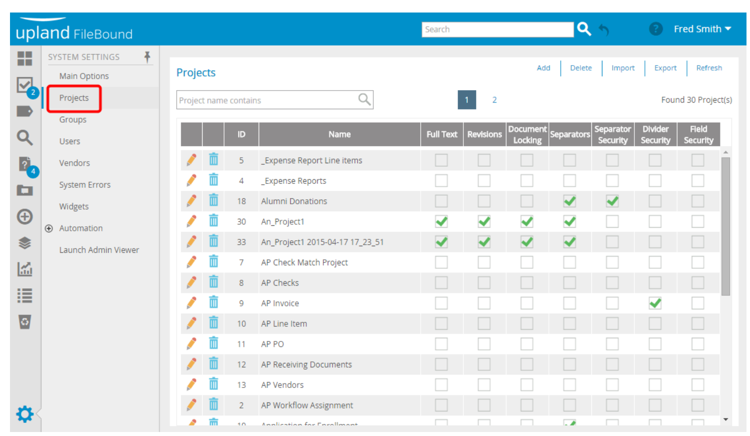
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



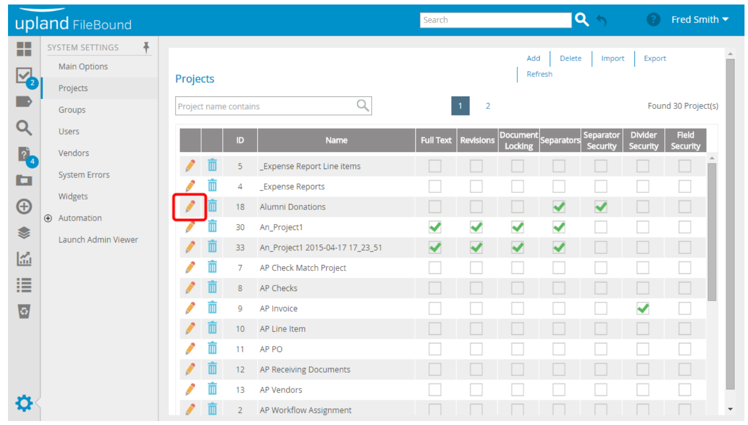
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



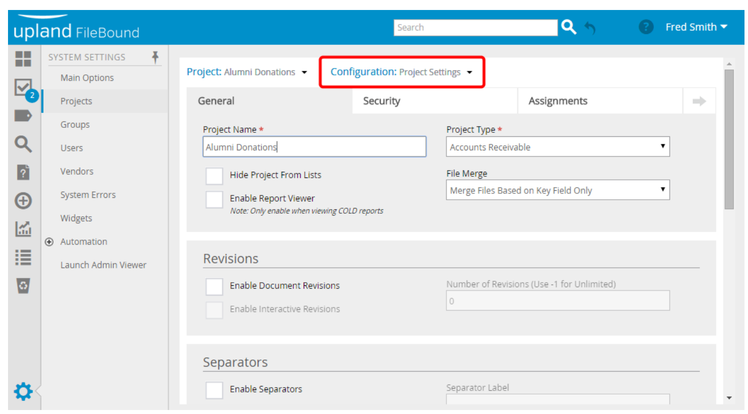
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



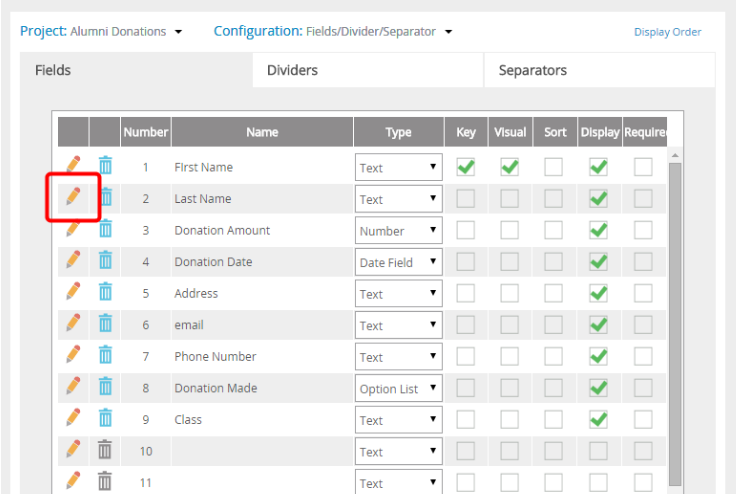
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



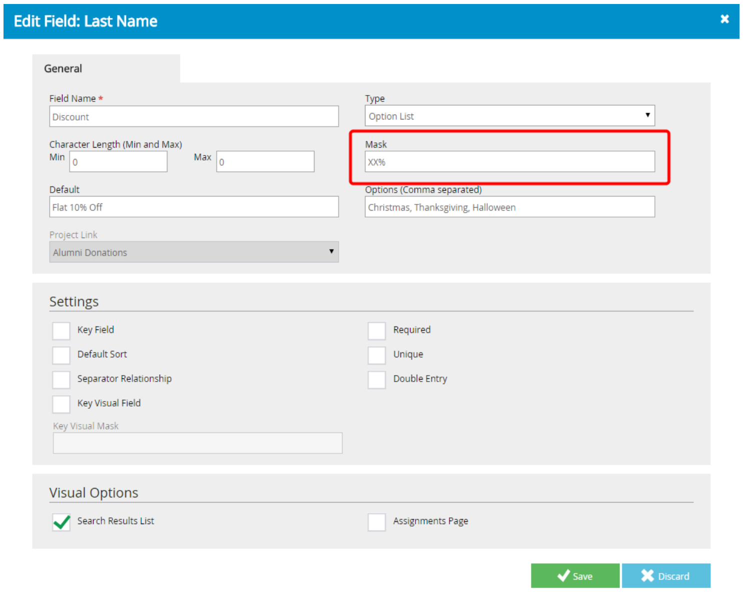
5. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the field you want to edit.
  The **Edit Field** dialog box opens.



6. Specify a Mask

1. You can specify how to display an index field in the **Mask** box.
   - Use 'X' to specify alphanumeric values in the mask.
   - Use '#' to specify numeric values in the mask.
   - Use '?' to specify values of any type in the mask.
   - Use '$' to apply the dollar sign only to a numeric field. **Note:** Does Not Display decimal or anything after the decimal.
   - Use '$.' to apply the dollar sign, appropriate commas, and the decimal points to a numeric field.
     Note: The **Mask** box displays a list of date formats for a date type index field.



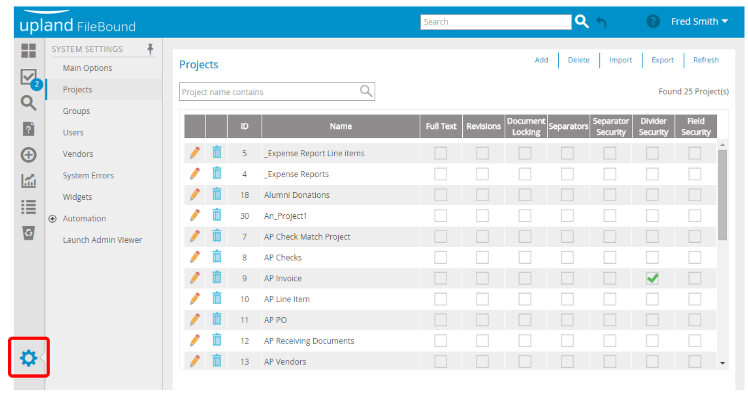
2. Click **Save**.

How do I set the default value for an index field?This

lesson shows you how to set the default value for an index field.

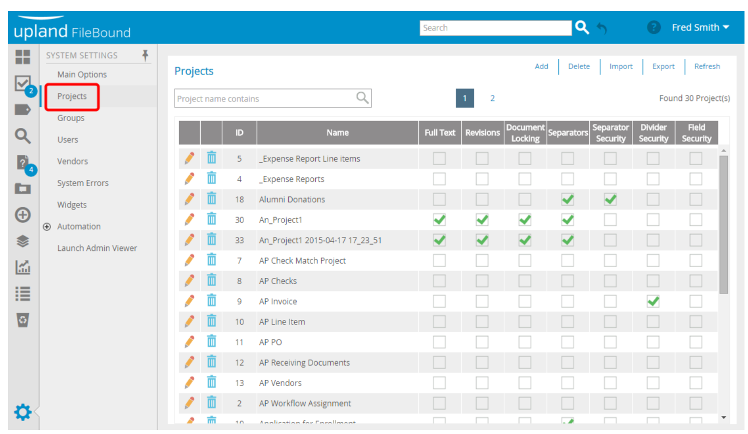
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



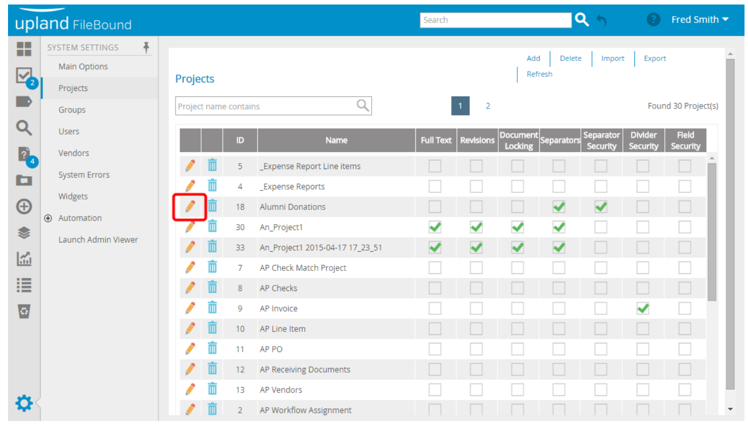
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



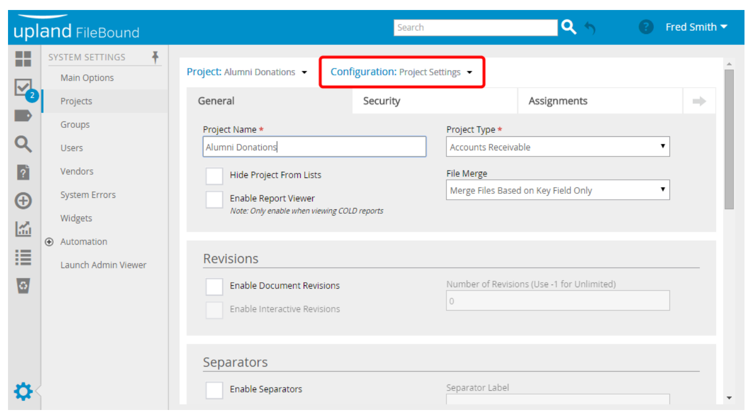
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



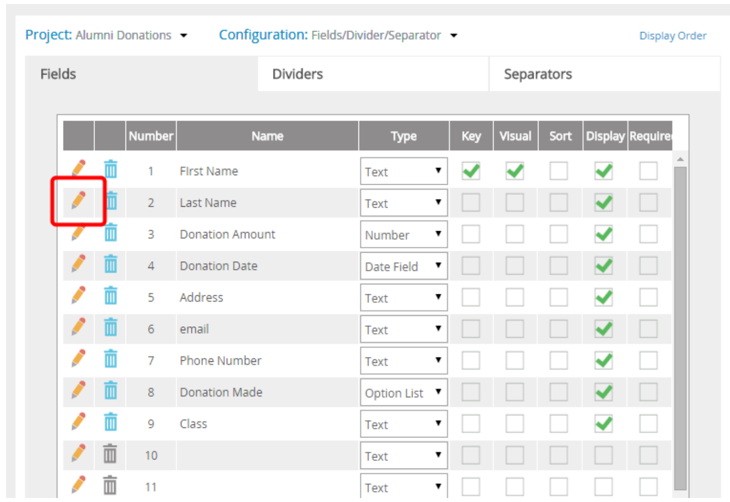
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



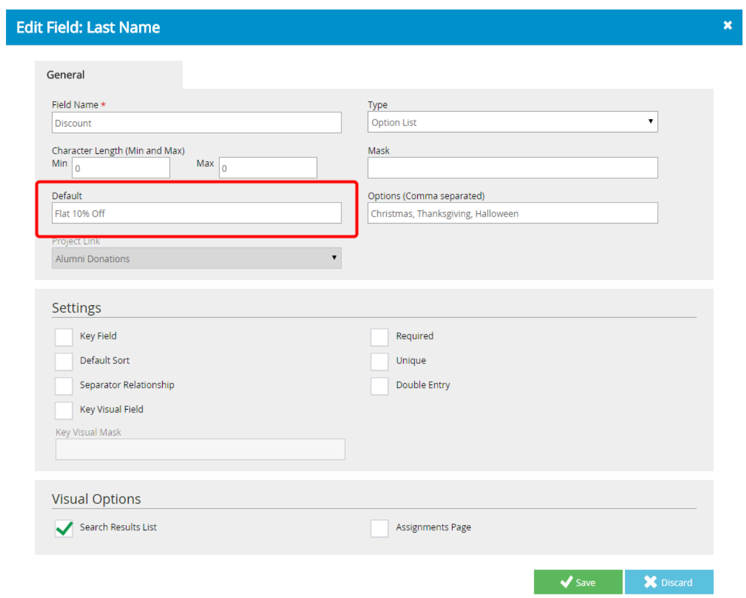
5. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the field you want to edit.
  The **Edit Field** dialog box opens.



6. Specify a Default Value

1. You can specify a default value for the index field in the **Default** box.
   For example, specify **$$DATE$$** in the **Default** box to assign the current date as a default value to the date type index field.
2. Click **Save**.



Following are the list of variable types available for the index field values:

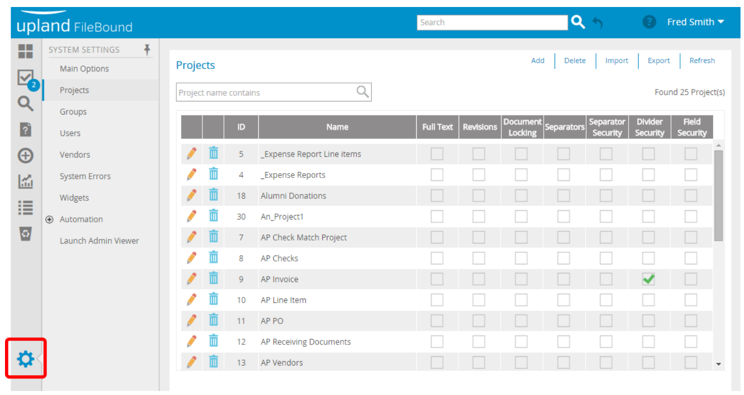
- **$$DATE$$**: Enters the current date into the index field.
- **$$TIME$$**: Enters the current time into the index field.
- **$$DATETIME$$**: Enters the current date and time into the index field.
- **$$USER$$**: Enters the user name of the currently logged on user into the index field.
- **$$USERID$$**: Enters the user ID number of the currently logged on user into the index field.
- **$$CONTACT$$**: Enters the full name of the currently logged on user into the index field.

How do I set the options for an Option List field type?

When you select **Option List** from the **Type** list, you need to specify the options that will be displayed. This lesson shows you how to set the options for an **Options List** field type.

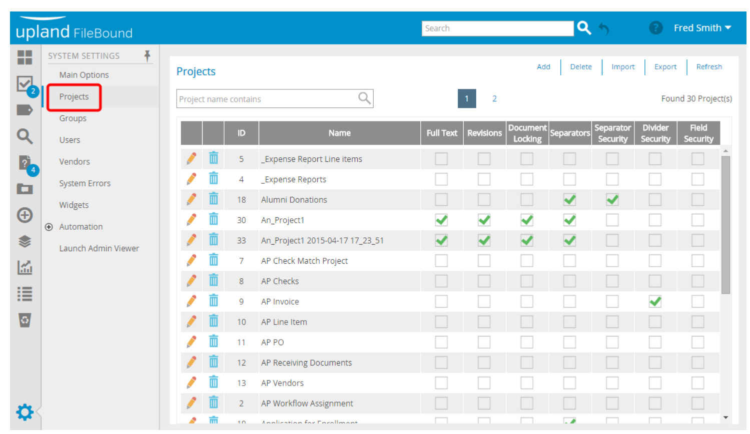
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



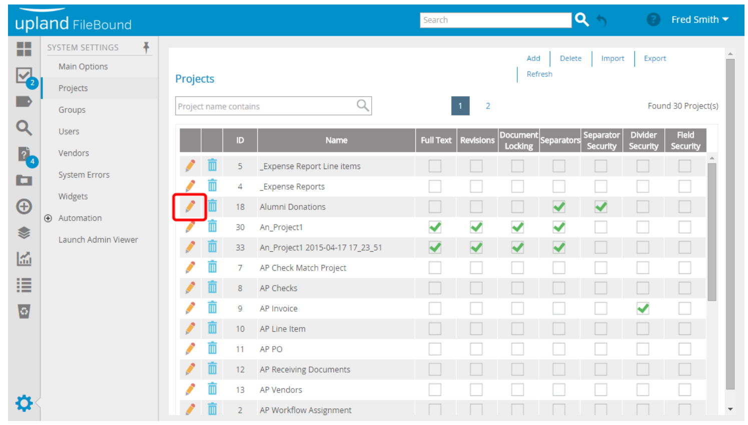
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



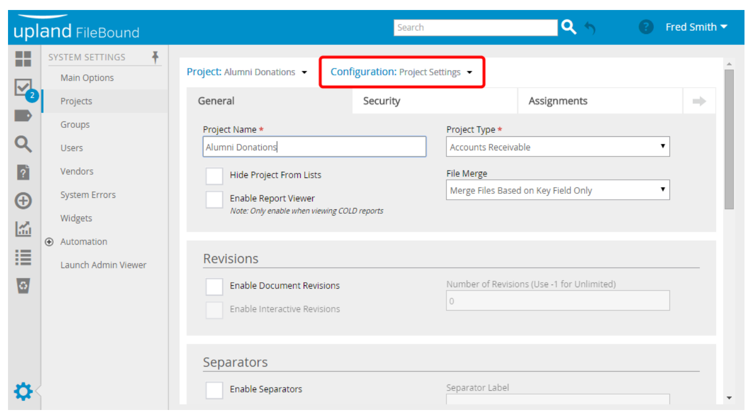
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



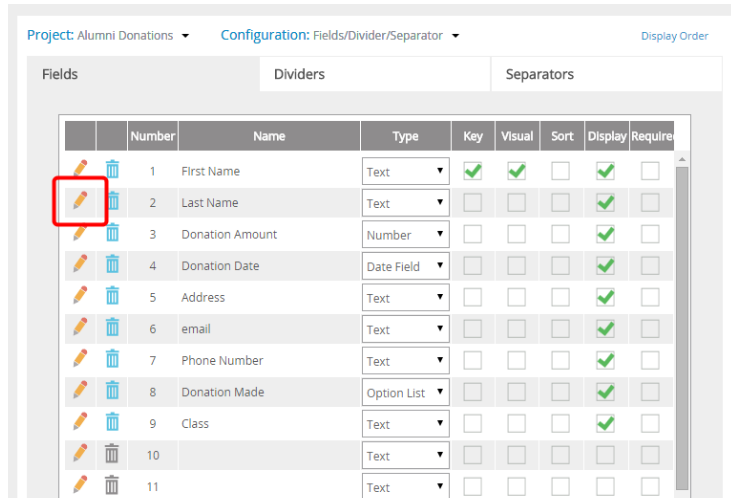
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



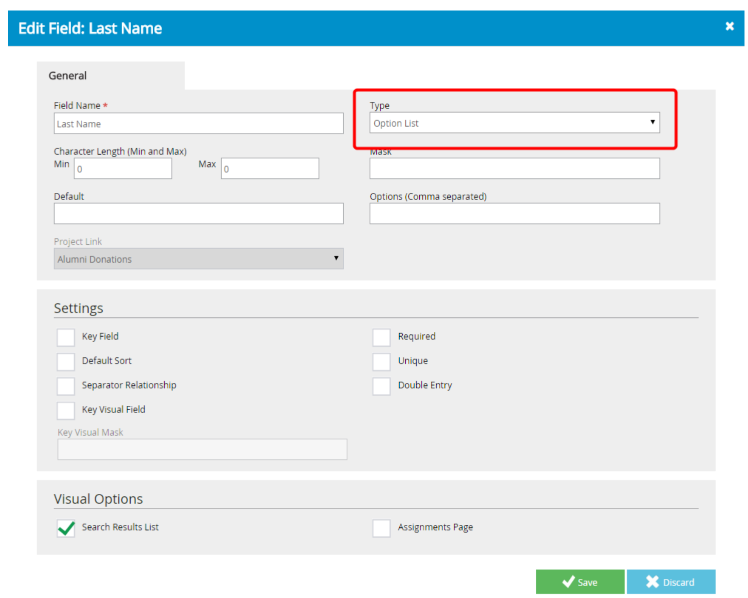
5. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the field you want to edit.
  The **Edit Field** dialog box opens.



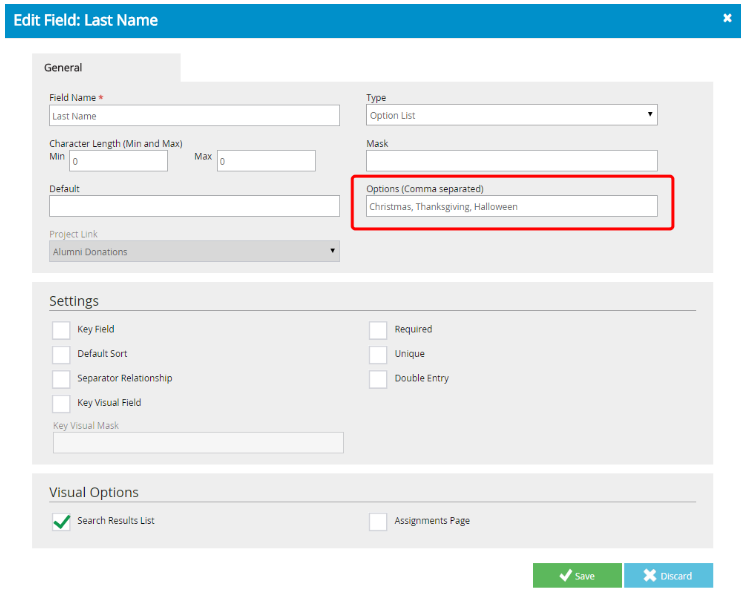
6. Select the Option List Option

- Select the **Option List** option from the **Type** list.
  The **Options** box is enabled.



7. Specify a Options

1. You can specify the optional values for a list type index field in the **Options** box, separated by commas.
2. Click **Save**.

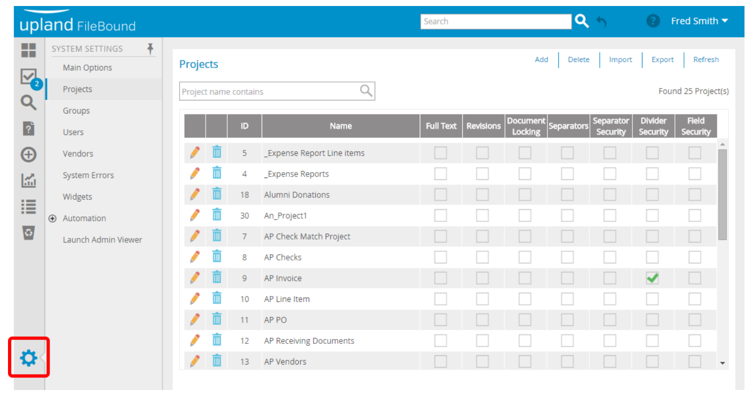


How do I configure a Project Link field type?

You can link a project to the index field to display the key fields of the linked project in the index field. This lesson shows you how to configure a **Project Link** field type.

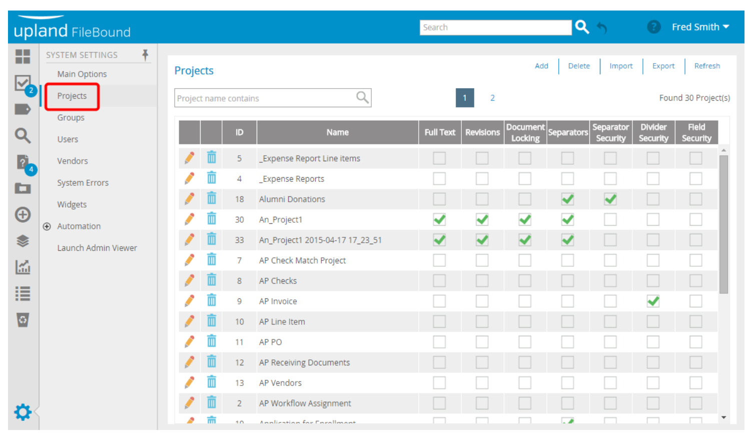
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



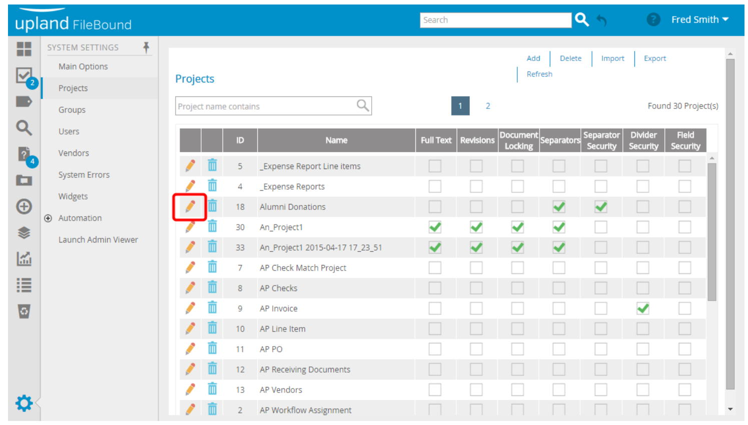
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



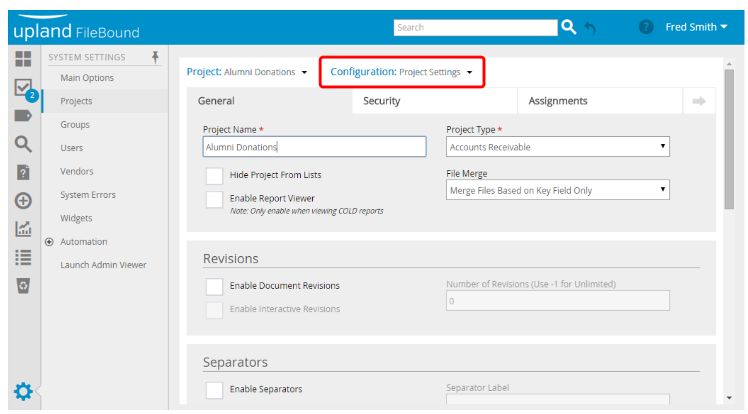
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



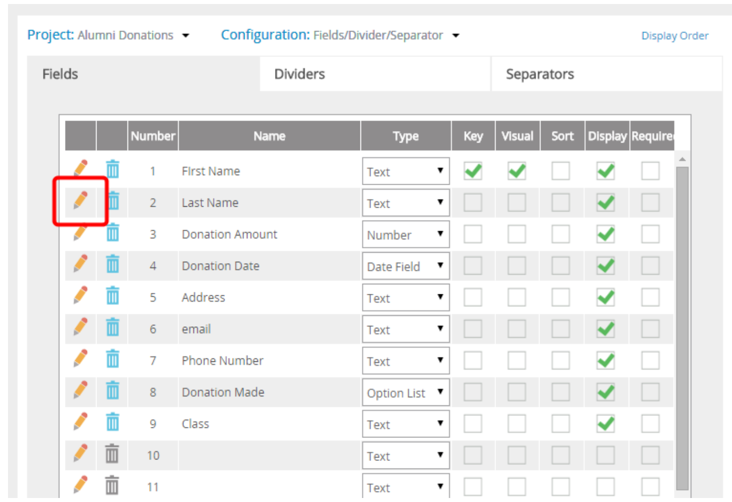
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



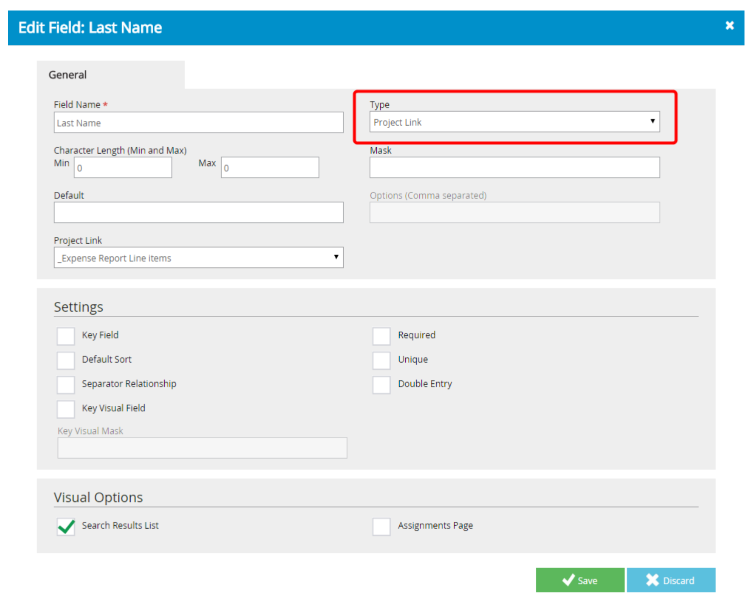
5. Open the Edit Field Dialog Box

- Click the edit icon adjacent to the field you want to edit.
  The **Edit Field** dialog box opens.



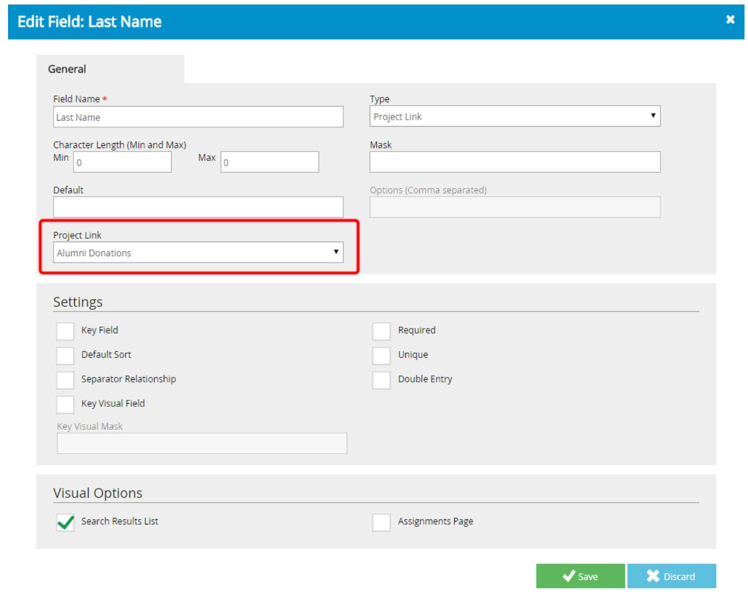
6. Select the Project Link Option

- Select the **Project Link** option from the **Type** list.
  The **Project Link** list is enabled.



7. Select a Project

1. Select a project from the **Project Link** list to display the key fields of the selected project in a list for the index field.
2. Click **Save**.



What is a separator?

This lesson provides information about separators in WebDocs.

Separators are useful to organize dividers. They provide a level of organization between the file and dividers.

You can set properties for separators using the following methods:

- Setting project properties of a separator, which are applicable to all the separators of that project.
- Setting properties of an individual separator.

What is a divider?

This lesson provides information about dividers in WebDocs.

Dividers help to logically group documents in a file. You can create dividers for a project to index documents of all the files of the project. Dividers can also be used to implement security and restrict access to the documents within a divider. You can set properties for dividers using the following methods:

- Setting project properties of a divider, which are applicable to all the dividers of that project.
- Setting properties of an individual divider.

You must configure the dividers, after you have added the dividers to a project.

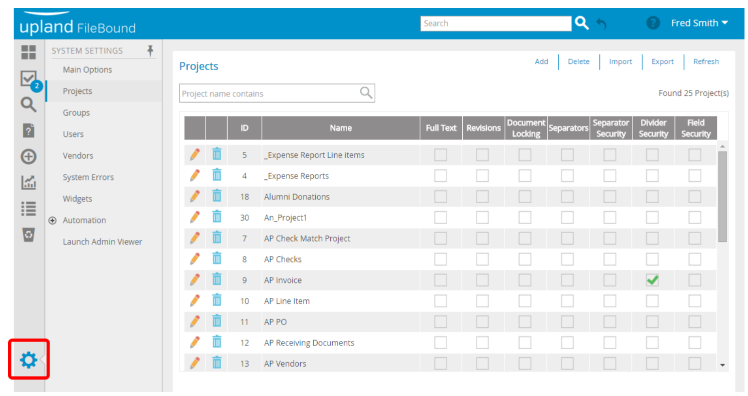
How do I add a separator?

You can add separators to a project one at a time, or you can add multiple separators to a project at a time. In both the cases, you must configure the separator or separators, after you have added the separators to a project. This lesson shows you how to add a separator.

Note: Separators need to be enabled for a project you want to add separators to.

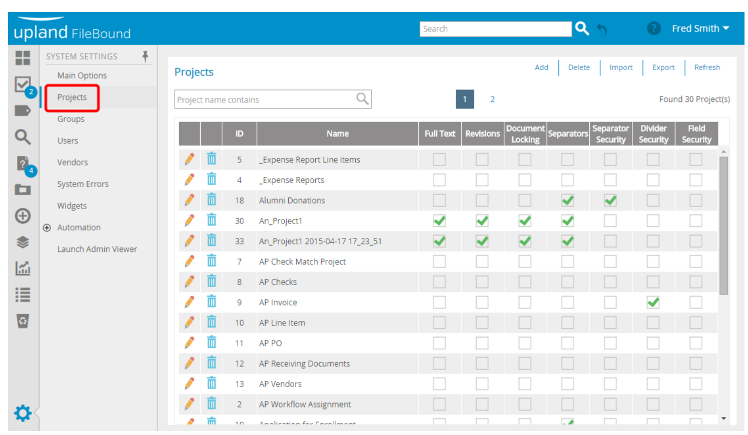
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



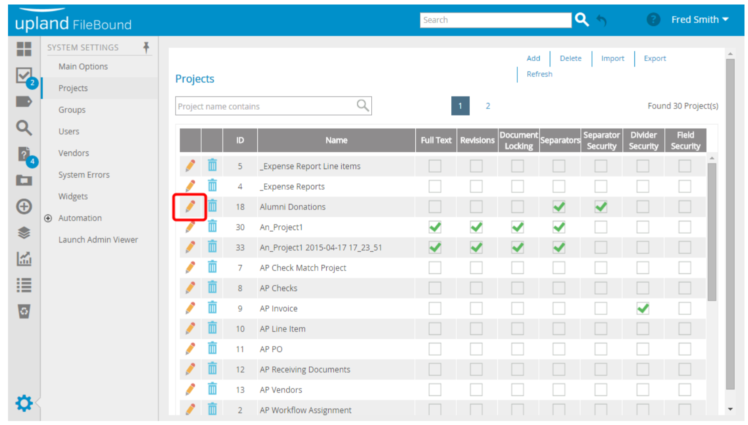
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



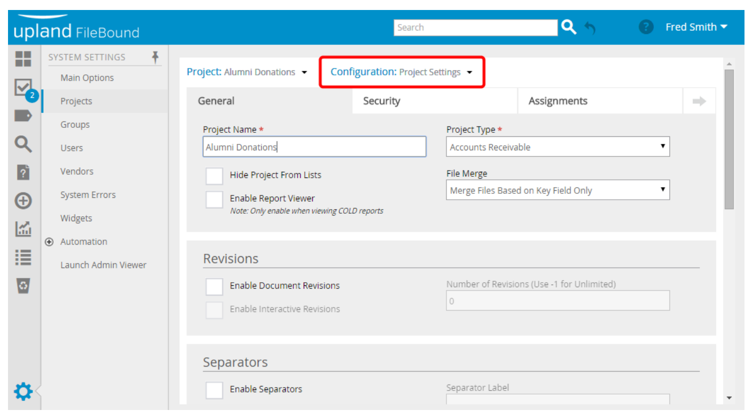
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



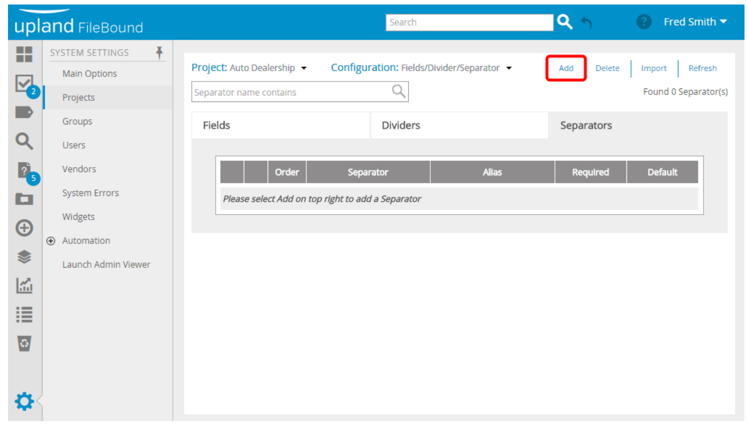
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



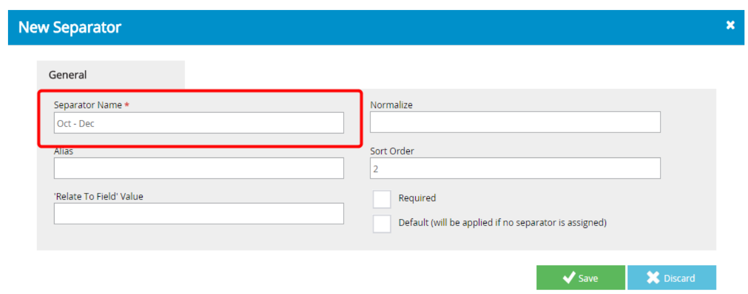
5. Open New Separator Dialog Box

1. Click the **Separators** tab.
2. Click **Add** on the toolbar.
   The **New Separator** dialog box opens.



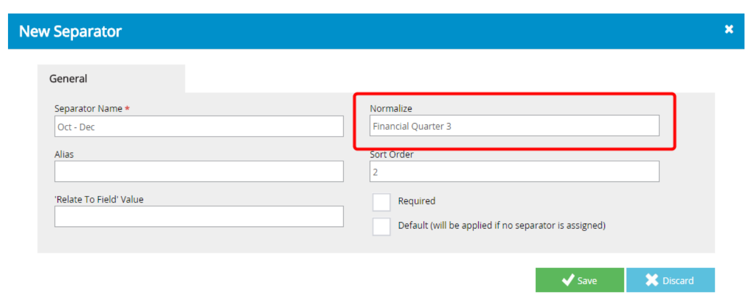
6. Specify the Separator Name

- You can specify the name of the separator in the **Separator Name** box.



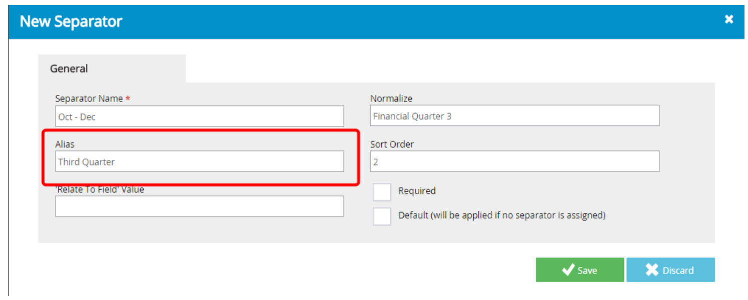
7. Specify Alternate Name

- You can specify an alternative separator name as per the requirement in the **Normalize** box.
  You can change the name of the separator when you export or email documents from the **Viewer**.
  For example, documents placed under the 'Oct-Dec' separator, are exported with the name 'Financial Quarter 3'.



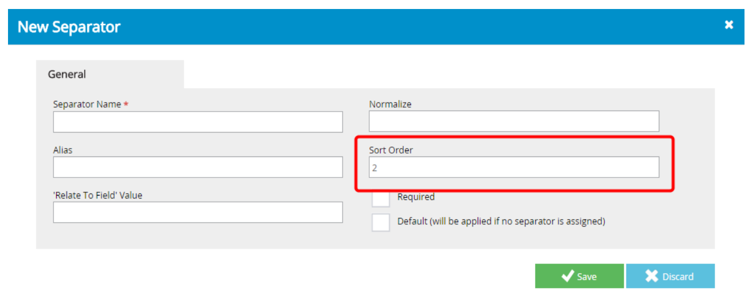
8. Specify an Alias Name

- You can specify an easy alias name for the separator by typing in the **Alias** box.
  You can substitute the original separator name by an alias name while generating barcode index for the documents. This is helpful when the separator name is very long or contains a lot of punctuations.



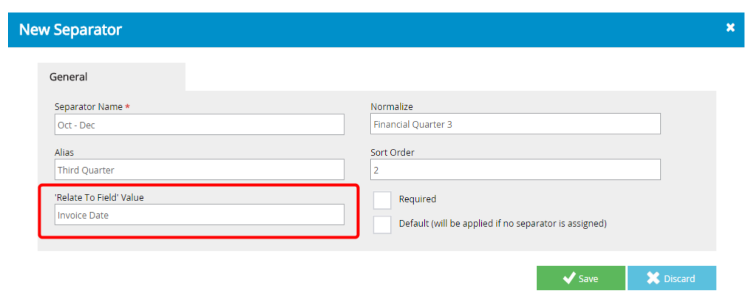
9. Specify Sort Order

- You can alter the order of the list of separators by typing the numerical order in the **Sort Order** box.
  By default, WebDocs organizes separators in alphabetical order.



10. Manage the Availability of Separator

- You can manage the availability of separators for the documents in a file, by providing value of the index field in the **'Relate To Field' Value** box. This is possible, when an index field of the project is related with the separators. Specific value for the related index field is assigned to the separator. While adding documents in the files, the separator becomes available only for the files, having index field value same as the value assigned to the separator. If you don't provide any value for the **'Relate To Field' Value** box, then the separator is available for all the files.

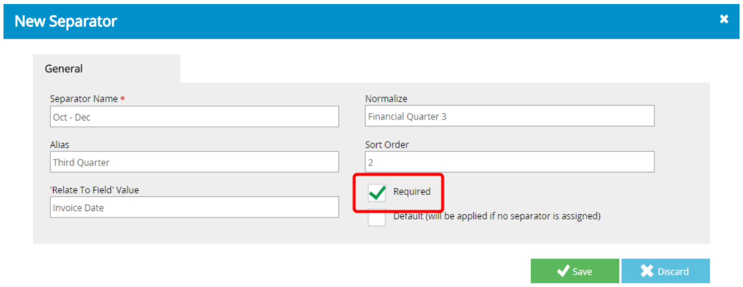


For example, in the **Clinic Records** project, the **Patient Summary** separator is available for arranging documents in the files, having the **DOB** index field value equal to 12/20/88. Here, the DOB index field is related with the separators.
Note: To relate a separator with an index field, you must select the **Separator Relationship** check box in the

Settings tab of the index field, along with providing value for the **'Relate To Field' Value** box. For any project you can relate a separator to only one index field.

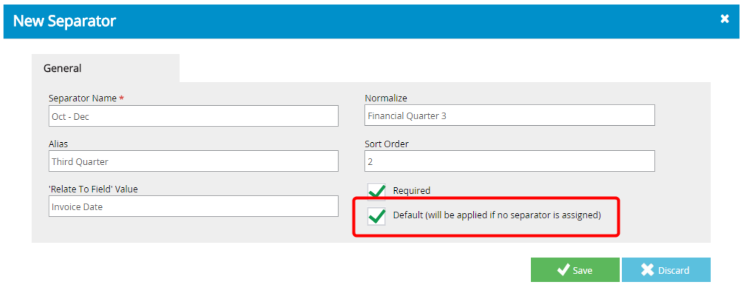
11. Select the Required Check Box

- You can select the **Required** check box, to make the separator mandatory.



12. Select the Default Check Box

1. You can select the **Default** check box, to make the separator the default separator.
2. Click **Save**.

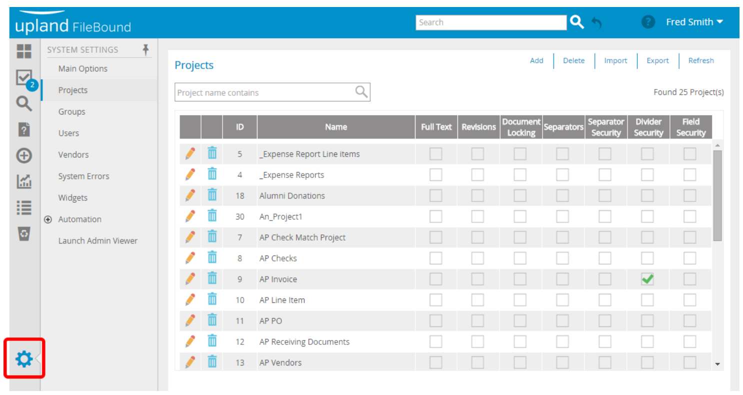


How do I add a divider?

You can add dividers to a project one at a time, or you can add multiple dividers to a project at a time. In both cases, you must configure the divider or dividers, after you have added the dividers to a project. This lesson shows you how to add a divider.

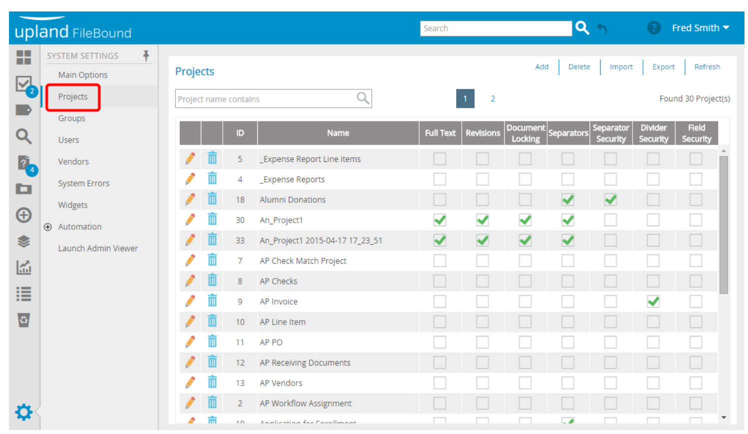
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



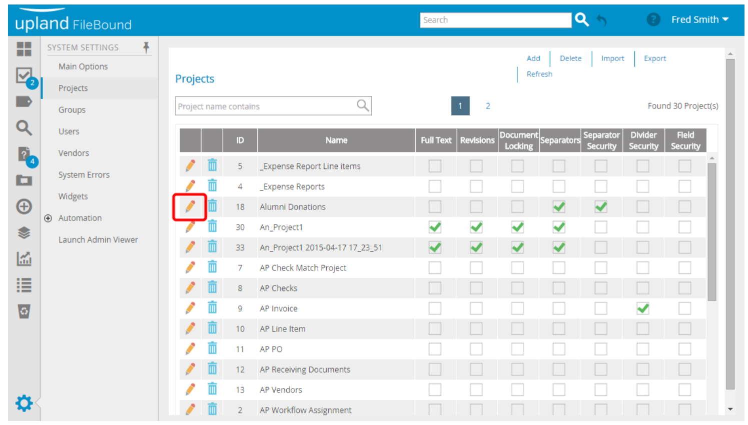
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



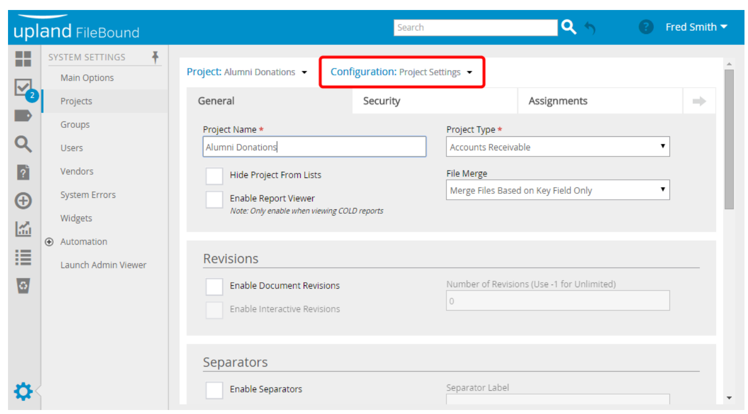
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



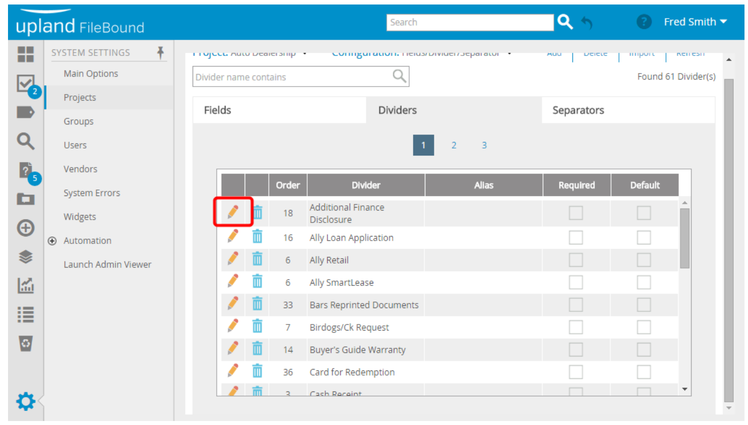
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



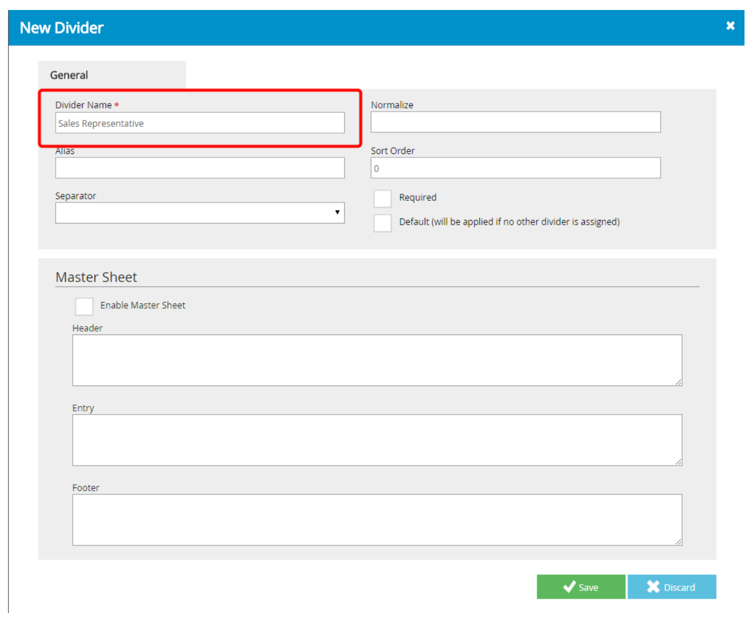
5. Open New Divider Dialog Box

1. Click the **Dividers** tab.
2. Click **Add** on the toolbar.
   The **New Divider** dialog box opens.



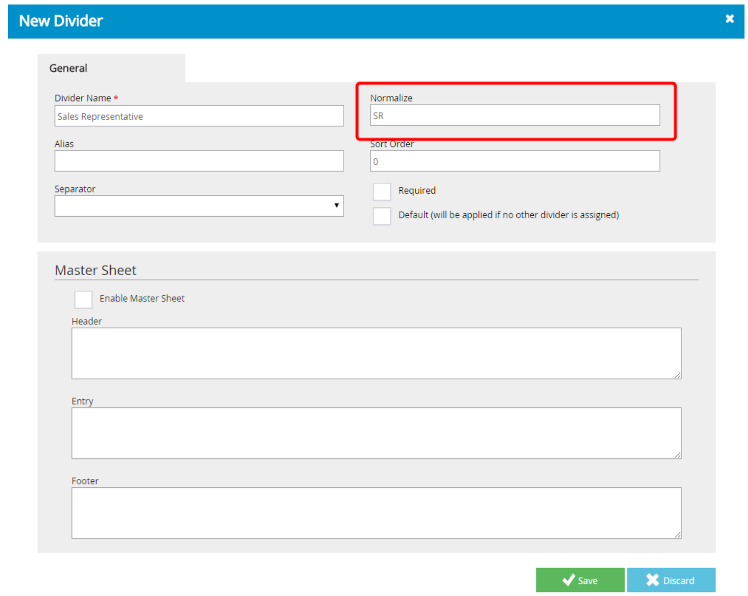
6. Specify the Divider Name

- You can specify the name of the divider in the **Divider Name** box.



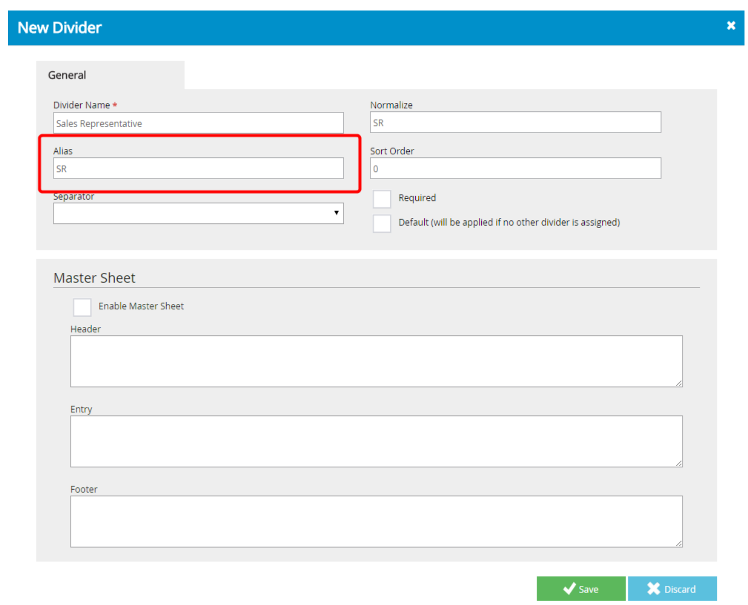
7. Specify Alternate Name

- You can specify an alternative divider name as per the requirement in the **Normalize** box.
  You can change the name of the divider when you export or email documents from the **Viewer**. For example, documents placed under the 'Sales Representatives' divider, are exported with the name 'SR'.



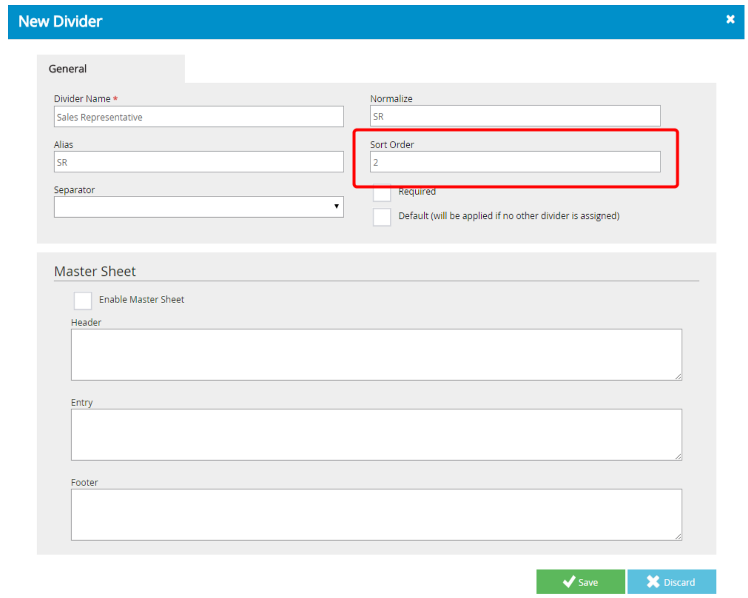
8. Specify an Alias Name

- You can specify an easy alias name for the divider by typing in the **Alias** box.
  You can substitute the original divider name by an alias name while generating barcode index for the documents. This is helpful when the divider name is very long or contains a lot of punctuations.



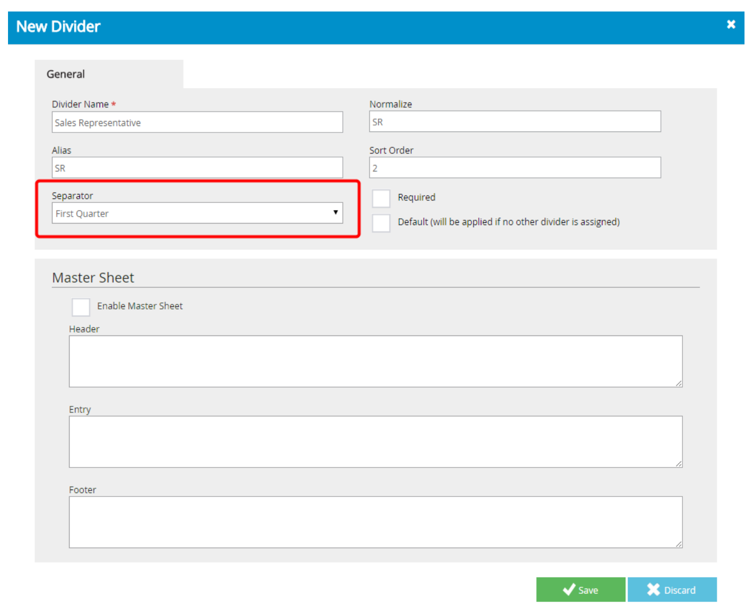
9. Specify the Order

- You can alter the order of the list of dividers by typing the numerical order in the **Sort Order** box.
  By default, WebDocs organizes dividers in alphabetical order.



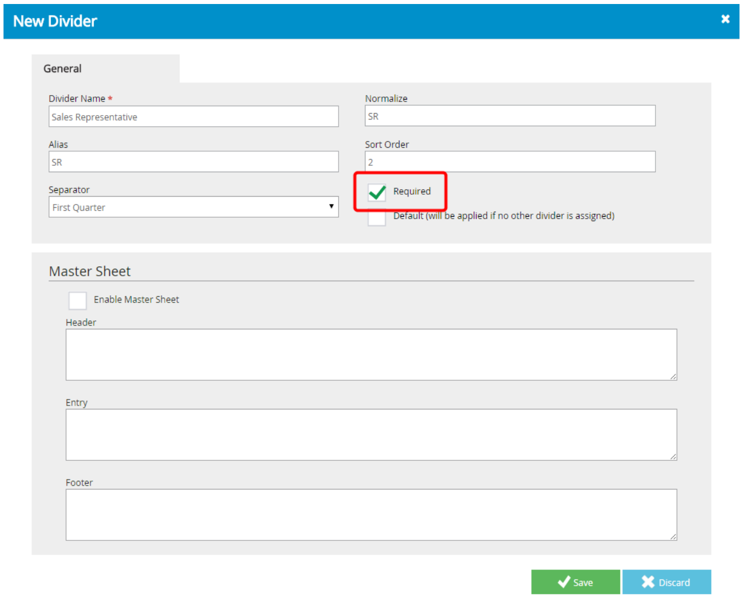
10. Select a Separator

- Select a separator name from the **Separator** list to associate a separator with the divider.
  Note: The **Viewer** displays the dividers, associated with the separator while adding a new document.



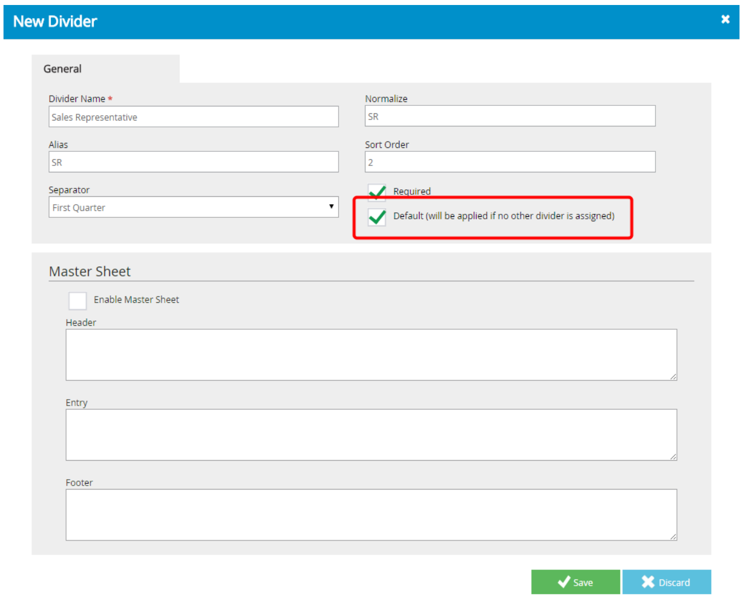
11. Select the Required Check Box

- You can select the **Required** check box, to make the divider mandatory.



12. Select the Default Check Box

1. You can select the **Default** check box, to make the divider the default divider.
2. Click **Save**.

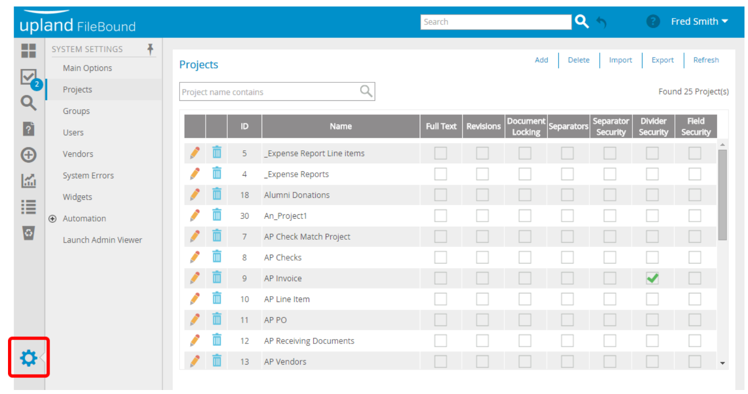


How do I delete a separator?

This lesson shows you how to delete a separator.

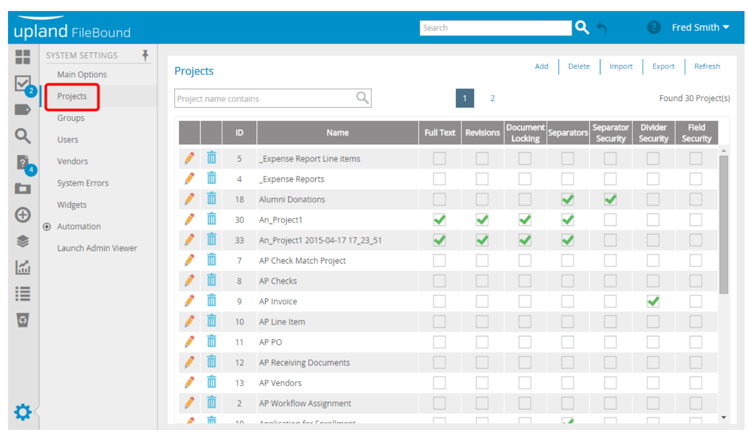
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



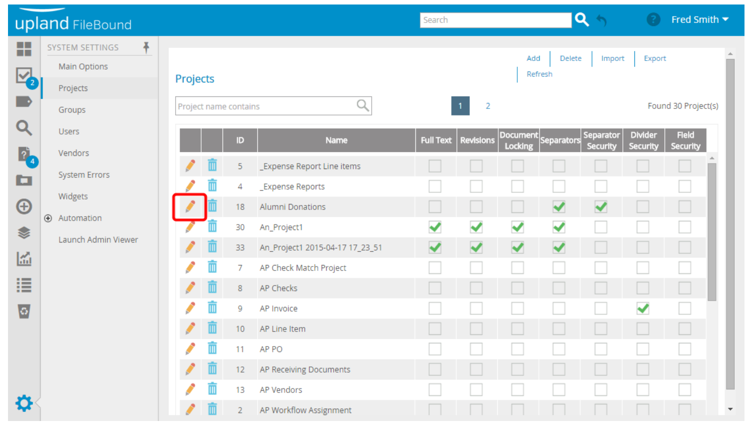
2. Click Projects

- Click **Projects**. The **Projects** page appears.



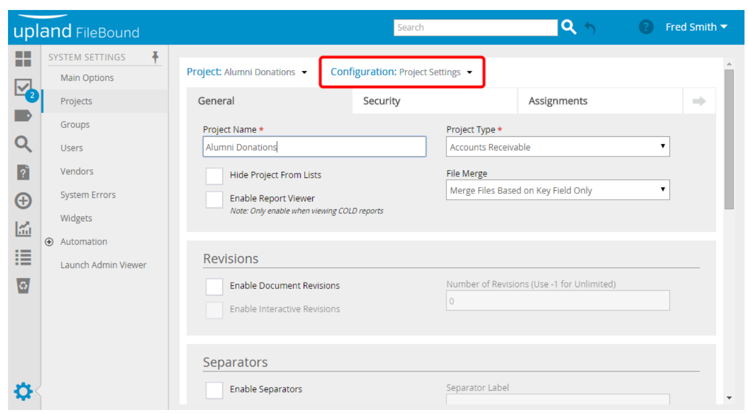
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



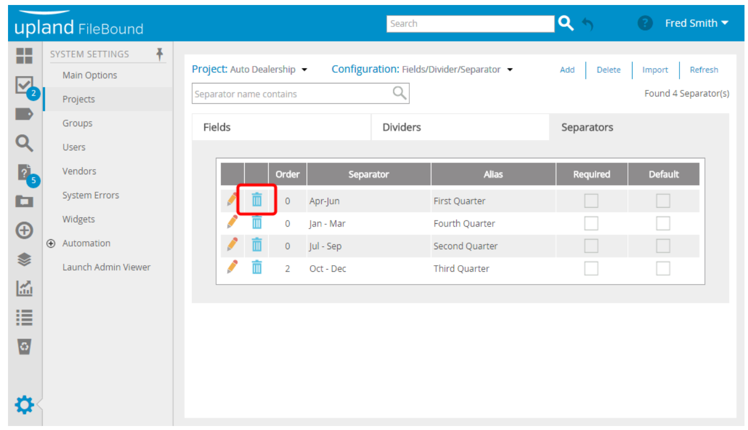
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Delete a Separator

1. Click the **Separators** tab.
2. Click the delete button adjacent to the separator you want to delete.
   The separator is deleted after confirmation.



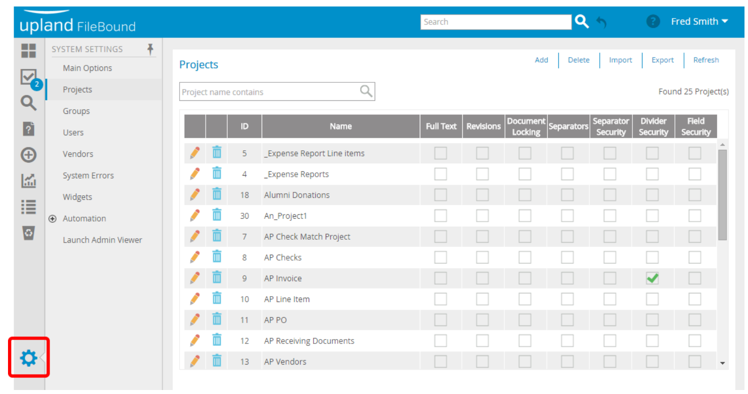
Note: Once the separator is delete, it is no longer available in the search, file entry, and so on. The deleted separator will still be available in a viewer. This behavior is to prevent the loss of document when a separator is deleted. The deleted separator is displayed in a viewer until it is changed or deleted from a viewer.

How do I delete a divider?

This lesson shows you how to delete a divider.

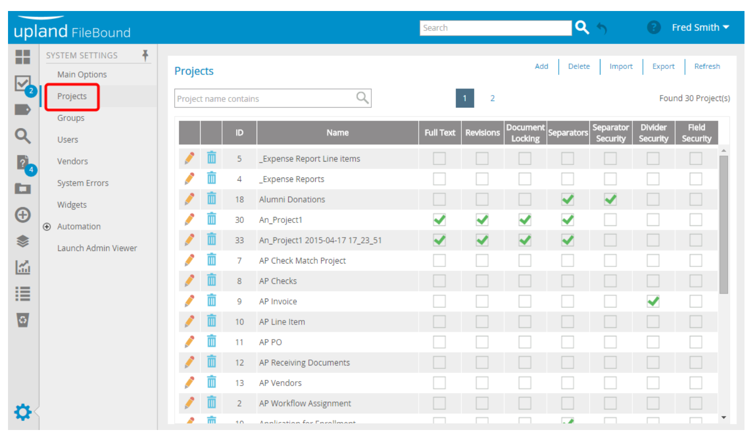
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



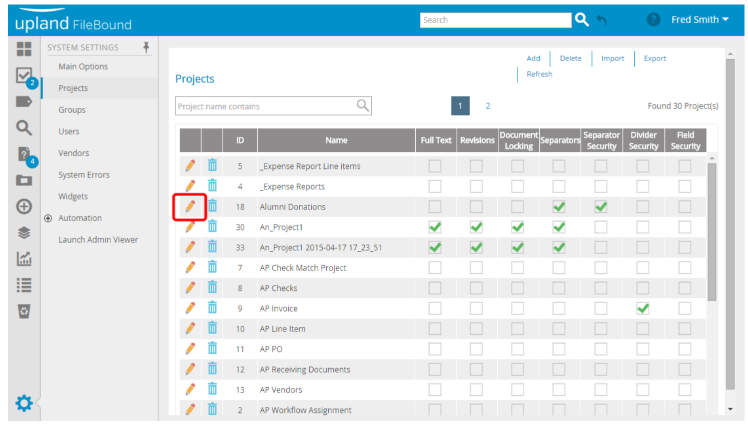
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



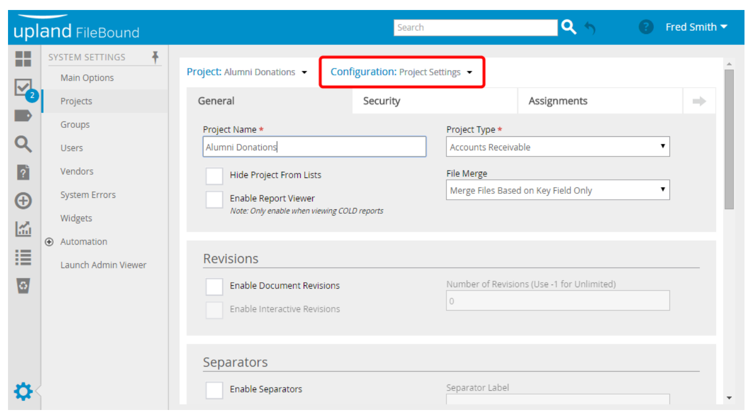
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



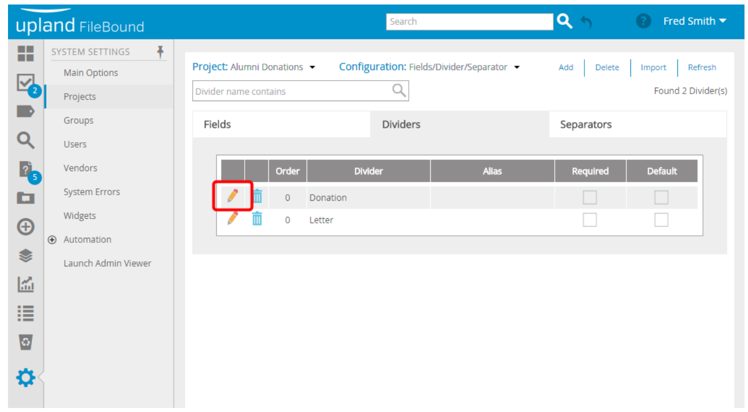
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



5. Delete a Divider

1. Click the **Dividers** tab.
2. Click the delete button adjacent to the divider you want to delete.
   The divider is deleted after confirmation.
   Note: Once the divider is delete, it is no longer available in the search, file entry, and so on. The deleted divider will be still available in a viewer. This behavior is to prevent the loss of document when a divider is deleted. The deleted divider is displayed in a viewer until it is changed or deleted from a viewer.

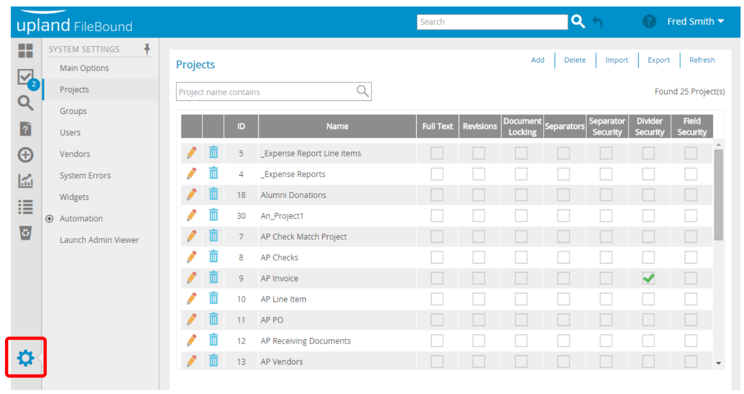


How do I edit the properties of a separator?

This lesson shows you how to edit the properties of a separator.

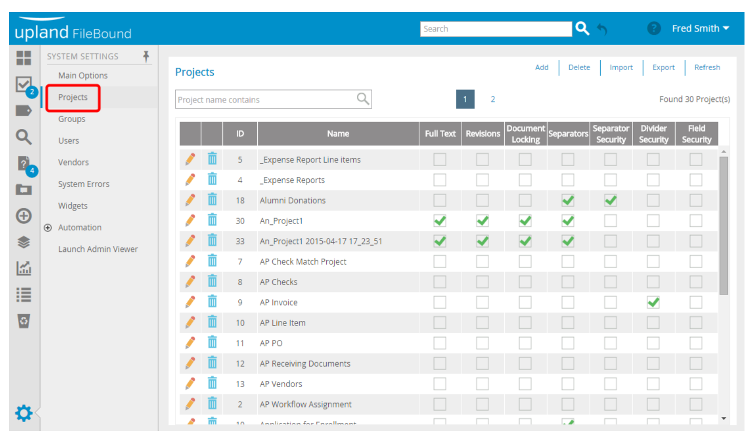
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



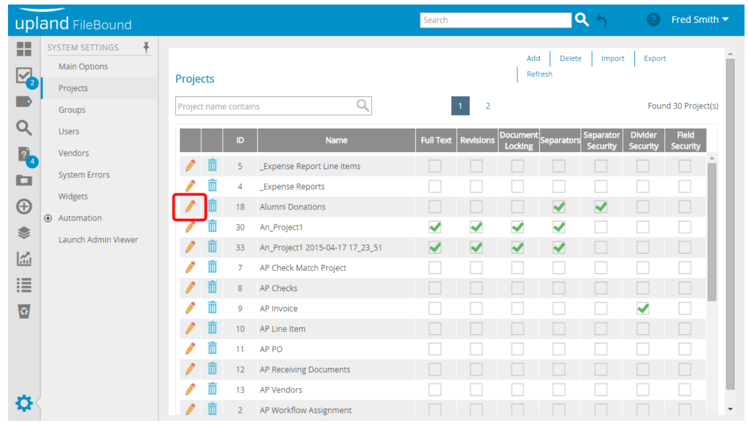
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



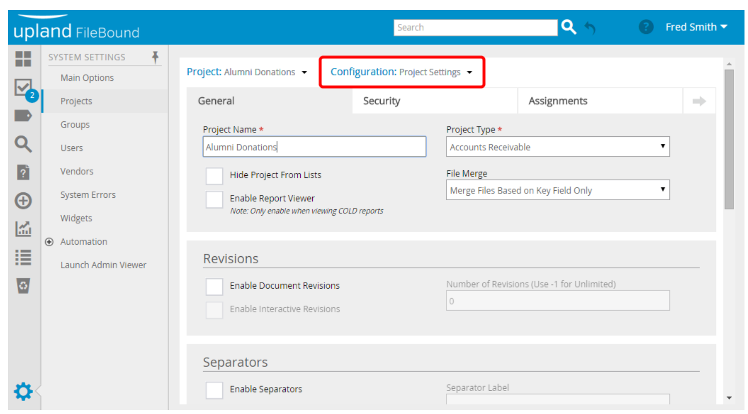
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



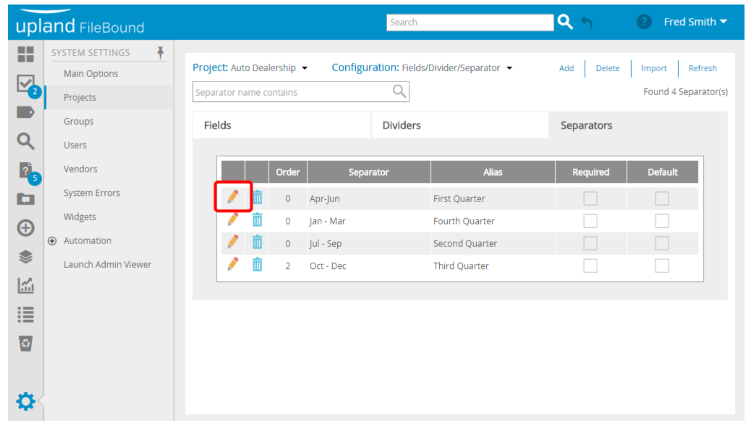
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



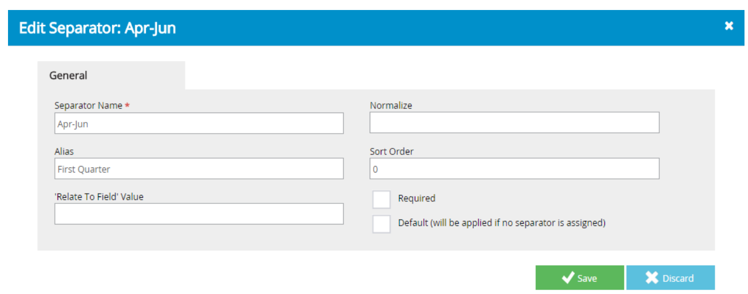
5. Open Edit Separator Dialog Box

1. Click the **Separators** tab.
2. Click the edit button adjacent to the separator you want to delete.
   The **Edit Separator** dialog box opens.



6. Edit the Separator Properties

- Edit the separator information, and then click **Save**.

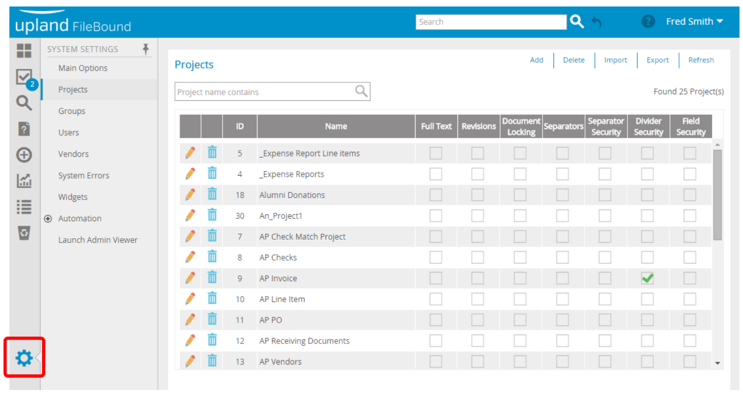


How do I edit the properties of a divider?

This lesson shows you how to edit the properties of a divider.

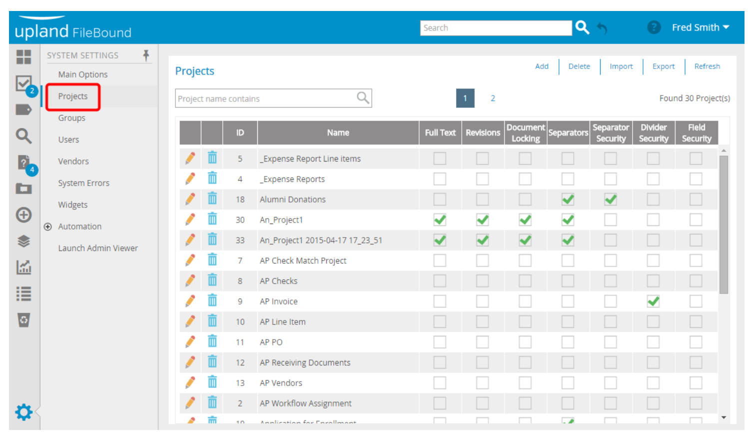
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



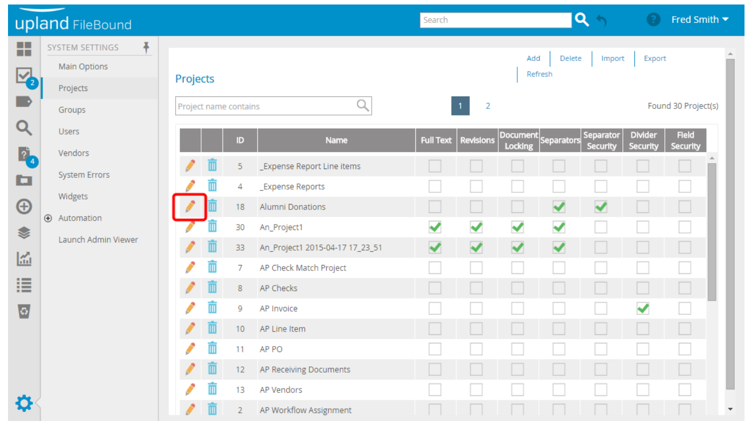
2. Click Projects

- Click **Projects**. The **Projects** page appears.



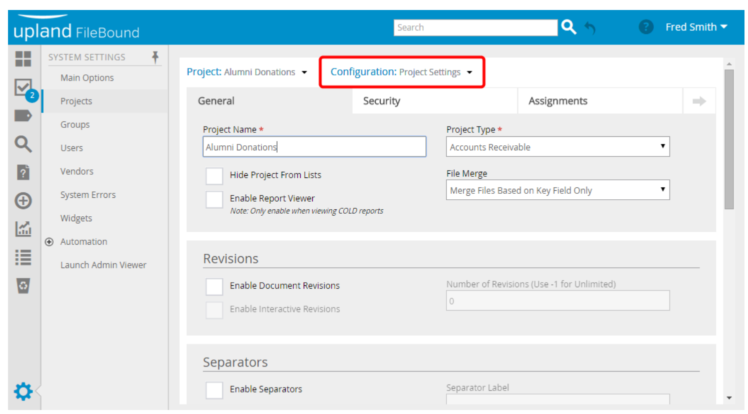
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



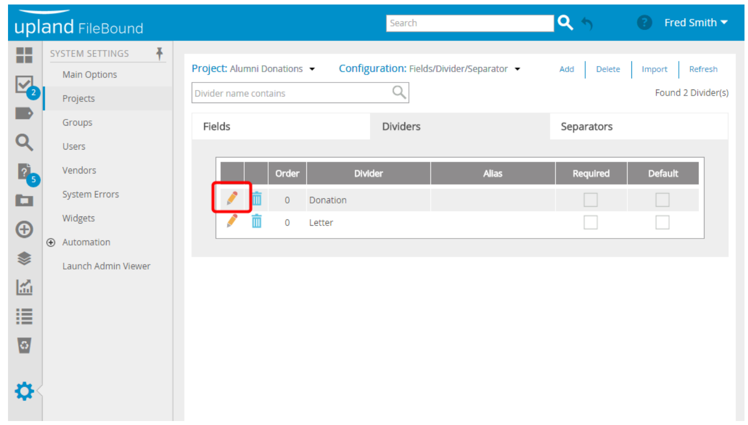
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



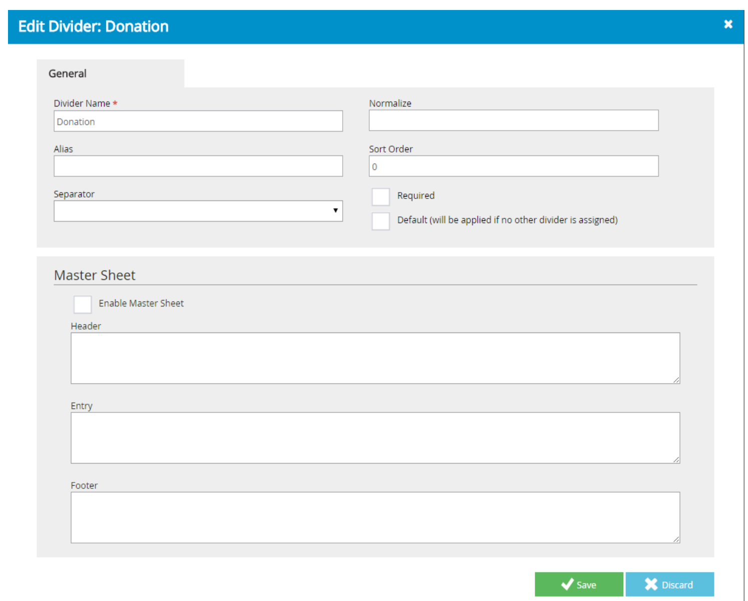
5. Open Edit Divider Dialog Box

1. Click the **Dividers** tab.
2. Click the edit button adjacent to the divider you want to edit.
   The **Edit Divider** dialog box opens.



6. Edit the Divider Properties

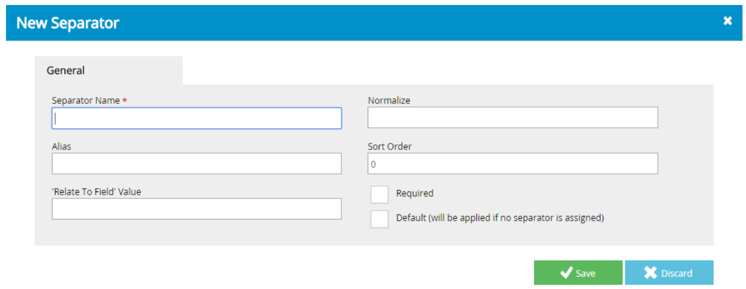
- Edit the divider information, and then click **Save**.



What are the properties of a separator?

This lesson provides information about the properties of a separator.

Separator Properties



Order: This box allows users to specify the order that separators are displayed in a viewer.

Separator Name: This box allows users to specify a name for the separator.

Normalize: This box allows users to specify an alternative name for the separator.

Alias: This box allows users to specify an alias name for the separator.

'Relate To Field' Value: This box allows users to manage the availability of the separator for the documents in a file.

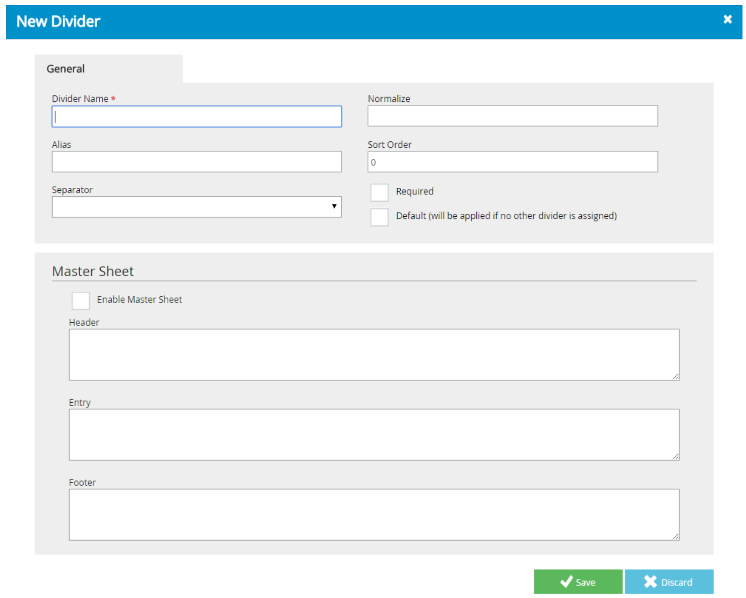
Required: This check box allows users to make the separator mandatory.

Default: This check box allows users to make the separator the default separator.

What are the properties of a divider?

This lesson provides information about the properties of a divider.

Divider Properties



Order: This box allows users to specify the order that dividers are displayed in a viewer.

Divider Name: This box allows users to specify a name for the divider.

Normalize: This box allows users to specify an alternative name for the divider.

Alias: This box allows users to specify an alias name for the divider.

Separator: This list allows users to select a separator name to associate the separator with the divider.

Required: This check box allows users to make the divider mandatory.

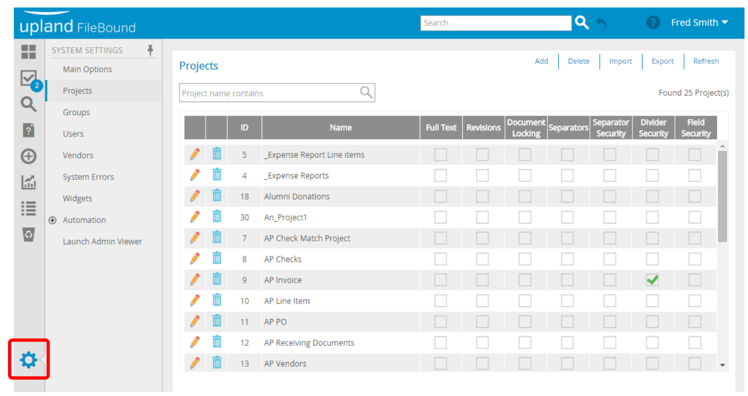
Default: This check box allows users to make the divider the default divider.

How do I specify the order in which the separators are displayed within a document viewer?

This lesson shows you how to specify the order in which the separators are displayed within a viewer.

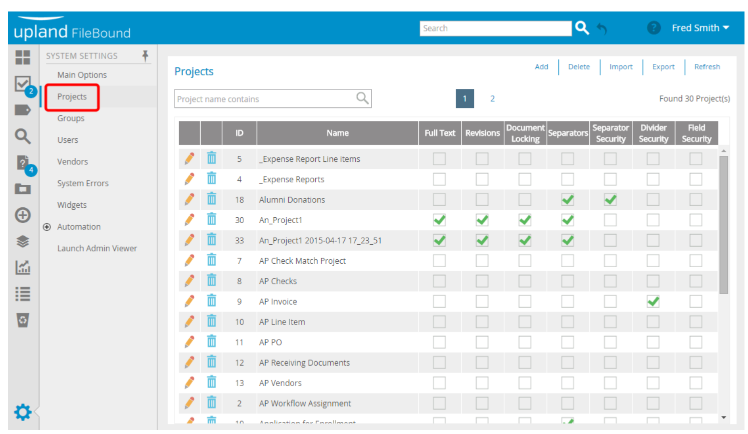
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



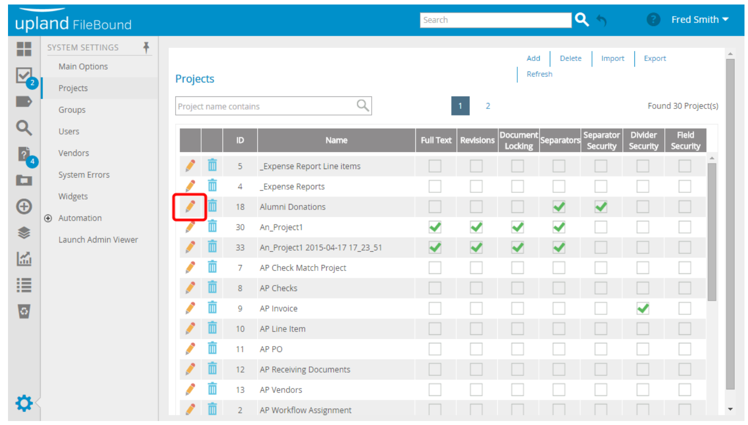
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



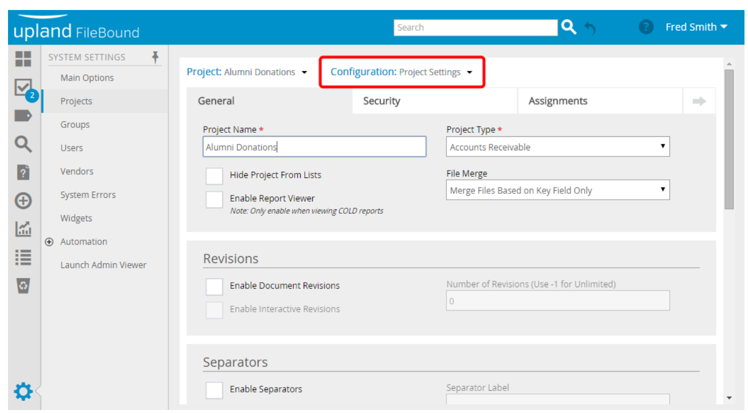
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



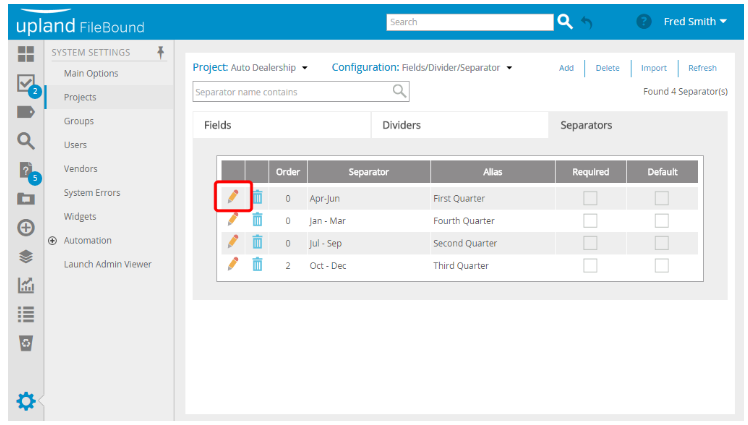
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



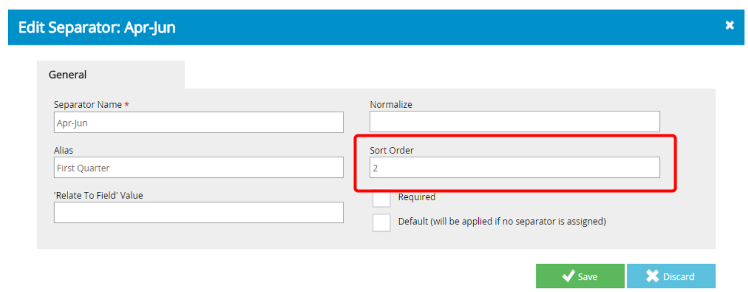
5. Open Edit Separator Dialog Box

1. Click the **Separators** tab.
2. Click the edit button adjacent to the separator you want to edit.
   The **Edit Separator** dialog box opens.



6. Specify the Order of the Separator

- You can specify the position of the separator within the list of separators by typing the numerical order in the **Sort Order** box.
  By default, WebDocs arranges separators in alphabetical order.

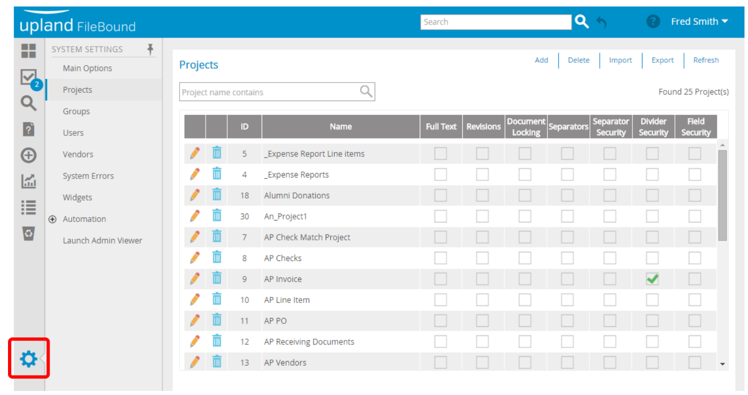


How do I specify the order in which dividers are displayed within a document viewer?

This lesson show you how to specify the order that dividers are displayed within the Viewer or the Web Viewer.

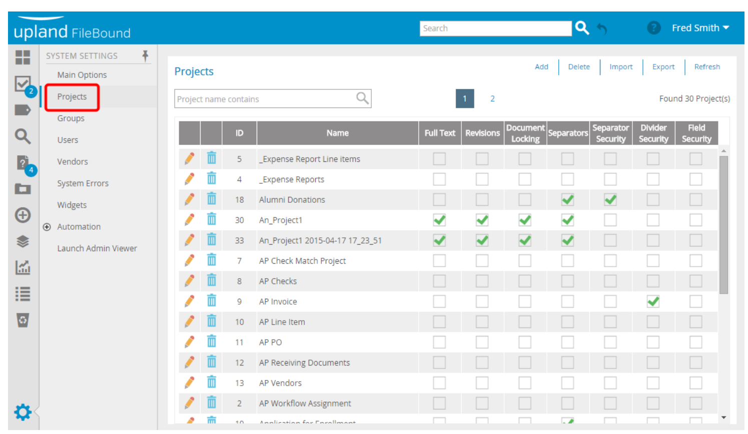
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



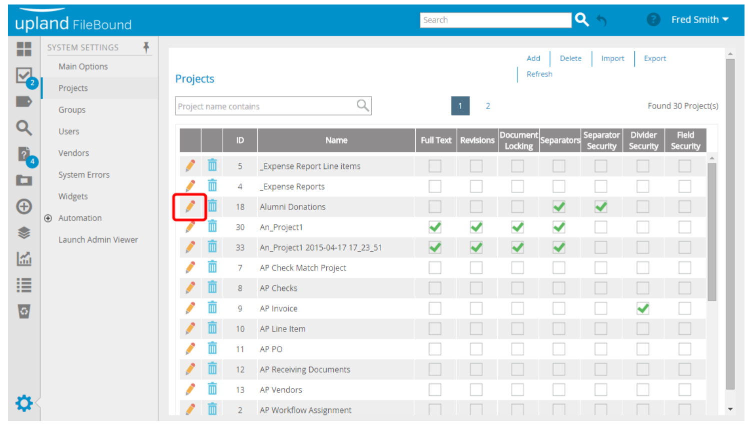
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



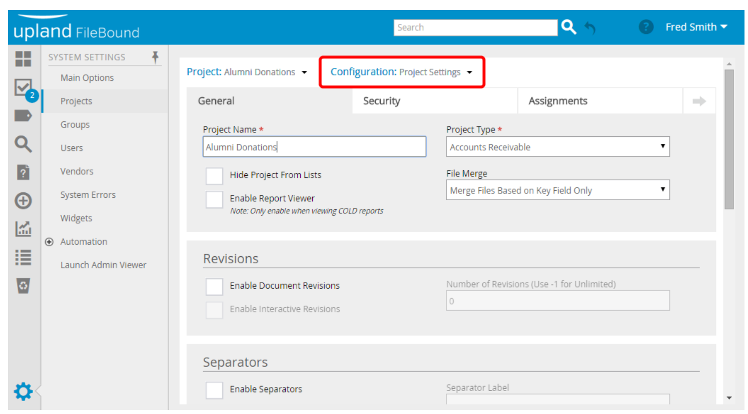
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



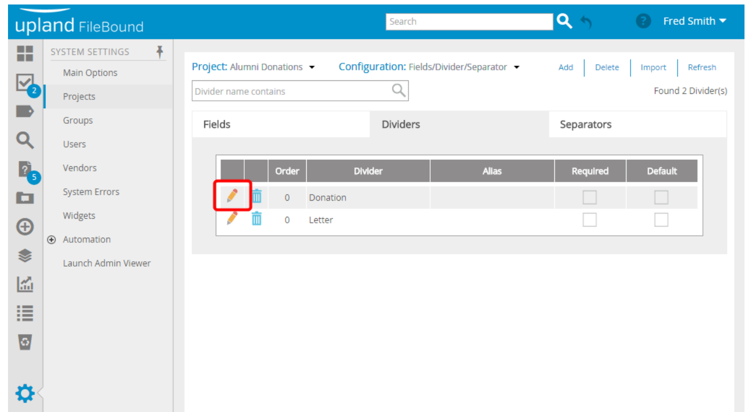
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



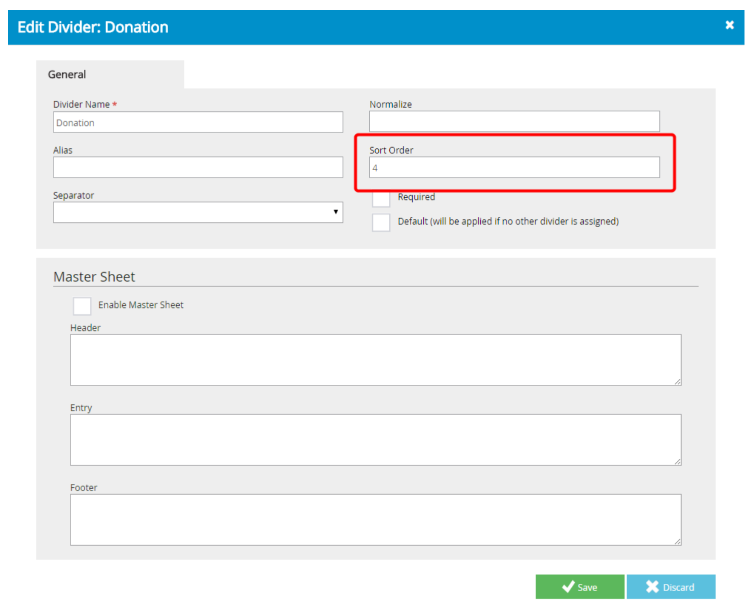
5. Open Edit Divider Dialog Box

1. Click the **Dividers** tab.
2. Click the edit button adjacent to the divider you want to edit.
   The **Edit Divider** dialog box opens.



6. Specify the Order of the Divider

1. You can specify the position of the divider within the list of dividers by typing the numerical order in the **Sort Order** box.
   By default, WebDocs arranges dividers in alphabetical order.
2. Click **Save**.

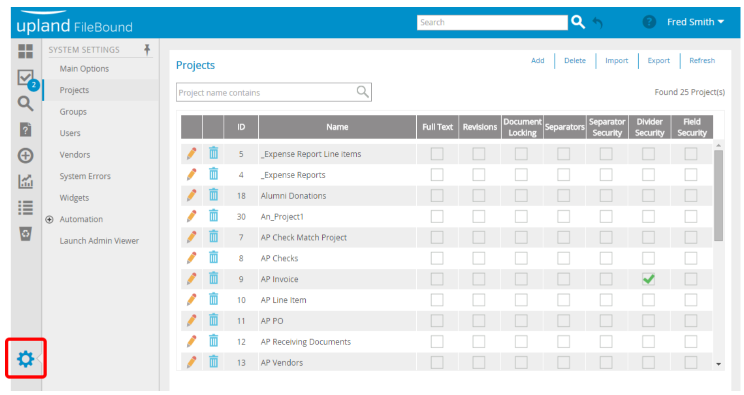


How do I use a separator Alias?

You can substitute the original separator name by an alias name, while generating barcode index for the documents. This is helpful when the separator name is very long or contains a lot of punctuations. This lesson shows you how to use a separator alias.

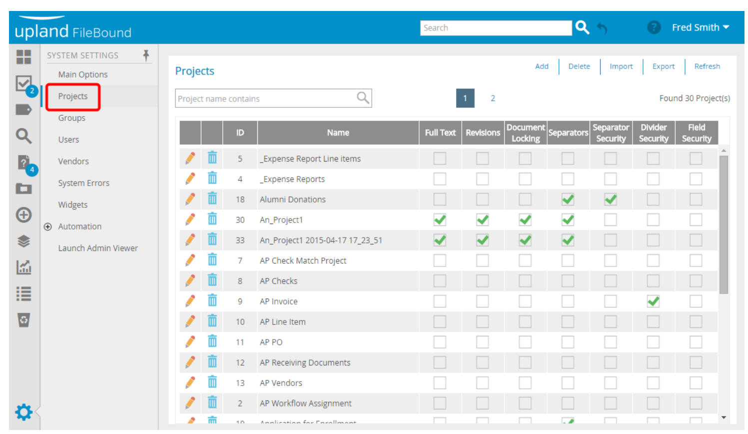
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



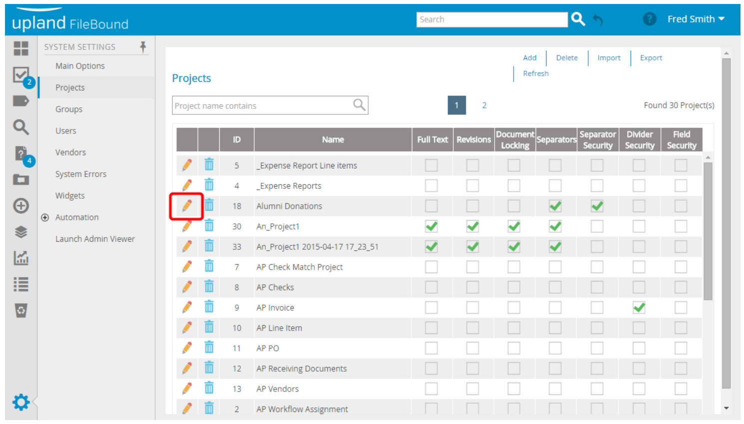
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



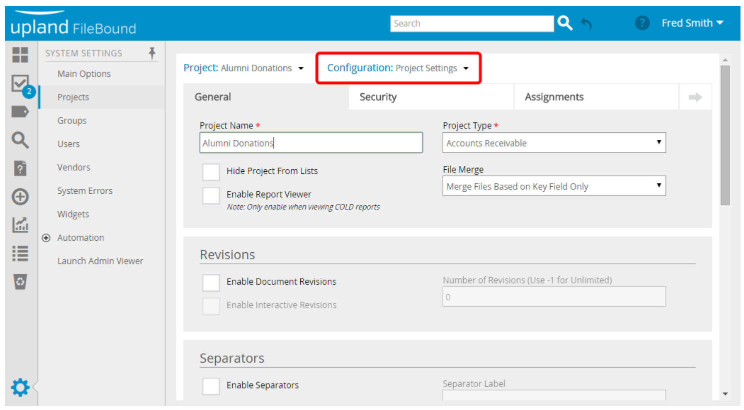
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



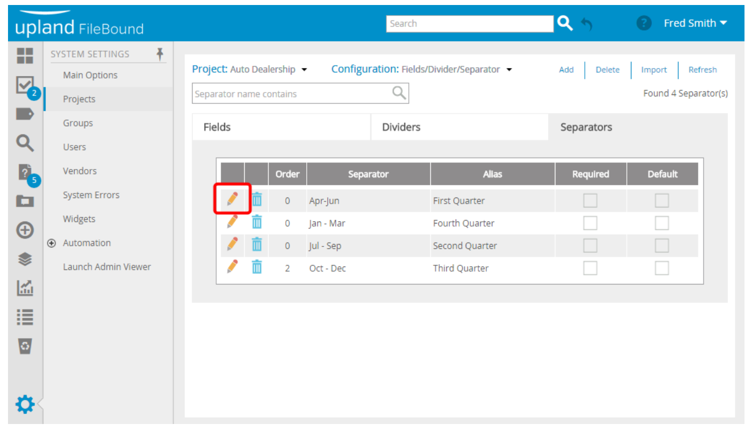
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



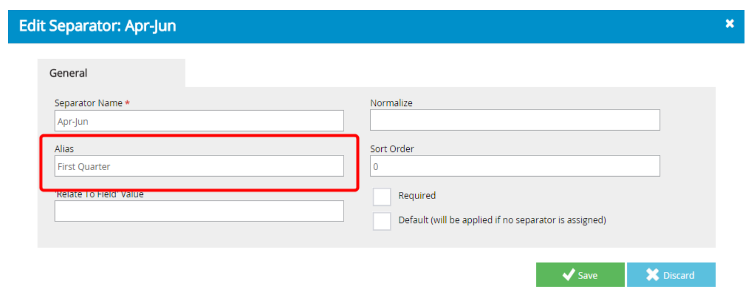
5. Open Edit Separator Dialog Box

1. Click the **Separators** tab.
2. Click the edit button adjacent to the separator you want to edit.
   The **Edit Separator** dialog box opens.



6. Specify an Alias Name

- You can specify an easy alias name for the separator by typing in the **Alias** box.

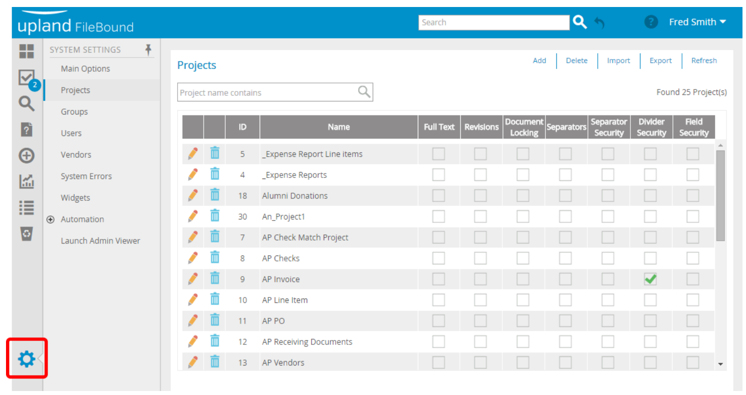


How do I use a divider alias?

You can substitute the original divider name with an alias name when using barcodes to identify the divider documents will be located in during scanning and importing. This is helpful when a divider name is very long or contains spaces or a lot of punctuation. This lesson shows you how to use a divider alias.

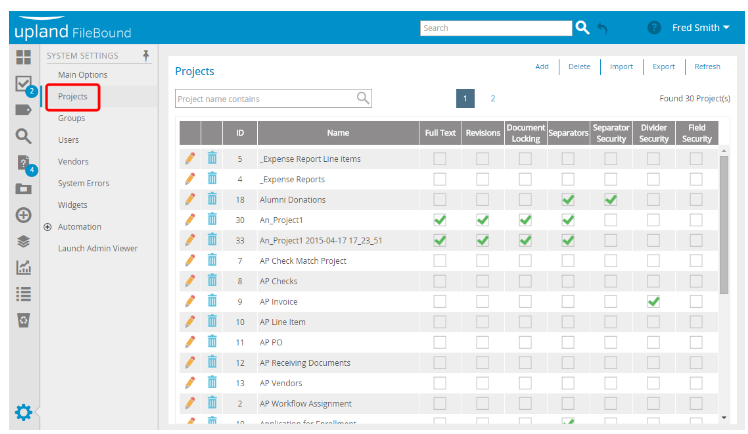
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



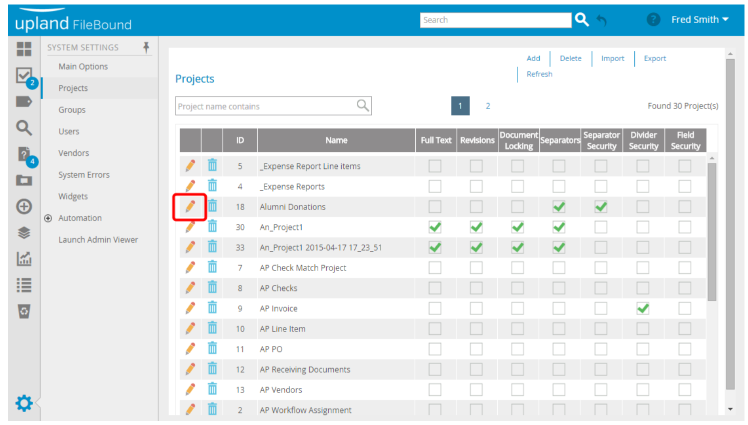
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



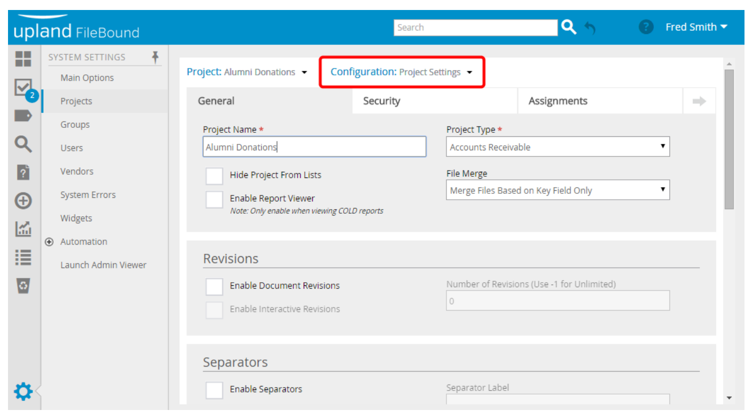
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



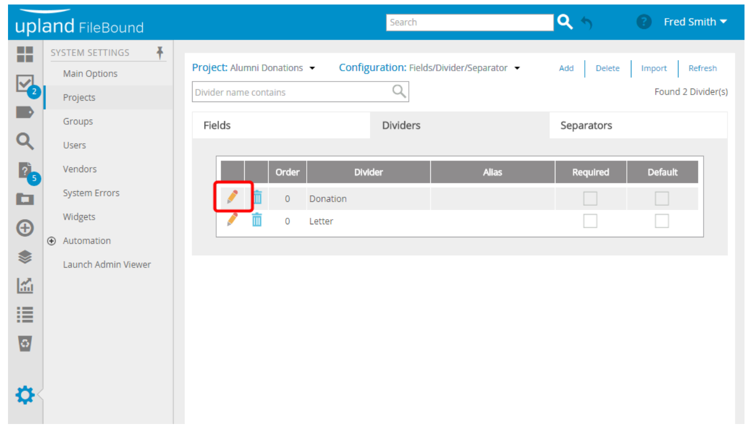
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



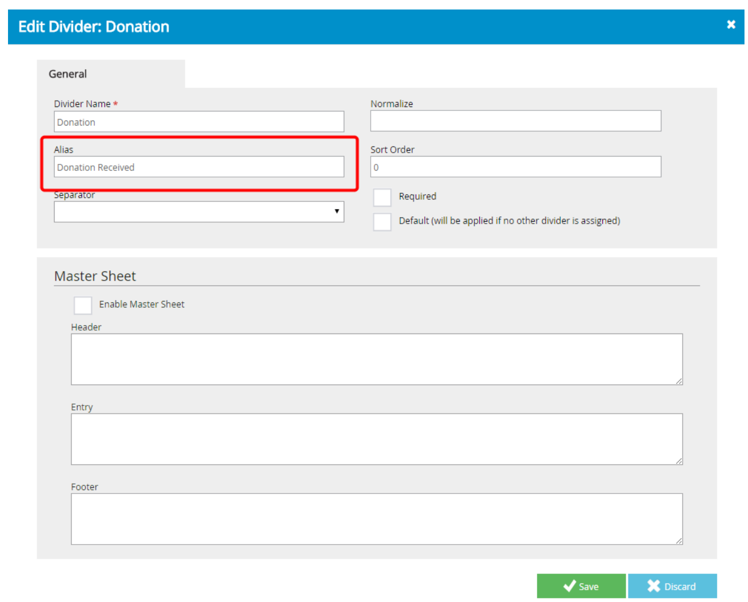
5. Open Edit Divider Dialog Box

1. Click the **Dividers** tab.
2. Click the edit button adjacent to the divider you want to edit.
   The **Divider** dialog box opens.



6. Specify an Alias Name

1. You can specify an easy alias name for the divider by typing in the **Alias** box.
2. Click **Save**.

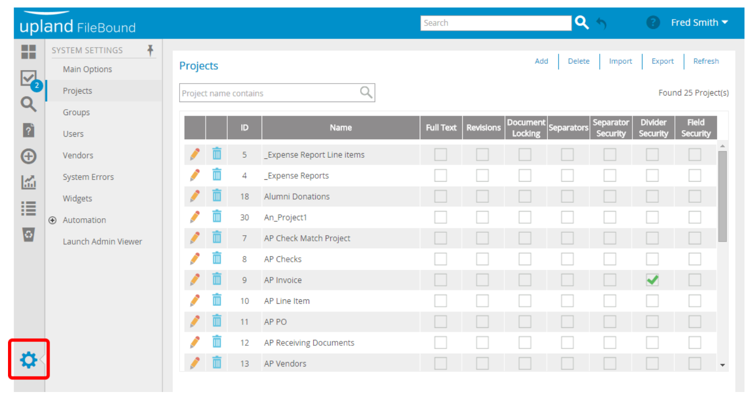


How do I associate a divider with a separator?

This lesson shows you how to associate a divider with a separator.

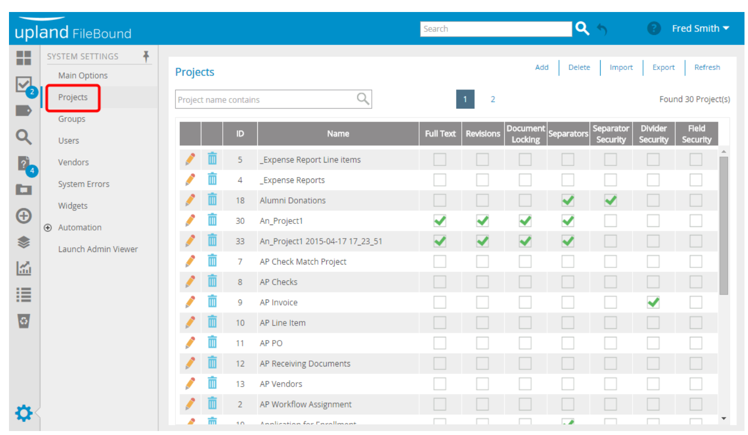
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



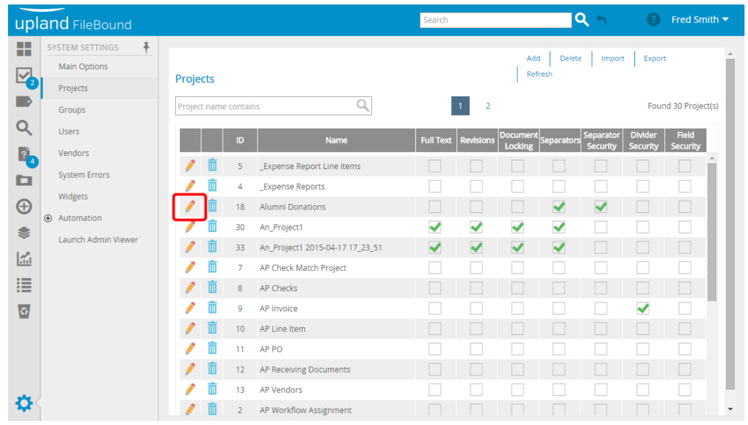
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



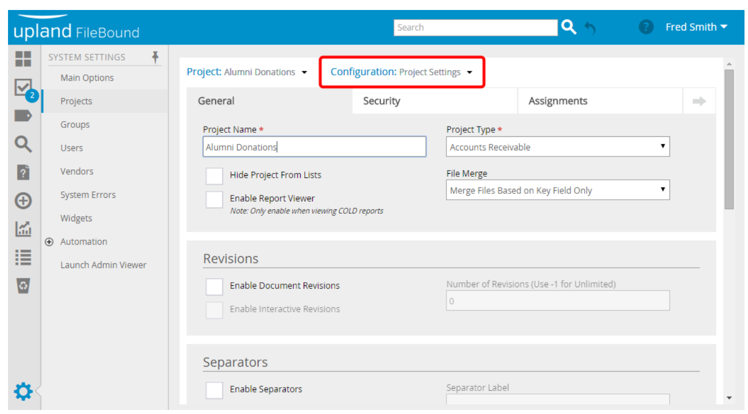
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



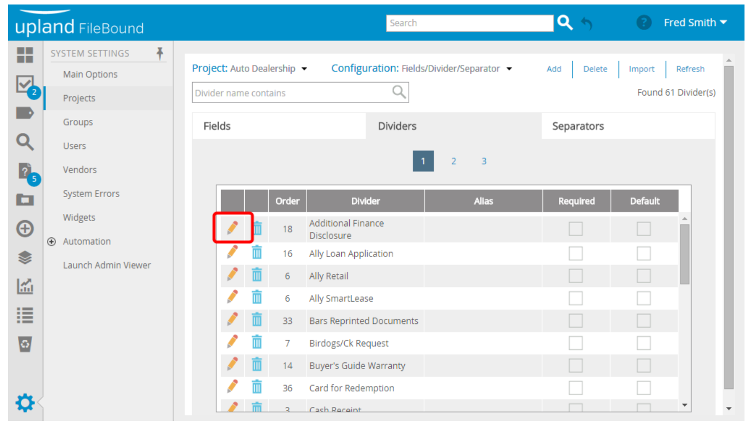
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



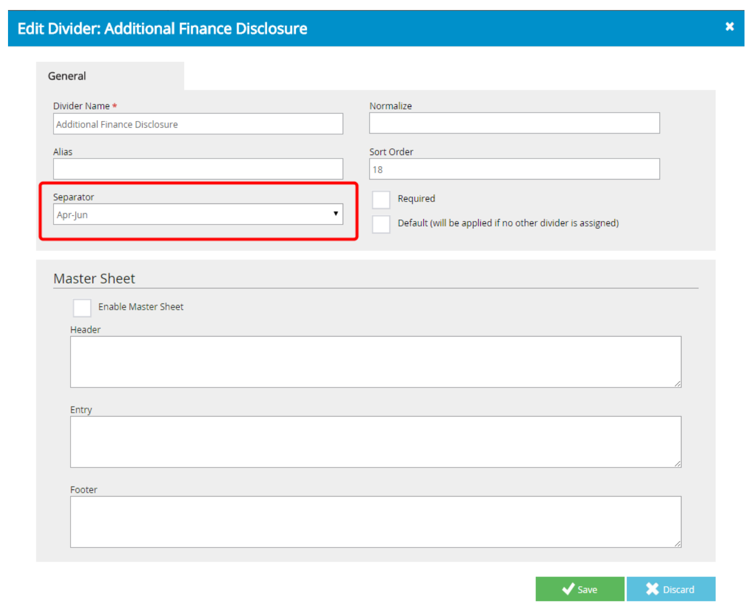
5. Open Edit Divider Dialog Box

1. Click the **Dividers** tab.
2. Click the edit button adjacent to the divider you want to edit.
   The **Edit Divider** dialog box opens.



6. Select a Separator

1. Select a separator name from the **Separator** list to associate a separator with the divider.
   Note: The **Viewer** displays the dividers, associated with the separator while adding a new document.
2. Click **Save**.



How do I enable the Master Sheet for a divider?

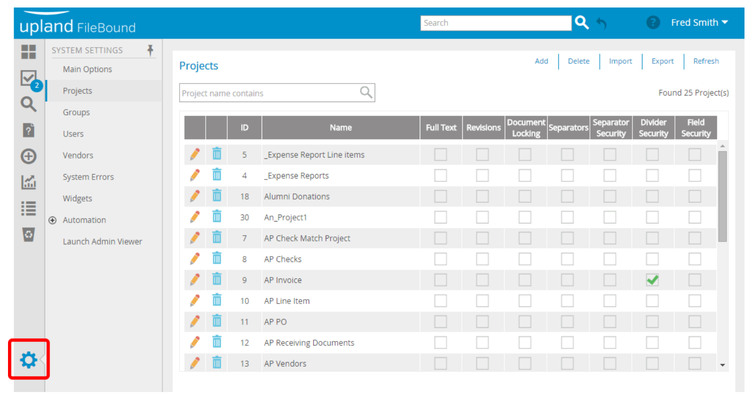
Master sheet is an HTML document that is associated with dividers and allows you to add notes for files. The notes displays the name of the user, date, and time stamp when the note was added. You can specify HTML parameters that are used while generating master sheet for a file for the first time.

Note: Master sheet parameters are set for a project and are applicable to all the files in the project.

This lesson shows you how to enable the master sheet for a divider.

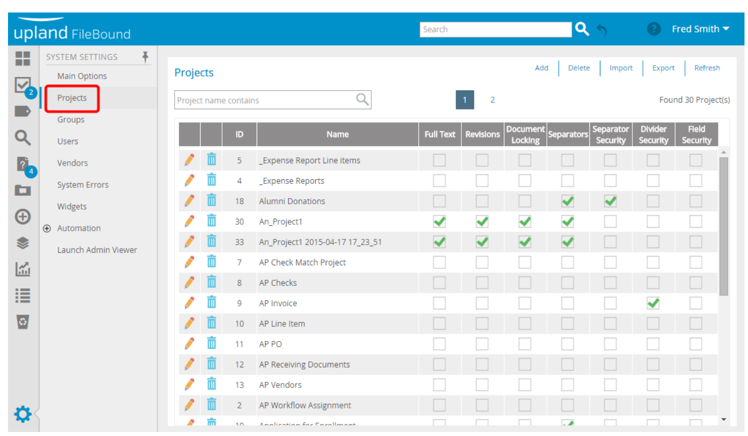
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



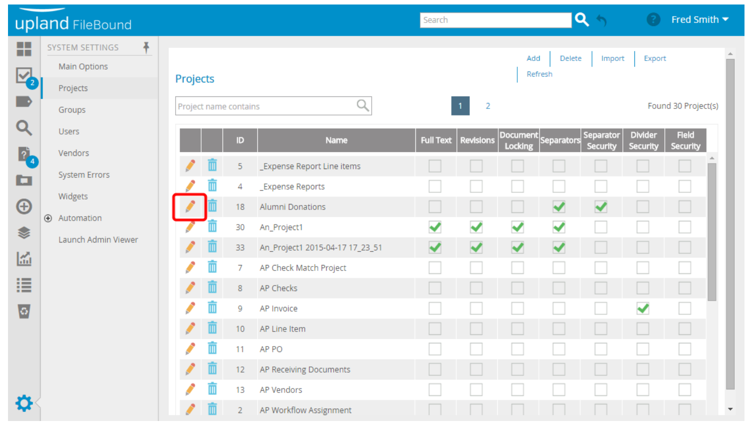
2. Click Projects

- Click **Projects**.
  The **Projects** page appears.



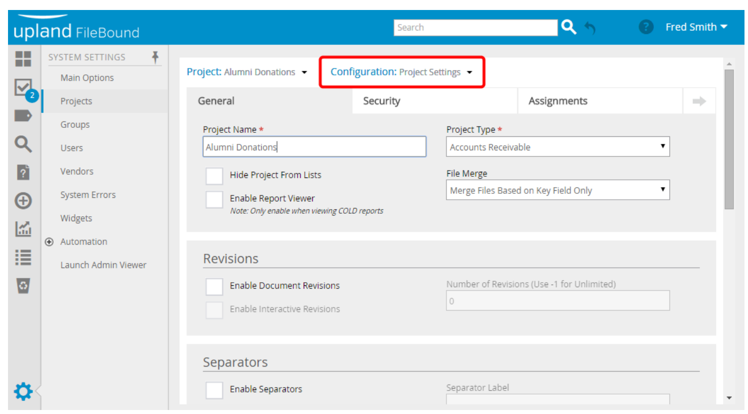
3. Open Project Configuration Page

- Click the edit icon adjacent to the project you want to edit.
  The project configuration page appears.



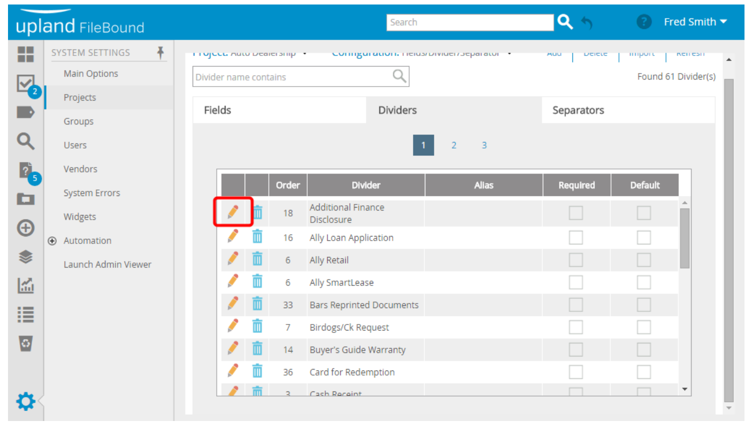
4. Select Fields/Dividers/Separators

- Select **Fields/Dividers/Separators** from the **Configuration** list on the toolbar.



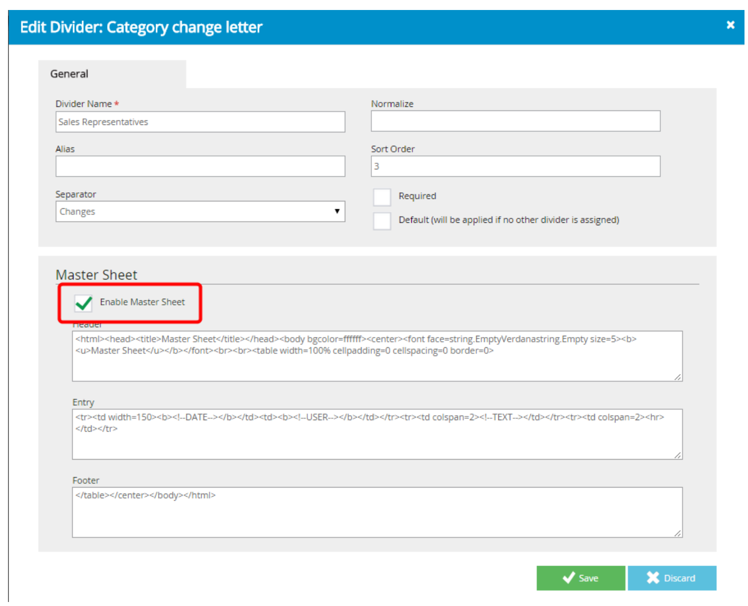
5. Open New Divider Dialog Box

1. Click the **Dividers** tab.
2. Click **Add** on the toolbar.
   The **New Divider** dialog box opens.



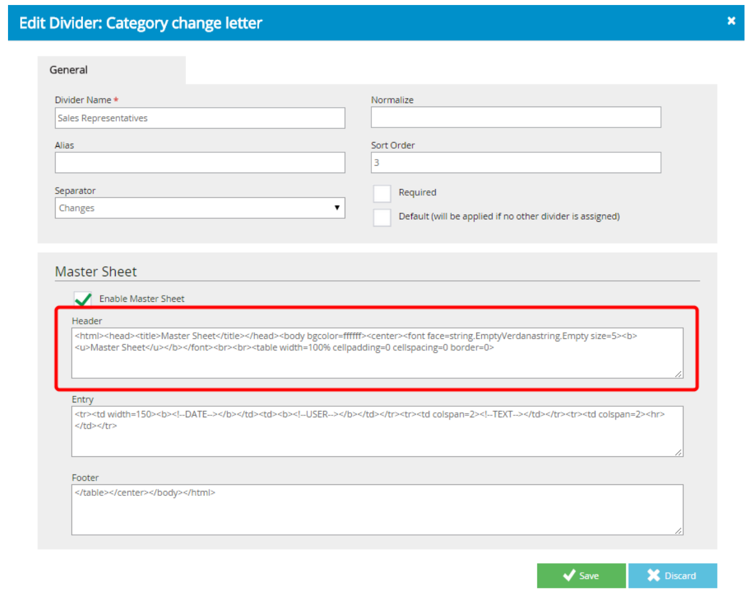
6. Select the Enable Master Sheet Check Box

- Select the **Enable Master Sheet** check box.
  The default HTML parameters are displayed in the **Header**, **Entry**, and **Footer** boxes.



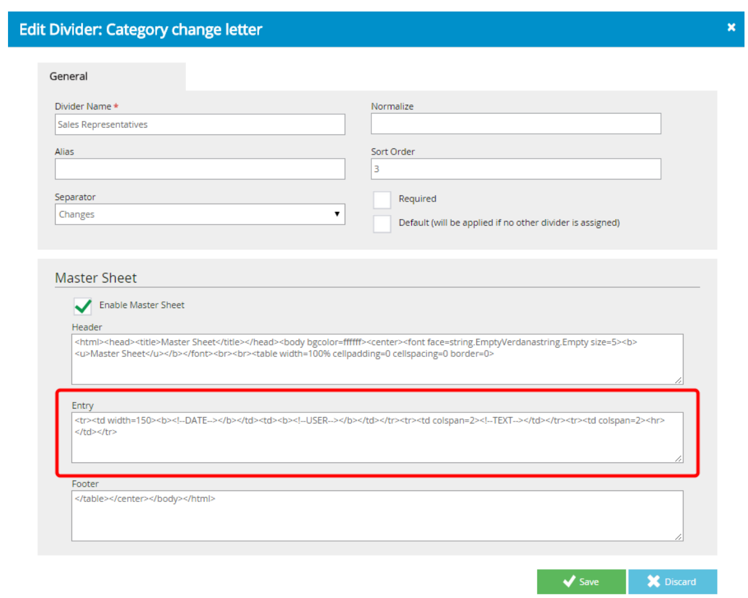
7. Update the Header Parameters

- You can update the HTML parameters for the header from the **Header** box.



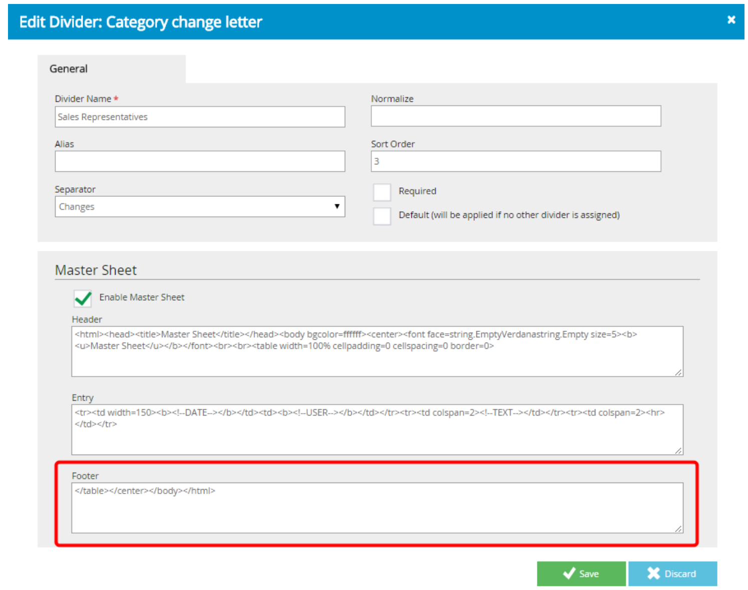
8. Update the Entry Parameters

- You can update the HTML parameters for the entry from the **Entry** box.



9. Update the Footer Parameters

1. You can update the HTML parameters for the footer from the **Footer** box.
2. Click **Save**.



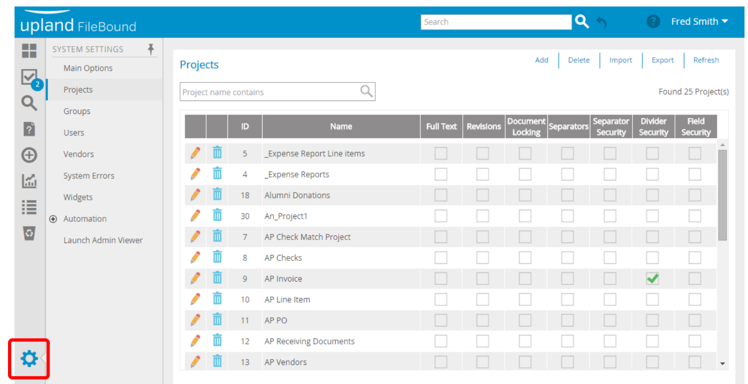
Creating a User

How do I add a new user?

This lesson shows you how to add a new user.

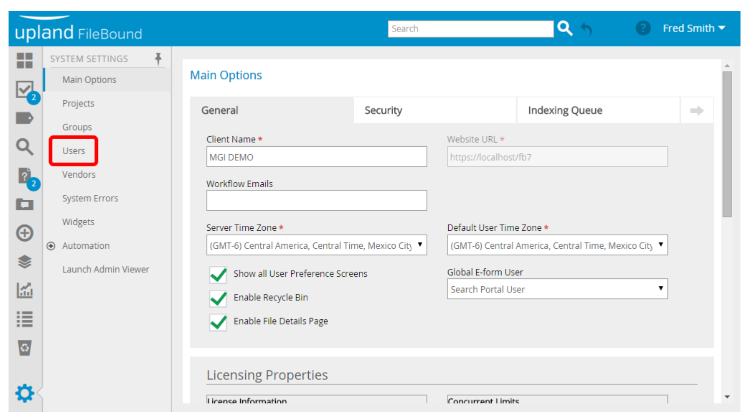
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



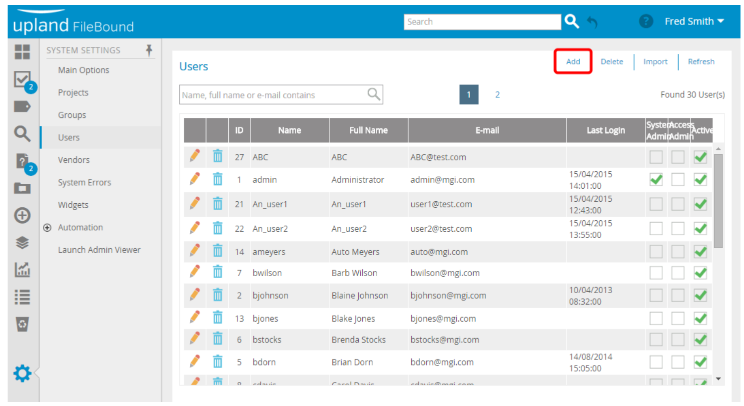
2. Click Users

- Click the **Users** icon. The **Users** page appears.



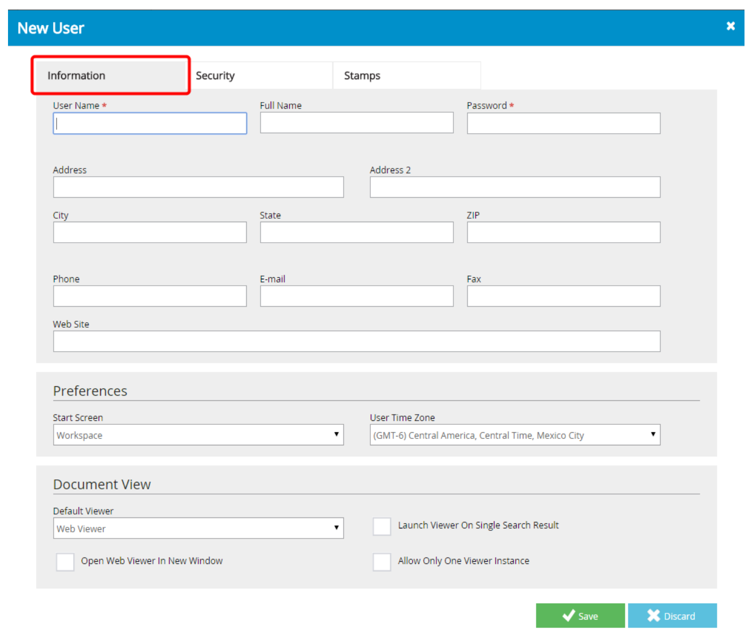
3. Open New User Dialog Box

- Click **Add** on the toolbar.
  The **New User** dialog box opens.



4. Specify the User Information

1. Click the **Information** tab.
2. Specify the name of the user in the **User Name** box.
3. Specify the password for the user in the **Password** box.
   Note: The **User Name** and **Password** are mandatory fields. You can implement password rules and restrictions using a scripting language on the server.
4. Specify rest of the information.
5. Click **Save** to save the details.



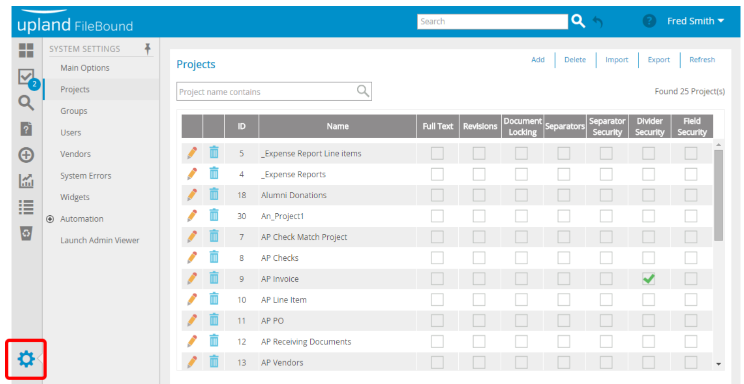
How do I delete a user?

This lesson shows you how to delete a user.

Note: Only System Administrators and Access Administrators can delete users in a WebDocs system.

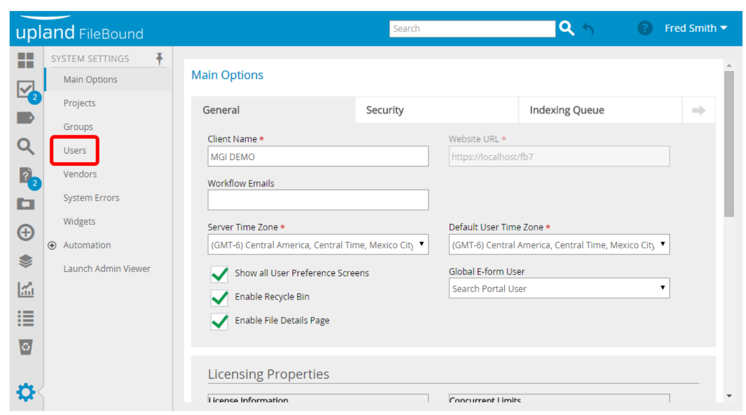
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



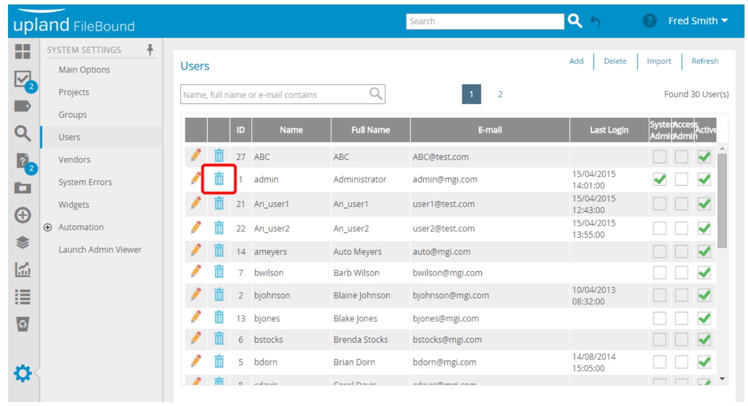
2. Click Users

- Click the **Users** icon. The **Users** page appears.



3. Delete a User

- Click the delete icon adjacent to the user you want to delete.
  The user is deleted after confirmation.



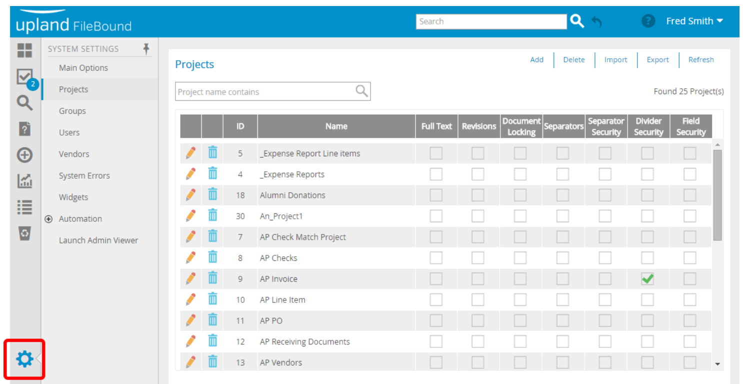
How do I edit a user?

This lesson shows you how to edit a user.

Note: Only System Administrators and Access Administrators can edit users in a WebDocs system.

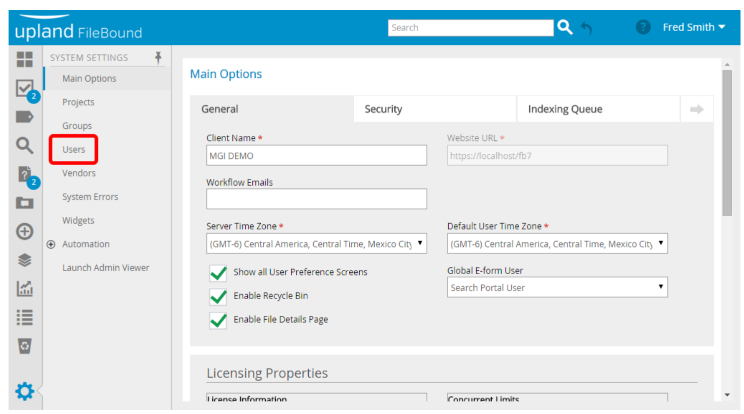
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



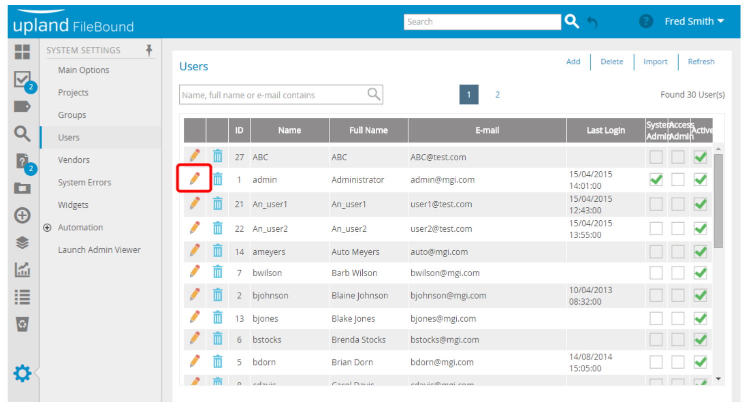
2. Click Users

- Click the **Users** icon. The **Users** page appears.



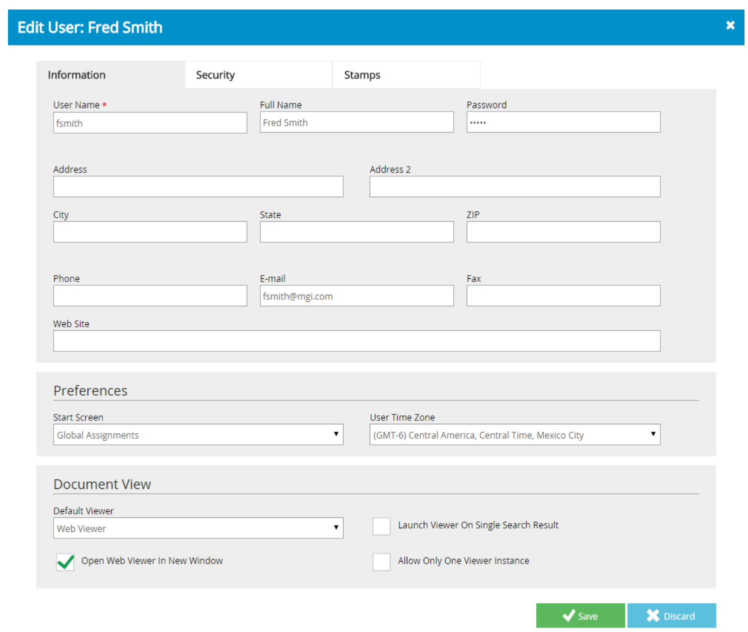
3. Open Edit User Dialog Box

- Click the edit button adjacent to the user you want to edit.
  The **Edit User** dialog box opens.



4. Edit a User

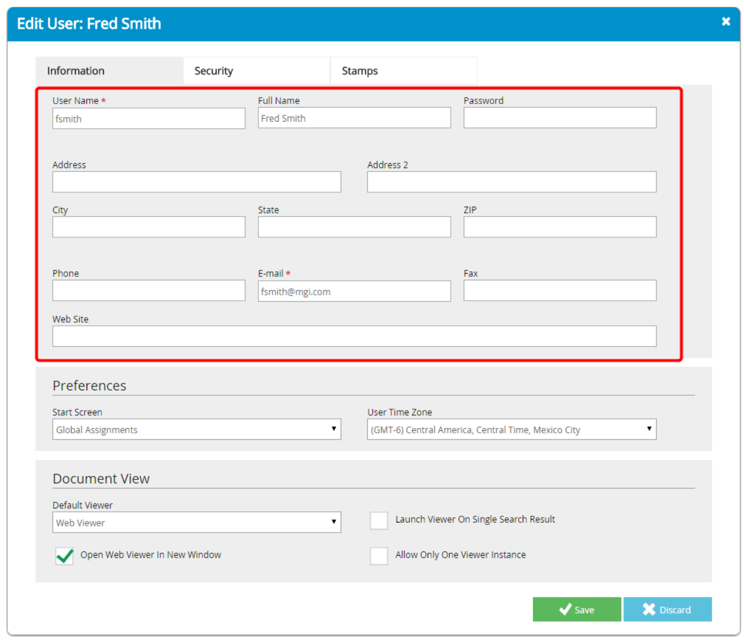
1. You can edit the user by clicking the appropriate tabs.
2. Click **Save** to save the changes.



What are the User Information properties?

This lesson provides information about the user information properties for a user. The user information like, user name, password, address, email address, phone number, and so on, are specified in the **Information** tab within the **User** dialog box.

User Information



User Name: This box allows you to specify a user name that the user will use to log on to WebDocs. *(Requried field when creating a new user.)*

Full Name: This box allows you to specify the full name of the user. This may also sometimes be referred to as the Display Name. This is the name that will be displayed when a list of users is displayed.

Password: This box allows you to specify a password that the user will use to log on to WebDocs. *(Requried field when creating a new user.)*

Address: This box allows you to specify the address of the user.

Address2: This box allows you to specify the remaining part of the address of the user.

City: This box allows you to specify the name of the city the user is residing.

State: This box allows you to specify the name of the state the city is located in.

ZIP: This box allows you to specify the zip code of the area user is residing.

Phone: This box allows you to specify the phone number of the user.

E-mail: This box allows you to specify the email address of the user. *(Requried field when creating a new user.)*

Fax: This box allows you to specify the fax number of the user

Web Site: This box allows you to specify the URL of the website of the user.

What are the User Preferences properties?

This lesson provides information about the user preferences properties. You can set preferences for individual users from the **Preferences** section under the **Information** tab within the **User** dialog box.

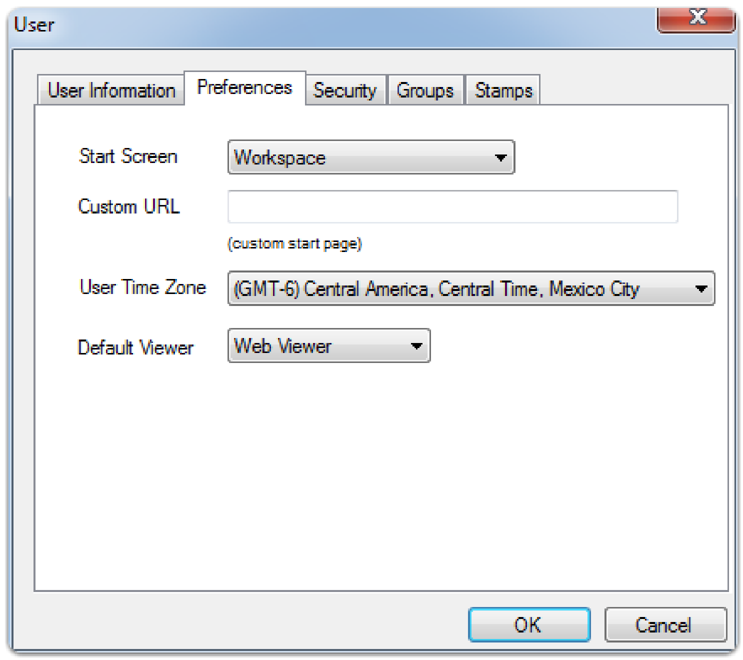
User Preferences

Start Screen: This option allows you to select the first page that is displayed after a user logs on to the system.

Custom URL: This option allows you to specify a URL, if the **Custom URL** option is selected from the **Start Screen** list.

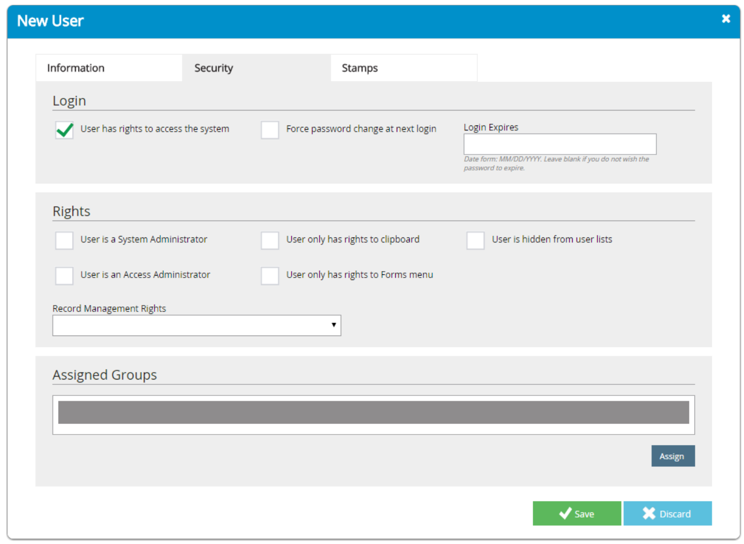
User Time Zone: This option allows you to specify the time zone that a user performs their work in.

Default Viewer: This option allows you to set the default viewer for the user.



What are the User Security properties?

This lesson provides information about the user security properties. You can implement security for a user from the **Security** tab within the **User** dialog box.



User has rights to access the system: This option enables the user to log on to WebDocs.

Force password change at next login: This option prompts the user to change password on the next logon.

Login Expires: This option allows you to specify a date that a user's password will expire. After this date the user will be prompted to enter a new password.

User is a System Administrator: This option sets the user account as a System Administrator.

User only has rights to clipboard: This option limits the user access to the WebDocs Clipboard.

User is hidden form user list: This option hides the user account from being displayed in lists of users.

User is an Access Administrator: This options sets the user as an Access Administrator.

User only has rights to Forms menu: This option limits the user access to only the Forms menu after logging on.

Record Management Rights: This list allows you to specify the record management rights for the user.

What can I do as an Access Administrator?

This lesson provides information on what you can do as an Access Administrator.

When you log on to WebDocs as an Access Administrator, you can administer groups and users from the WebDocs **Central Administration**, but you cannot access the Main Options or Project Options.

What can I do as a System Administrator?

This lesson provides information on what you can do as a System Administrator.

When you log on to WebDocs as a System Administrator, you have access to all the features of WebDocs, and you have rights to perform all the tasks. You can create, configure, and manage users, groups, projects, and vendors.

What am I not able to do as an Access Administrator?

This lesson provides information on what you are not able to do as an Access Administrator.

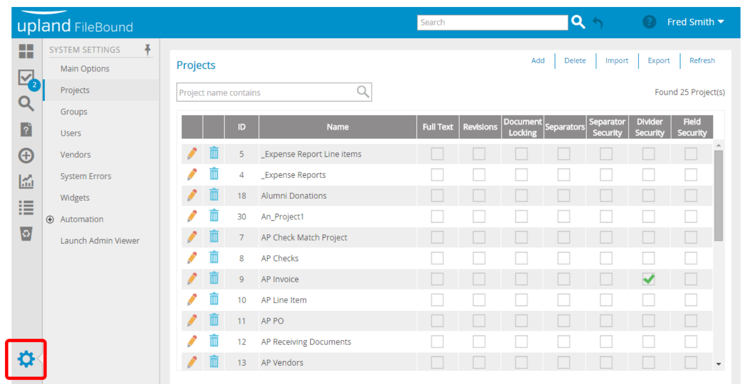
When you log on to WebDocs as an Access Administrator, you cannot create, configure, and mange, projects, vendors, and workflow, and access the Main Options or Project Options.

How do I make an annotation stamp only available to a specified user?

When you add an annotation stamp for a user from the **User** dialog box, that stamp is available only to that user. This lesson shows you how to make an annotation stamp only available to a specified user.

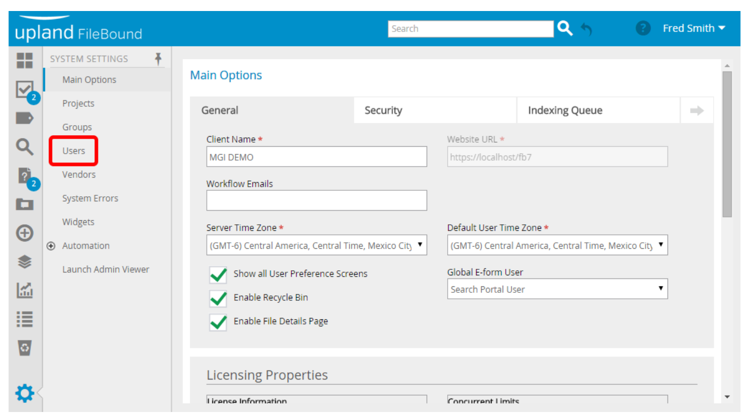
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



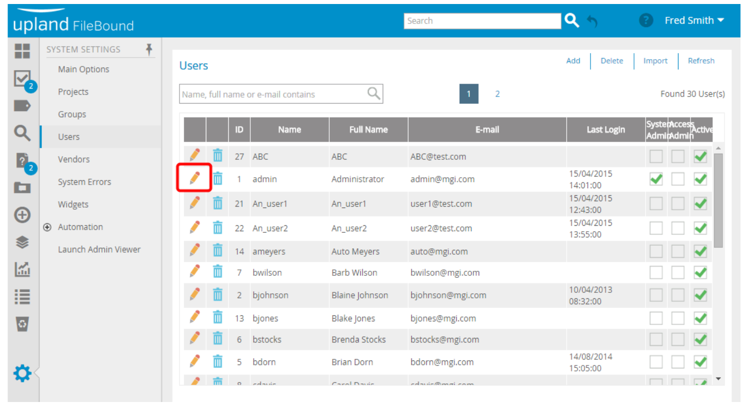
2. Click Users

- Click the **Users** icon.
  The **Users** page appears.



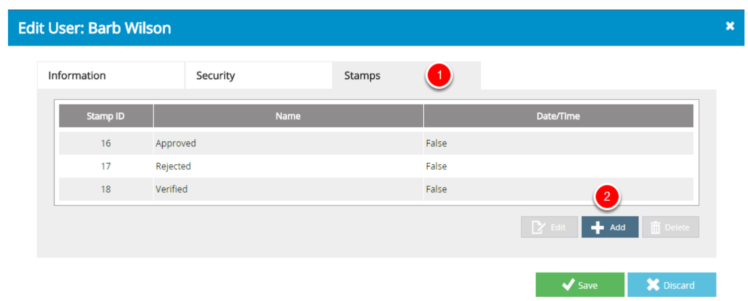
3. Open Edit User Dialog Box

- Click the edit button adjacent to the user you want to edit.
  The **Edit User** dialog box opens.



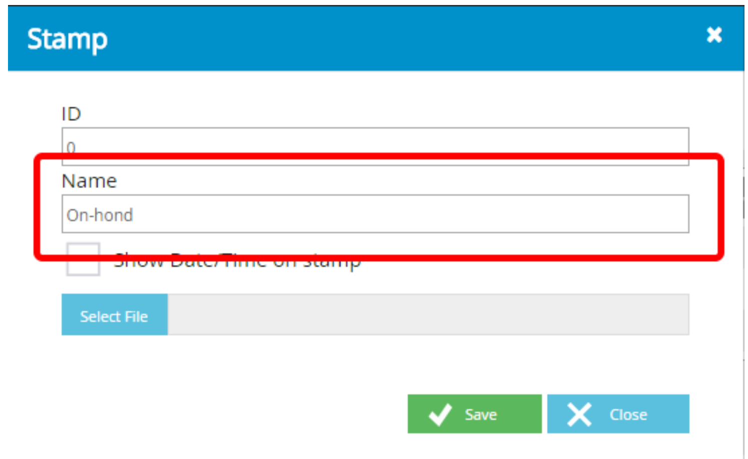
4. Click the Add Button

1. Click the **Stamps** tab.
2. Click **Add**.
   The **Stamp** dialog box opens.



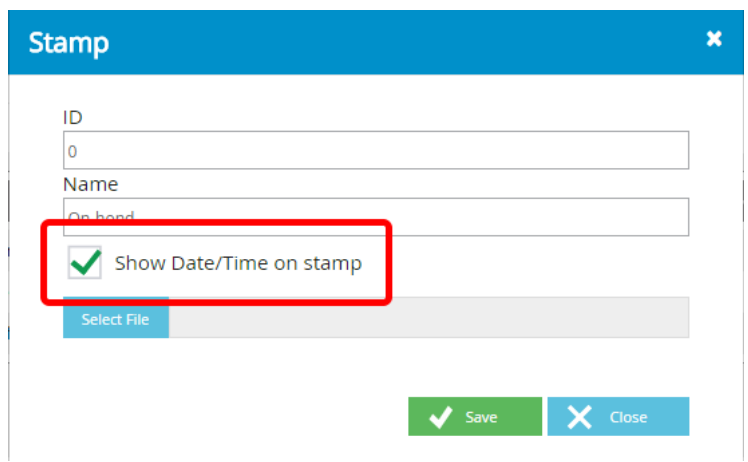
5. Specify a Name

- Specify a name for the stamp in the **Name** box. A unique identification number for the stamp is displayed in the **ID** box.



6. Select the Date/Time on Stamp Check Box (Optional)

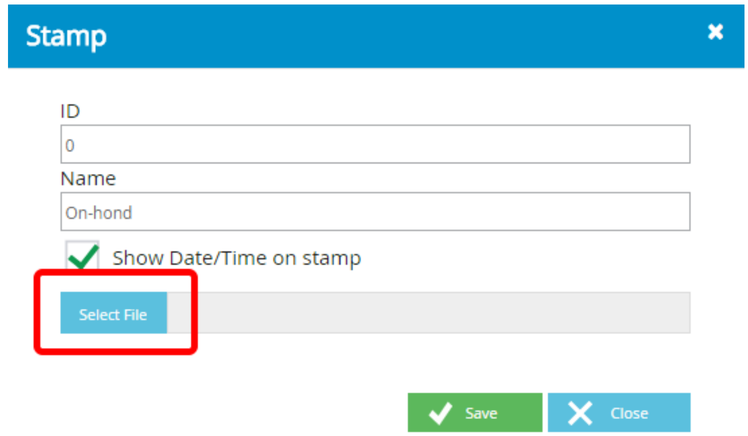
- To include the date and time on the image of the stamp, select the **Show Date/Time on Stamp** check box.



7. Click Browse For Stamp

1. Click **Select File** to select an image file for the stamp.
   The **Open** dialog box opens.
2. Select an image file from the dialog box, and then click **Open**.
3. Click **Save** within the **Stamp** dialog box, to save the stamp information.

Note: The stamp file format must be a .bmp 16 bit image.



What can I do as a Record Manager?

This article provides information on what you can do as Record Manager.

How do I manage records as a Record Manager?

When you log on to WebDocs as a Record Administrator, you can declare and un-declare a document as record, place a record on hold or remove hold from a record, and generate reports.

What can I do as a Legal Hold?

This lesson provides information on what you can do as a Legal Hold.

How do I manage Legal Holds on records?

When you log on to WebDocs as a Record Administrator, you can apply or remove a record on hold, and generate reports.

What can I do as a Record Administrator?

This lesson provides information on what you can do as a Record Administrator.

How can I manage records as a Record Administrator?

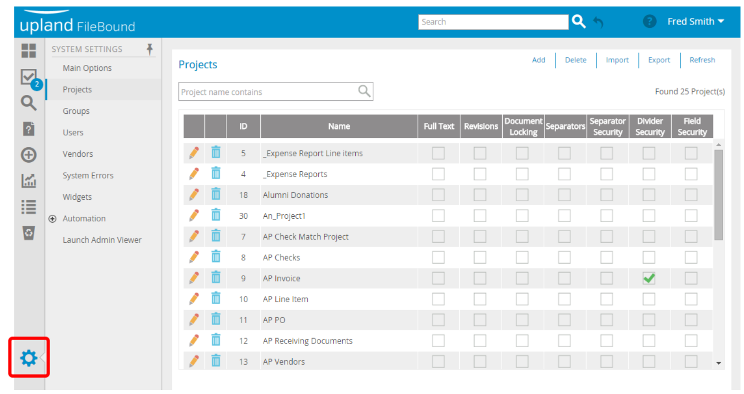
When you log on to WebDocs as a Record Administrator, you can assign rights to access Record Management to a user, create policies, approve and dismiss disposition, declare and un-declare a document as record, apply or remove a hold on a record, and generate reports.

How do I assign Records Management rights to a user?

This lesson shows you how to assign records management rights to a user.

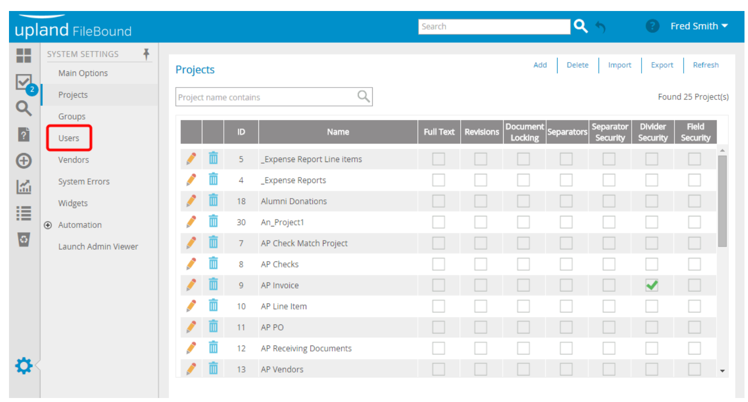
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



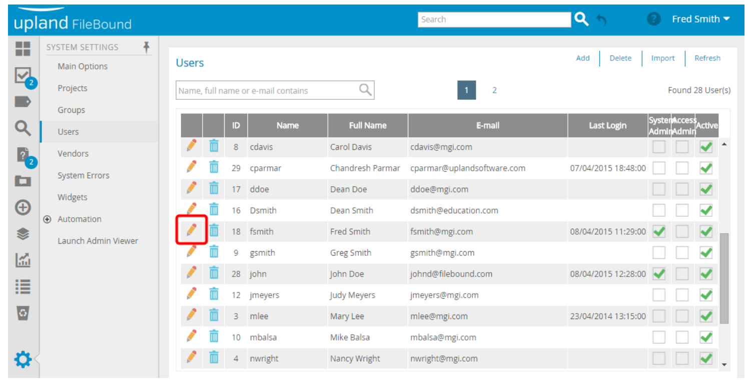
2. Click Users

- Click the **Users** icon. The **Users** page appears.



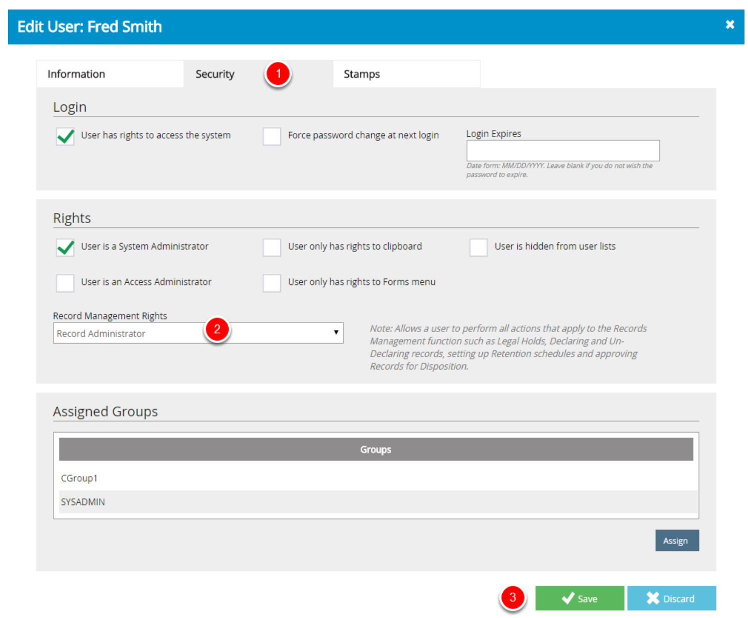
3. Open Edit User Dialog Box

- Click the edit button adjacent to the user you want to assign records management rights to. The **Edit User** dialog box opens.



4. Assign Records Management Rights

1. Click the **Security** tab.
2. Select an option from the **Records Management Rights** list.
   Following options are available:
   - **Legal Hold Manager**: This right allows a user to place a record on hold and remove hold from a record.
   - **Record Manager**: This right allows a user to declare and un-declare a document as record, put a record on-hold, and remove hold from a record.
   - **Records Administrator**: This right allows a user to perform all the activities a record manager can perform in addition to approving and dismissing disposition of records, and creating record series.



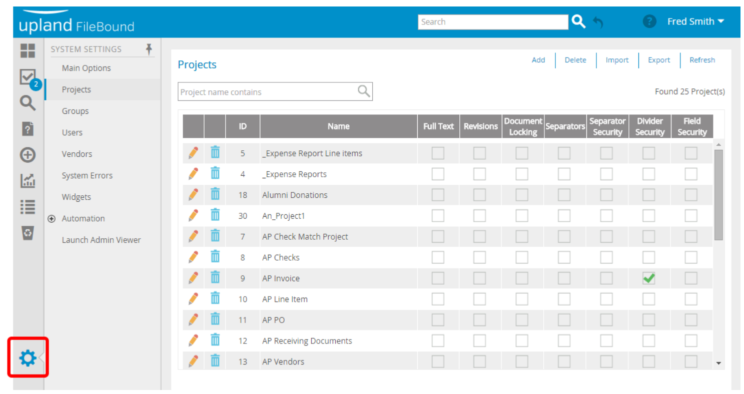
3. Click **Save** to confirm.

How do I assign groups to a user?

This lesson shows you how to assign groups to a user.

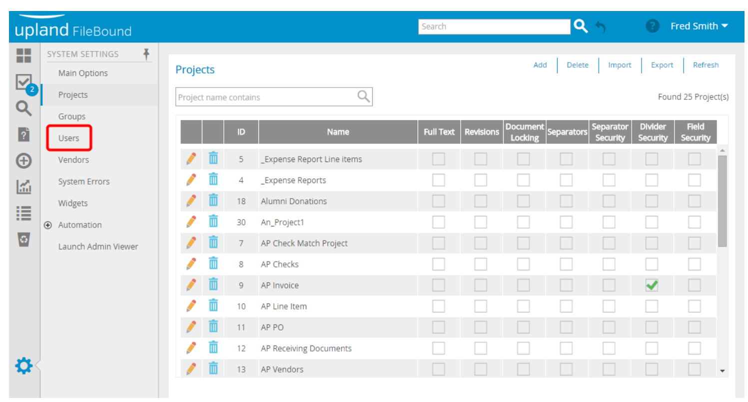
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



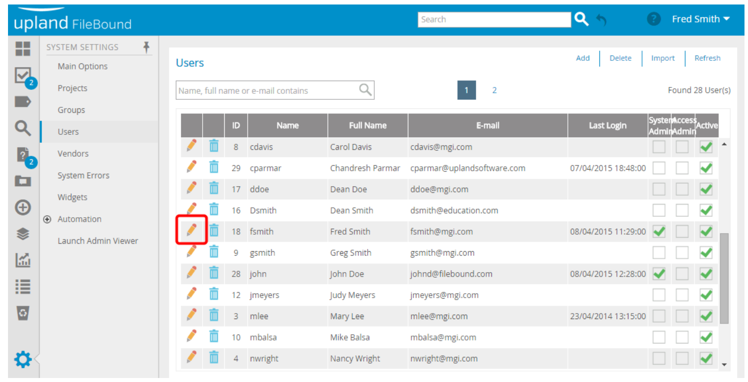
2. Click Users

- Click the **Users** icon. The **Users** page appears.



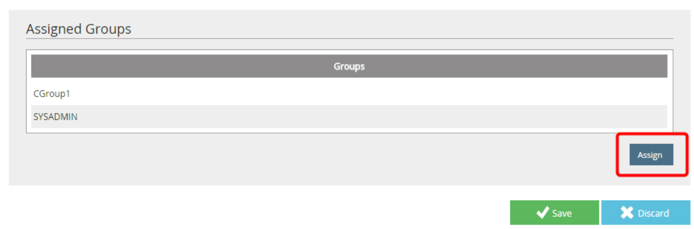
3. Open Edit User Dialog Box

- Click the edit button adjacent to the user you want to assign records management rights to. The **Edit User** dialog box opens.



4. Assign Group to a User

1. Click the **Assign** tab.
2. Click the **Assign** within the **Assigned Groups** section.
   The **Assign Groups** dialog box opens.

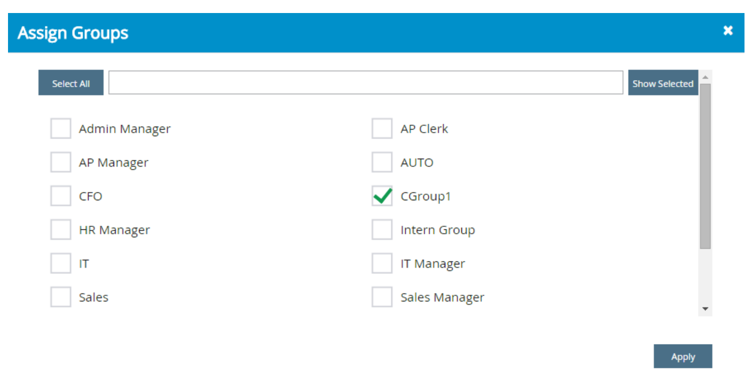


4.1 Select Users

1. Select the check box adjacent to the groups you want to add.

   Or,

   Click **Select All**, to select all the groups displayed within the dialog box.
2. Click **Apply**, to add the selected groups to the user.
3. Click **Save** at the bottom-right corner of the **Edit User** dialog box.



Creating a Group

What is a Group?

This lesson provides information about groups in WebDocs.

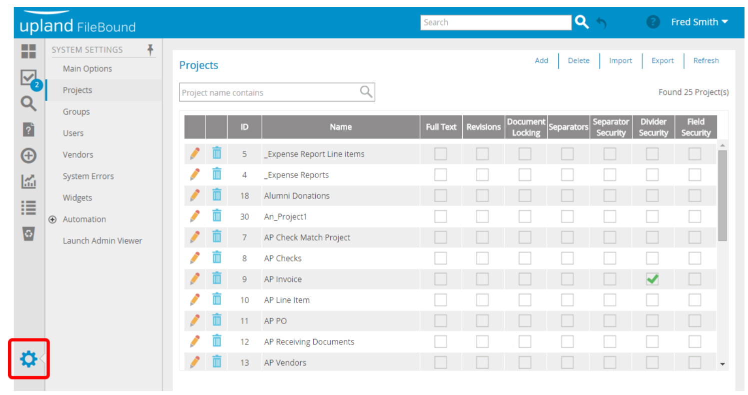
A WebDocs group is a collection of users with similar access rights that allows you to implement security for the WebDocs system. You can assign various rights related to files, documents, dividers, separators, annotations, and workflow to a group. WebDocs allow users to be assigned to one or more groups based on their roles in the system. You can configure the a group to specify what rights the users will have, which projects they will have access to, and what operations they can perform.

How do I add a group?

You can add groups in WebDocs to keep users with similar rights together. Rights configured for the group are applied to all users in the group. Groups can be added to WebDocs by a System Administrator or Access Administrator user. This lesson shows you how to add a group to WebDocs.

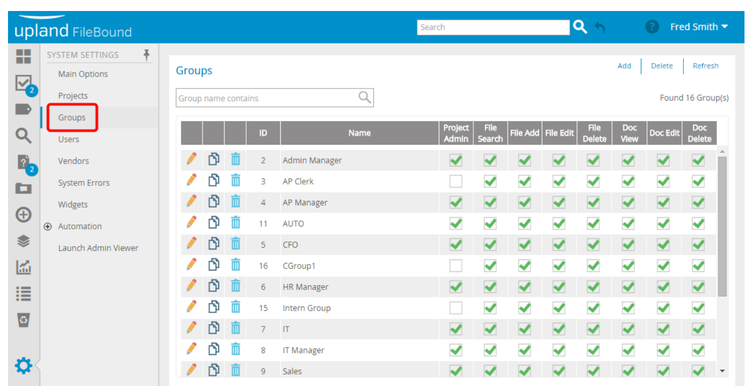
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



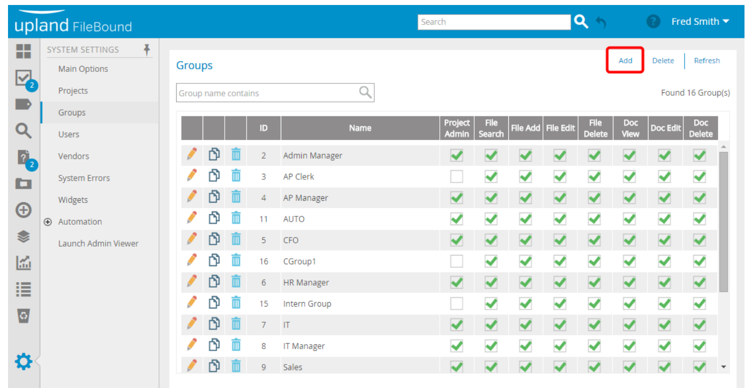
2. Click Groups

- Click the **Groups** icon. The right pane displays groups that are available.



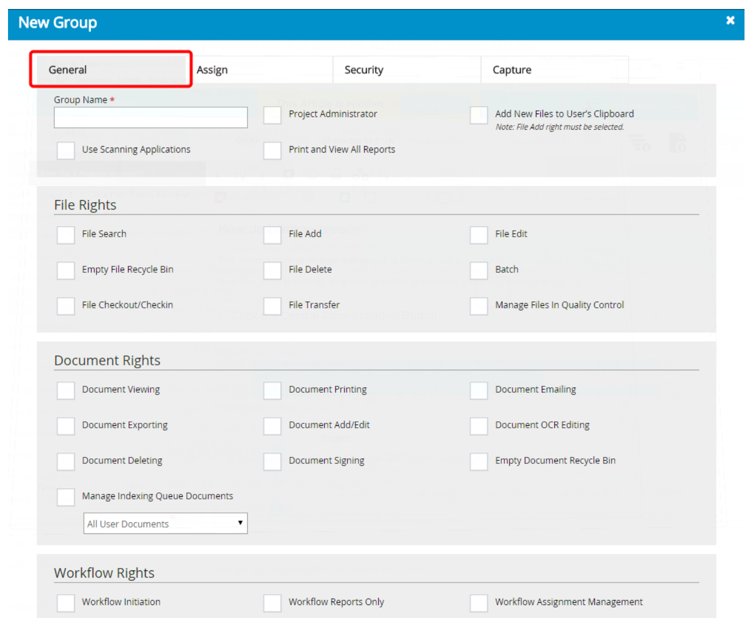
3. Open New Group Dialog Box

- Click **Add** on the toolbar.
  The **New Group** dialog box opens.



4. Specify Group Information

1. Click the **General** tab.
2. Specify the name of the group in the **Group Name** box.
3. Continue to select the appropriate group rights for the group.
4. Click **Save** at the bottom-right corner of the dialog box.



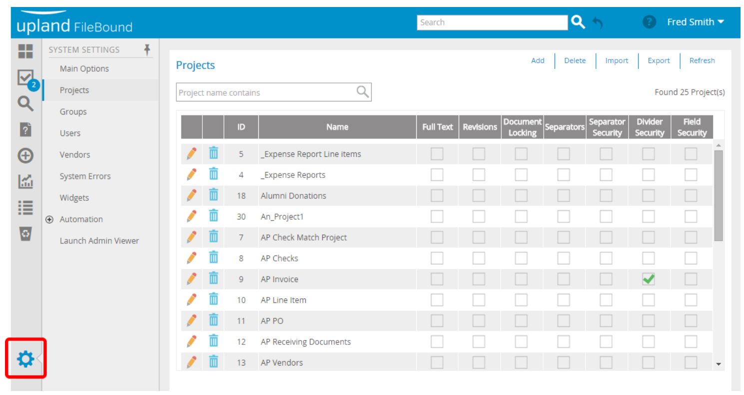
How do I delete a group?

This lesson shows you how to delete a group.

Note: You need to be a System Administrator or an Access Administrator to delete a group.

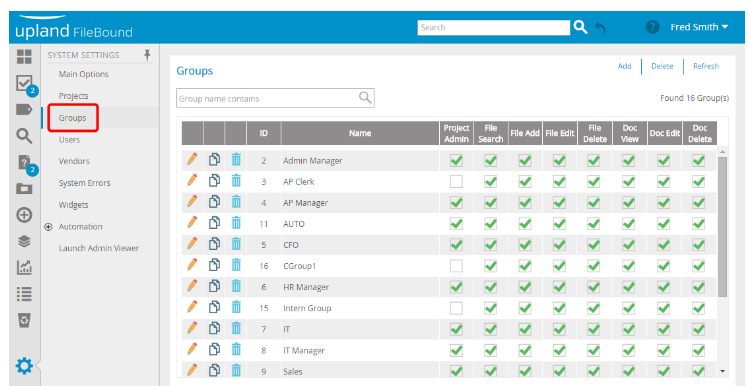
1. Click the Central Administration Button

- Click the Central Administration button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



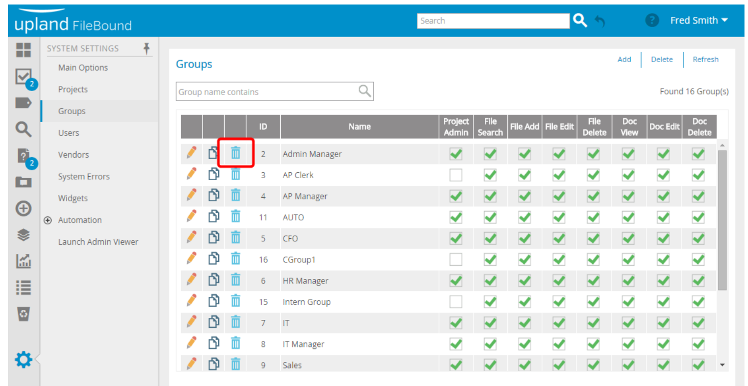
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



3. Delete a Group

- Click the delete icon adjacent to the group you want to delete.
  The selected group is deleted after confirmation.



The users that were members of this group are not deleted but may not longer have access to projects as the group is deleted.

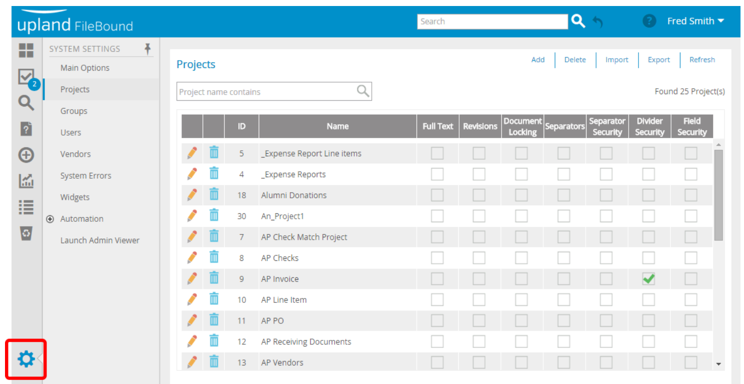
How do I edit a group?

This lesson shows you how to edit a group.

Note: You need to have System Administrator right to edit a group.

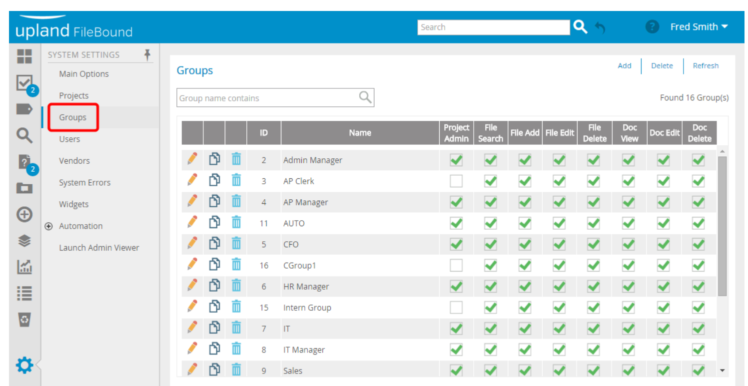
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



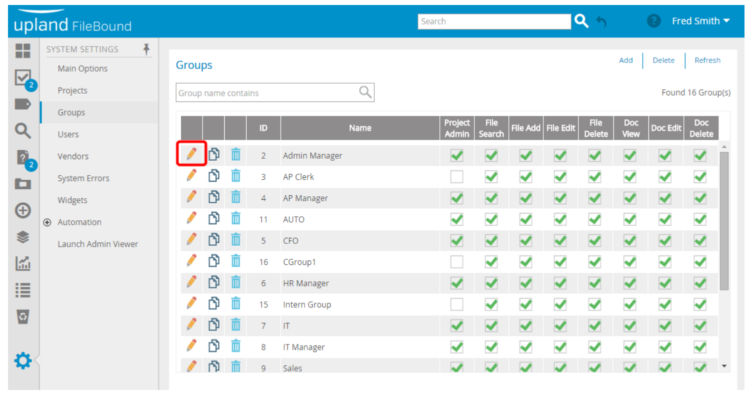
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



3. Open Edit Group Dialog Box

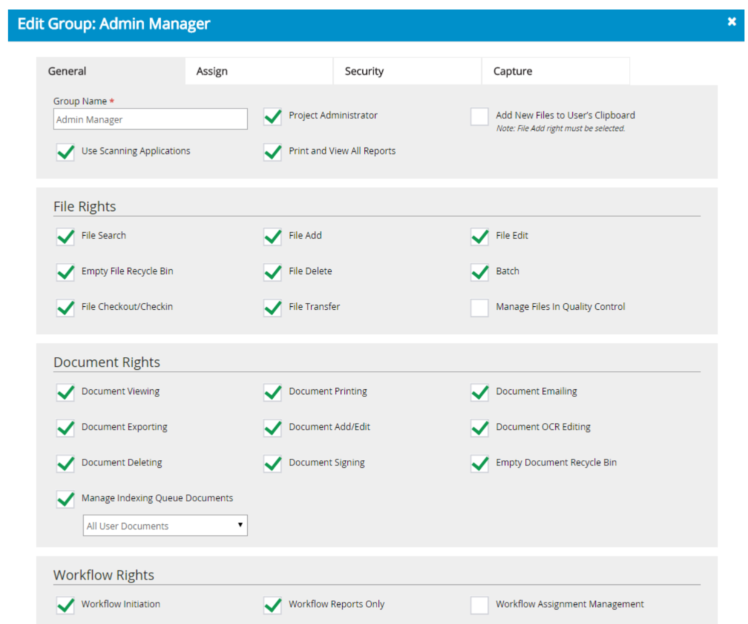
- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



4. Edit a Group

- You can edit the group by clicking the appropriate tabs.

Note: You will need to log off and log on again to see the affect of the changes.

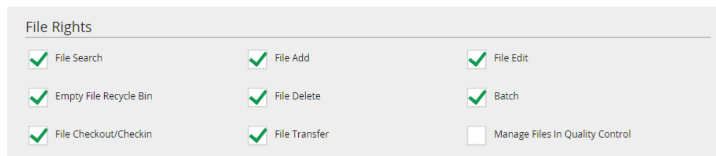


What are the File Rights properties for a group?

The File Rights properties for a group are the file related rights assigned to a group. Based on the rights assigned to the group, users of that group can perform file related tasks like searching for files, adding, editing, deleting, check-in, and check-out files. The System Administrator can set the file related rights for a group from the **General** tab within the **Group** dialog box.

This lesson provides information about the File Rights properties for a group.

File Rights:



File Search: This group right allow users of the group to search for files within the assigned projects. The search icon is available on the WebDocs main page, if the **Search Files** check box is selected.

File Add: This group right allow users of the group to create new files within the assigned projects, including index values.

File Edit: This group right allow users of the group to edit index fields of the files within the assigned projects.

Empty File Recycle Bin: This group right allow users of the group to access the files that only they have deleted in the **Recycle Bin**. Users will be able to restore or delete the file. (Must have File Delete rights to enable this group right.

File Delete: This group right allow users of the group to delete files within the assigned projects.

Batch: This group right allow users of the group to perform batch operations required for physical file tracking. The batch icon is available on the WebDocs main page when the **Batch** check box is selected.

File Checkout/Checkin: This group right allow users of the group to check-out or check-in a file within the assigned projects.

File Transfer: This group right allow users of the group to transfer a file from one user to another user. The transferred file is checked-in for the user receiving the file, and checked-out for the user sending the file automatically by WebDocs.

Mange Files In Quality Control: This group right allow users of the group to manage files in quality control.

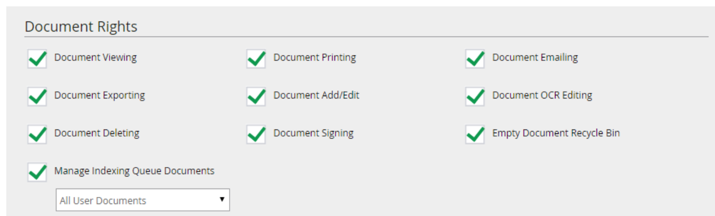
Note: The **Batch**, **File Checkout/Checkin**, and **File Transfer** file rights are used for projects that have physical file tracking enabled.

What are the Document Rights properties for a group?

The Document Rights properties for a group are the document related rights assigned to a group. Based on the rights assigned to the group, users of that group can perform document related tasks like viewing, printing, emailing, exporting, adding, editing, or signing a document. The System Administrator can set the document related rights for a group from the **Document Rights** tab within the **Group** dialog box.

This lesson provides information about the Document Rights properties for a group.

Document Rights:



Document Viewing: This group right allow users of the group to view documents within the **Web Viewer** and the **Windows Viewer**.

Document Printing: This group right allow users of the group to print documents from the **Web Viewer** and the **Windows Viewer**.

Document Emailing: This group right allow users of the group to email documents from the **Web Viewer** and the **Windows Viewer**.

Document Exporting: This group right allow users of the group to export documents from the **Web Viewer** and the **Windows Viewer**.

Document Add/Edit: This group right allow users of the group to add or edit documents within the **Web Viewer** and the **Windows Viewer**.

Document OCR Editing: This group right allow users of the group to edit document OCR information in the **Windows Viewer**.

Empty Document Recycle Bin: This group right allow users of the group to access documents that they have deleted in the **Recycle Bin**. Users will be able to restore or delete the documents.

Document Deleting: This group right allow users of the group to delete documents from the **Web Viewer** and the **Windows Viewer**.

Manage Indexing Queue Documents: This group right allow users of the group to access the **Indexing Queue**.

- **All User Documents:** When selected, all users that have access to the Indexing Queue will be able to see all documents that have been added to the Indexing Queue by any user.
- **Global Indexing user Only Documents:** When selected, users will only see documents that they have added to the Indexing Queue and the documents that have been added to the Indexing Queue by the user that has been designated as the Global Indexing Queue user within the Main Options.

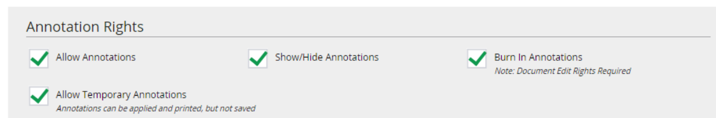
Document Signing: This group right allow users of the group to apply electronic signatures to the displayed documents within the **Web Viewer** and the **Windows Viewer**.

What are the Annotation Rights properties for a group?

The Annotation Rights properties for a group are the annotation related rights assigned to a group. Based on the rights assigned to the group, users of that group can perform annotation related tasks like applying annotations, permanently saving annotations on a document, and showing or hiding annotations. A System or Access Administrator can set the annotation rights for a group from the **Annotation Rights** tab within the **Group** dialog box.

This lesson provides information about the Annotation Rights properties for a group.

Annotations Rights:



Allow Temporary Annotations: This group right allow users of the group to apply annotations to a document, but they are not allowed to save the annotations that are applied to the document.

Allow Annotations: This group right allow users of the group to apply annotations to a document and save them.

Burn In Annotations: This group right allow users of the group to use the the Burn-In option within the Annotation tools, burning in will make the annotation part of the actual document and cannot but undone.

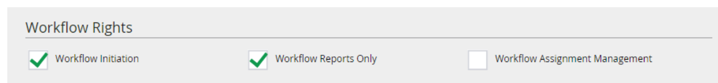
Show/Hide Annotations: This group right allow users of the group to toggle annotations that have been applied to a document on or off.

What are the Workflow Rights properties for a group?

The **Workflow Rights** section provides options to specify grant various workflow related rights to users of the group. You can allow users to initiate a workflow process, limit access to workflow reports only, and access workflow assignments.

This lesson provides information about the **Workflow Rights** properties for a group.

Workflow Rights:



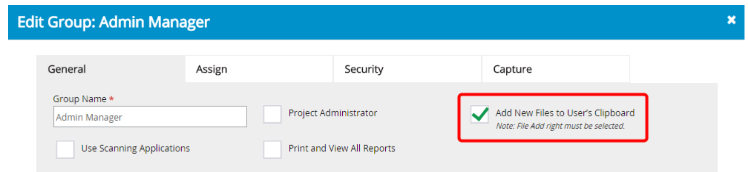
Workflow Initiation: This group right allow users of the group to manually initiate a document into a workflow route or process from within the **Web Viewer** or **Viewer**.

Workflow Reports Only: This group right allow users of the group to run workflow related reports.

Workflow Assignment Management: This group right allow users of the group to have the ability to run a workflow status report that provides the ability to re-assign workflow items to different users.

What is the Add New group right?

This lesson provides information about the **Add New** group right.



The **Add New** group right allow users in the group to add new files to the clipboard automatically, when the files are created.

Note: You must have the **File Add** check box selected from the **File Rights** section in the **Group** dialog box. Files are only added to the clipboard when using the **Add Content** button located on the **Icon** Bar. Files that are added using any of the WebDocs scanning or importing application does not add the file to the user's clipboard.

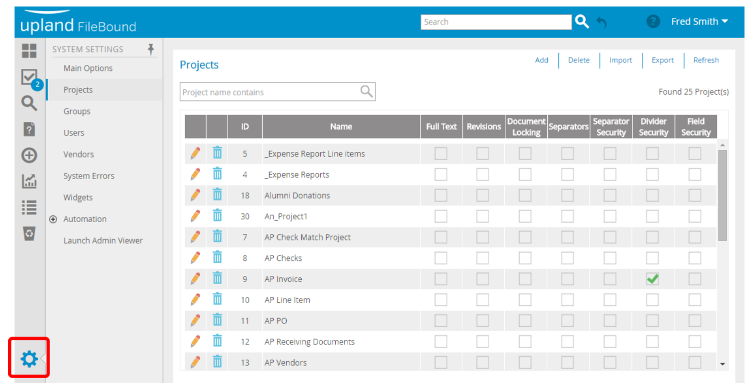
How do I assign project access to a group?

You can assign projects to a group by adding one or more projects to the group. Users assigned to the group can access the projects assigned to the group.

This lesson shows you how to assign projects to a group.

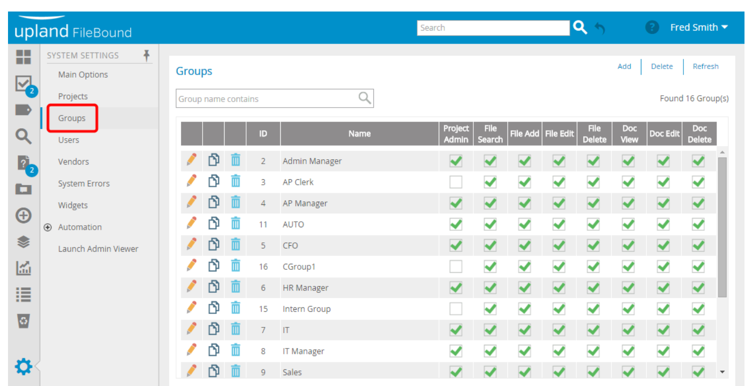
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



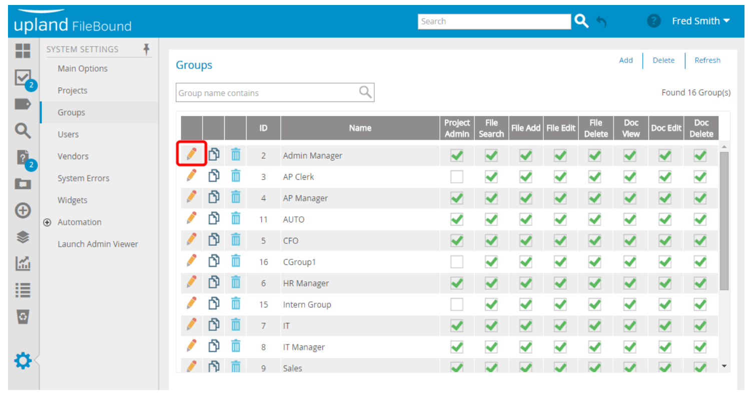
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



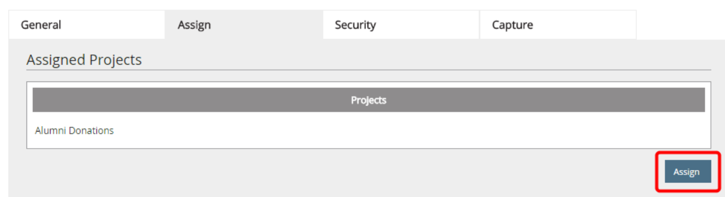
3. Open Edit Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



4. Assign Projects to a Group

1. Click the **Assign** tab.
2. Click the **Assign** within the **Assigned Projects** section.
   The **Assign Projects** dialog box opens.



4.1 Select Projects

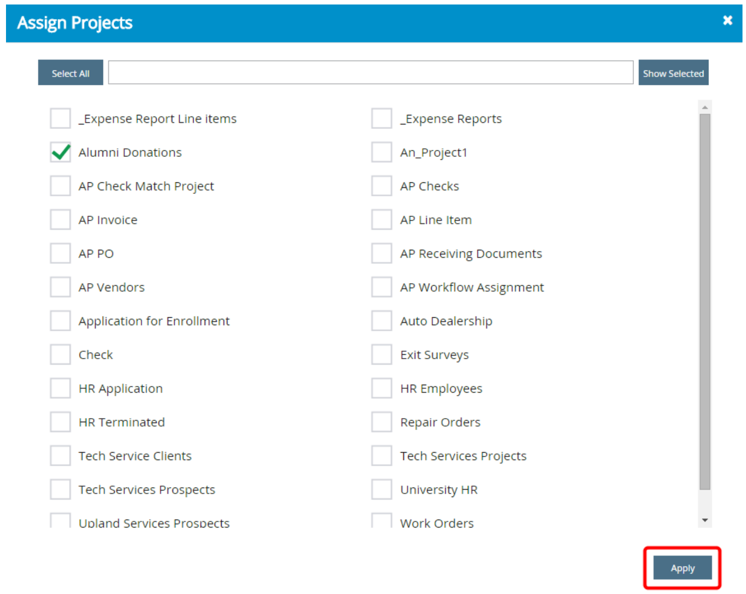
1. Select the check box adjacent to the projects you want to add.

   Or,

   Click **Select All**, to select all the projects displayed within the dialog box.

2. Click **Apply**, to add the selected projects to the group.

3. Click **Save** at the bottom-right corner of the **Edit Group** dialog box.

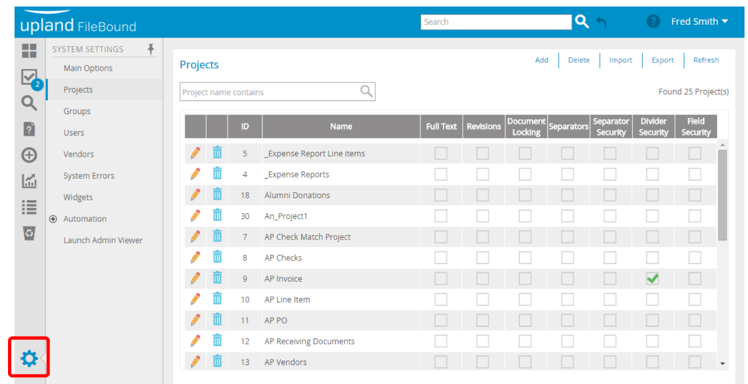


How do I assign users to a group?

This lesson shows you how to assign users to a group.

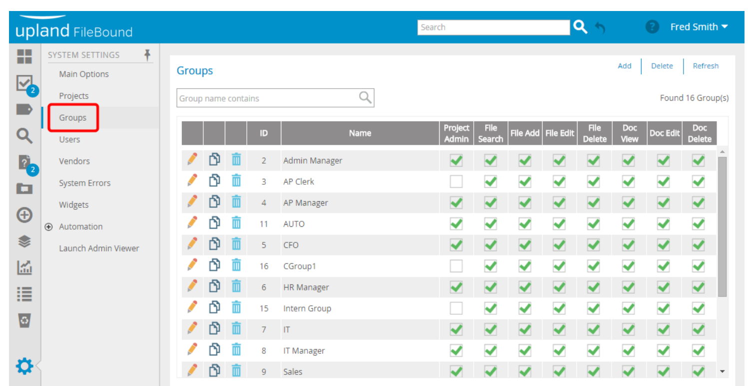
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



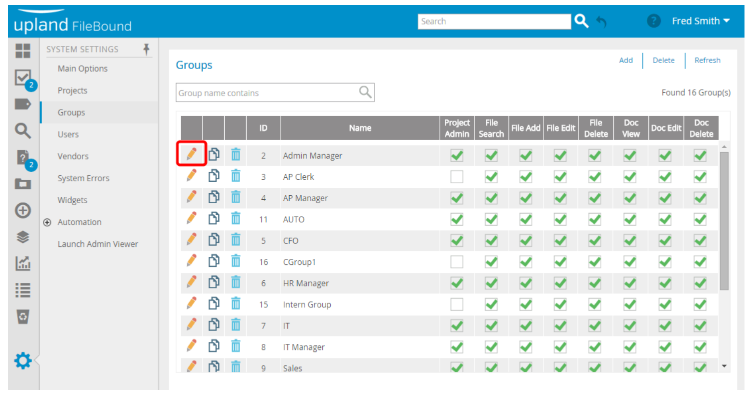
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



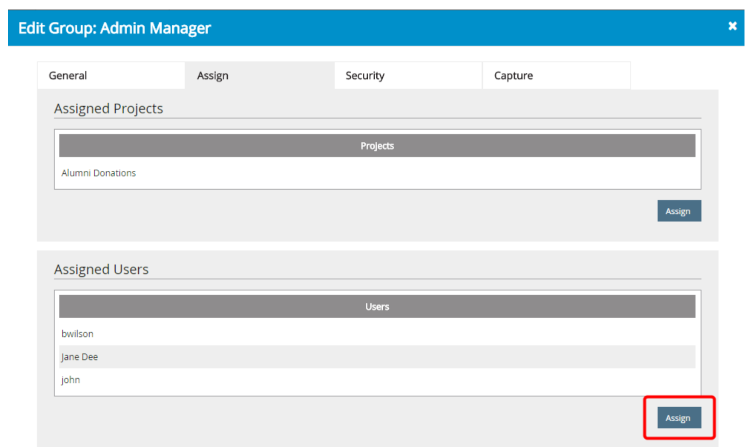
3. Open Edit Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



4. Assign Users to a Group

1. Click the **Assign** tab.
2. Click the **Assign** within the **Assigned Users** section.
   The **Assign Users** dialog box opens.

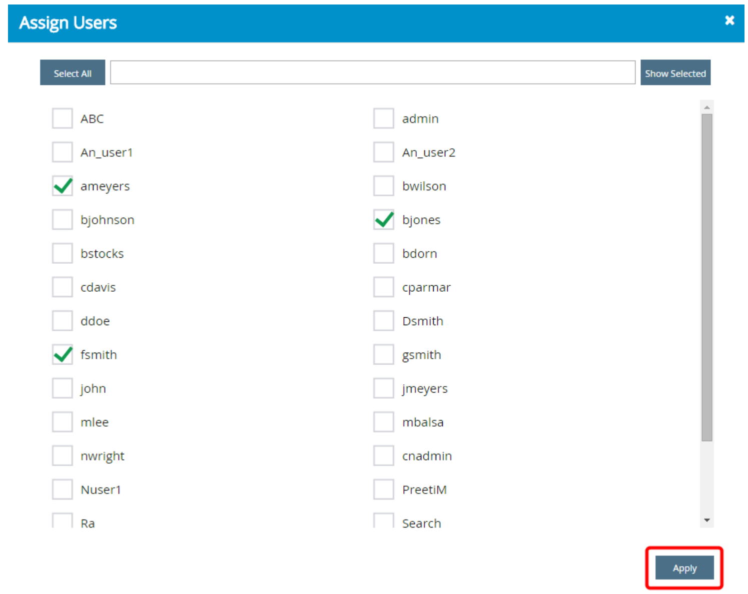


4.1 Select Users

1. Select the check box adjacent to the users you want to add.

   Or,

   Click **Select All**, to select all the users displayed within the dialog box.
2. Click **Apply**, to add the selected users to the group.
3. Click **Save** at the bottom-right corner of the **Edit Group** dialog box.



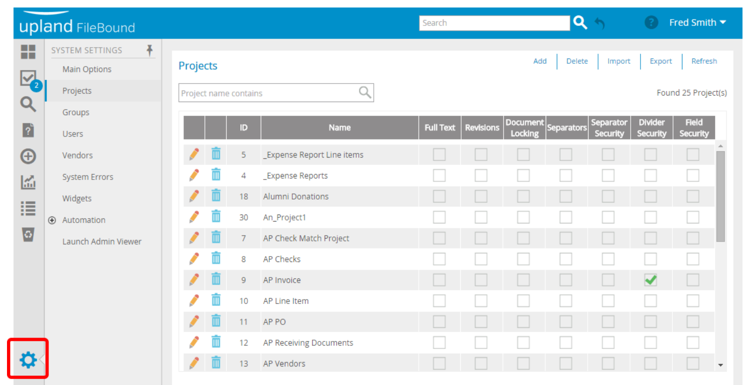
How do I assign access to Separators for a group?

You can enable separator security for a project to restrict access of the users in a group to only selected separators within the project. You can enable separator security in the **Project** dialog box for the selected project.

This lesson shows you how to assign access to separators for a group.

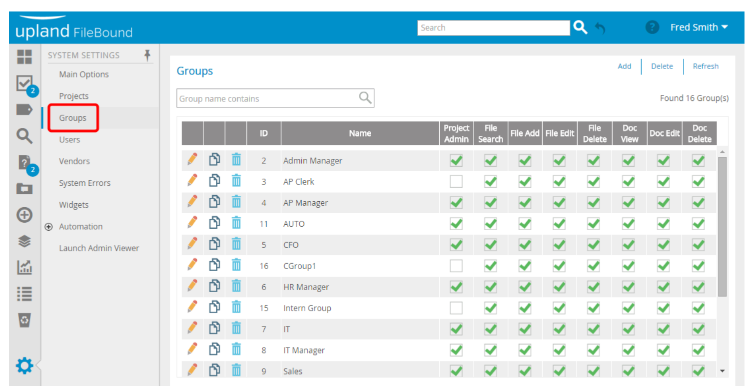
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



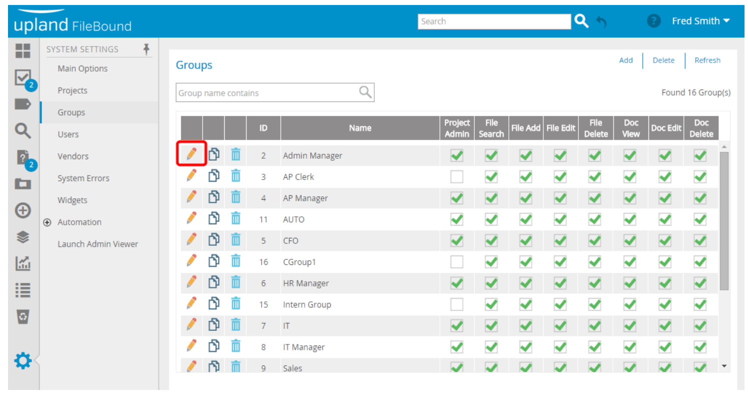
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



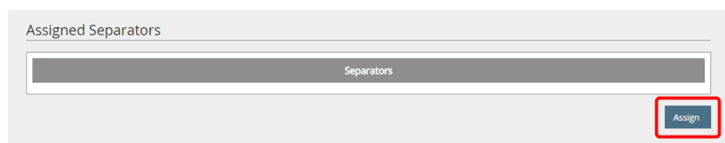
3. Open Edit Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



4. Assign Separators to a Group

1. Click the **Assign** tab.
2. Click the **Assign** within the **Assigned Separators** section.
   The **Assign Separators** dialog box opens and displays separators from the projects assigned to the group. This includes only the projects that have separator security enabled.

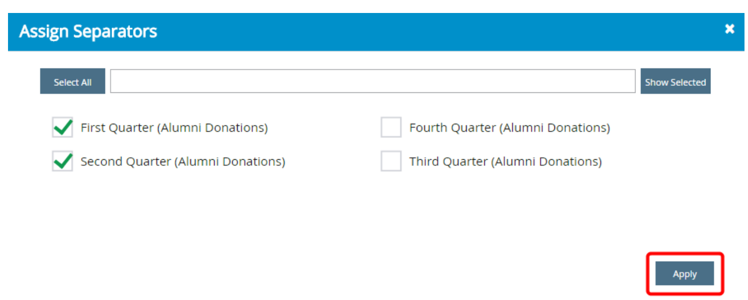


4.1 Select Separators

1. Select the check box adjacent to the separator you want to add.

   Or,

   Click **Select All**, to select all the separators displayed within the dialog box.
2. Click **Apply**, to add the selected separators to the group.
3. Click **Save** at the bottom-right corner of the **Edit Group** dialog box.



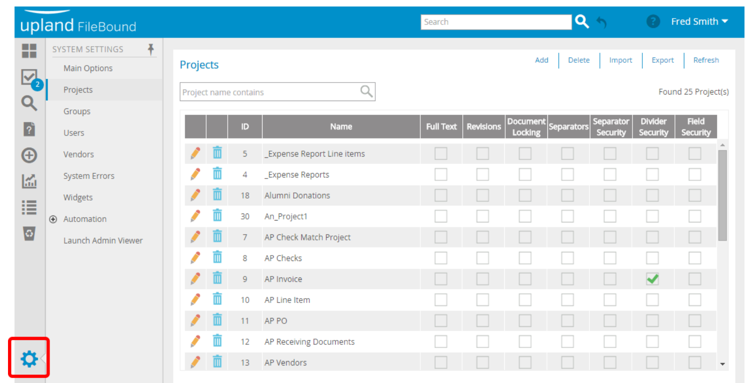
How do I assign access to Dividers for a group?

You can enable divider security for a project to restrict access of the users in a group to only selected dividers within the project. You can enable divider security in the Project dialog box for the selected project.

This lesson shows you how to assign access to dividers for a group.

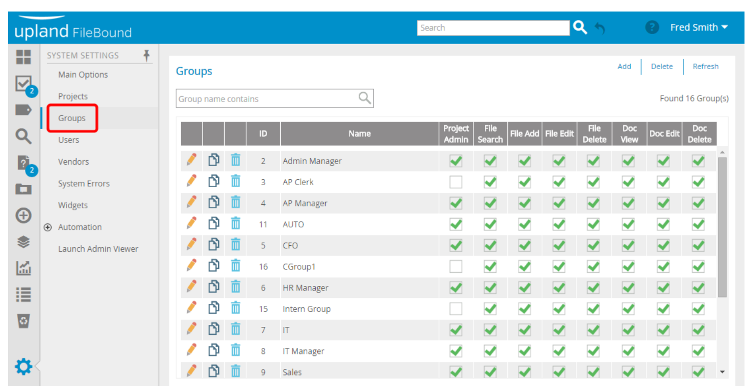
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window.
  The **SYSTEM SETTINGS** menu appears.



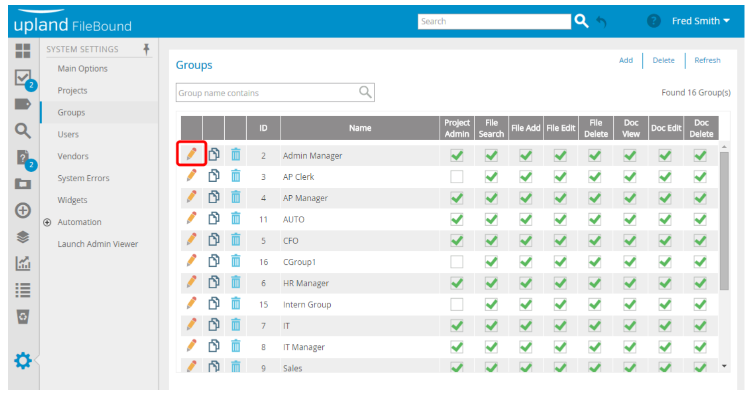
2. Click Groups

- Click the **Groups** icon.
  The right pane displays groups that are available.



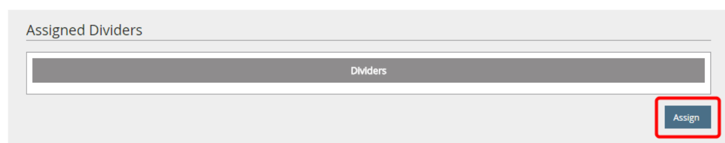
3. Open the Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



4. Assign Dividers to a Group

1. Click the **Assign** tab.
2. Click the **Assign** within the **Assigned Dividers** section.
   The **Assign Dividers** dialog box opens and displays dividers from the projects assigned to the group. This includes only the projects that have divider security enabled.

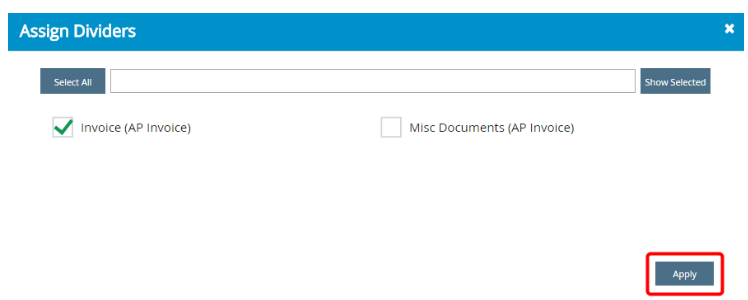


4.1 Select Dividers

1. Select the check box adjacent to the divider you want to add.

   Or,

   Click **Select All**, to select all the dividers displayed within the dialog box.
2. Click **Apply**, to add the selected dividers to the group.
3. Click **Save** at the bottom-right corner of the **Edit Group** dialog box.



What is File Security used for?

This lesson provides information about the use of File Security in WebDocs.

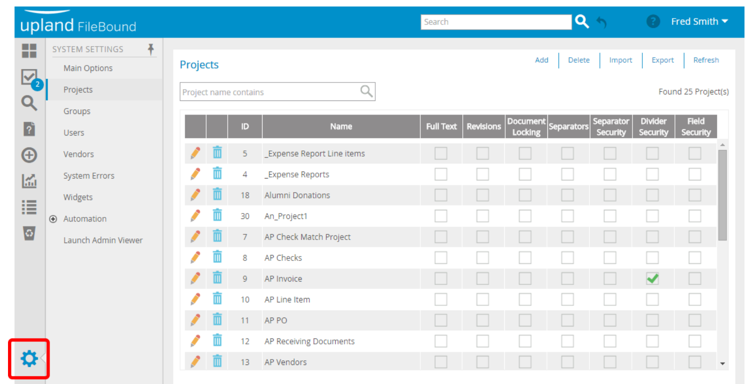
File Security is used for restricting access of users to specific files on the basis of certain index criteria. For example, an Invoices project is using an index file labeled "Department" and a group of users need to be restricted to only see files with a value of "Sales" in the department field for the project.

How do I set File Security for an index field?

This lesson shows you how to set File Security for an index field.

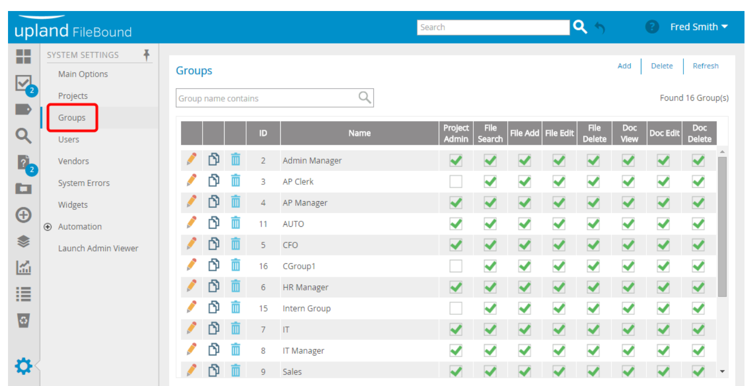
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



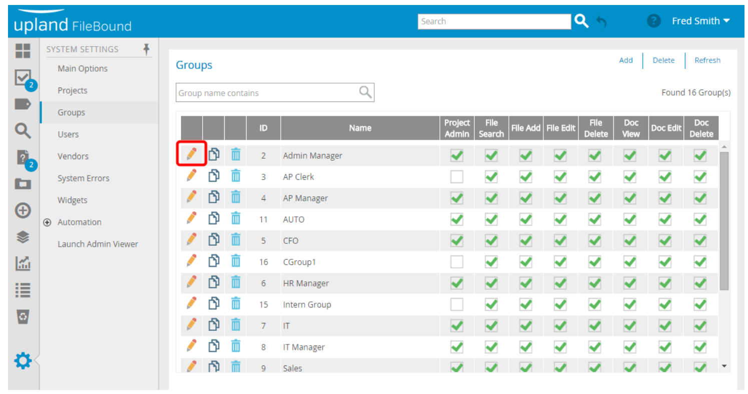
2. Click Groups

- Click the **Groups** icon. The right pane displays groups that are available.



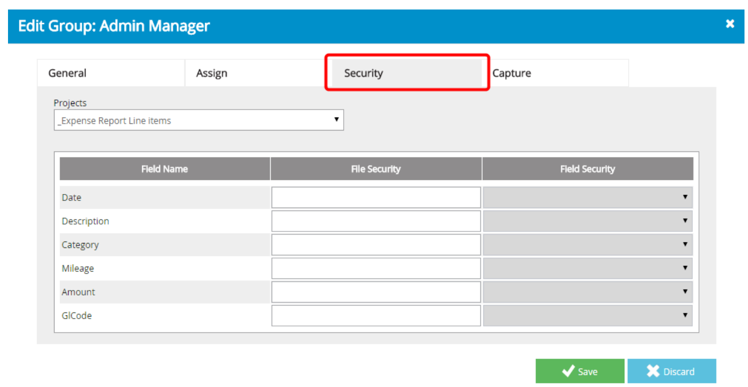
3. Open Edit Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.

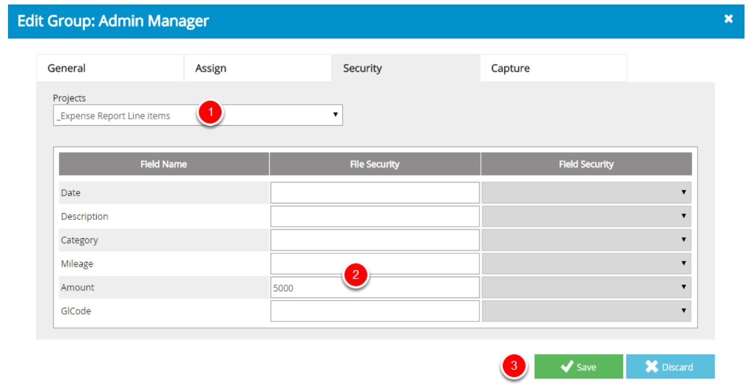


4. Click Security Tab

- Click the **Security** tab.



5. Specify the Value for the Index Field



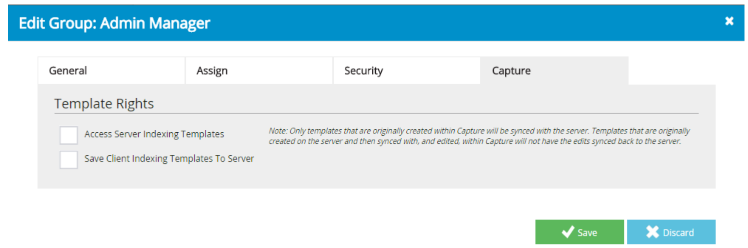
1. Select a project you want to set file security for from the **Projects** list.
2. Specify the value for the selected index field in the **File Security** box.

   Note: Multiple values can be entered by separating them with the pipe (|) symbol. The Exclamation Point (!) can be used at the beginning of the value to allow all values in the index field to be viewed except the designated value. (For example, **!Sales** would prevent the group from viewing anything with the value of "Sales", but can view all files with any other value.)
3. Click **Save** at the bottom-right corner of the **Edit Group** dialog box.

   Note: Similarly, you can restrict users to view only files that contain the user's user name, userid, or user fullname within the designated field. For example, let us take a project that records sales orders, with one of the index fields being the sales person's name. Business policy requires to prevent users to only see sales orders that have their full name within the "Salesperson" index field, rest of the access rights, such as file editing, printing and so on, remains the same. Instead of creating a separate group for each user with their names in the **File Security** field within the group setup, you can create just one group and within the **File Security** field enter **$$USERFULLNAME$$**. New users added to the system will automatically have the file security in place without having to create a new group for each user. You can use **$$USERNAME$$**, **$$USERID$$**, or **$$USERFULLNAME$$** to configure **File Security**.

What are the Capture properties for a group?

This lesson provides information about the Capture properties for a group.



Access Server Indexing Templates: This allows a user that uses Capture to be able to download the Indexing and Document templates that have been created on the server to a PC running Capture. Any edits to the templates that is done on the local Capture installation will not be synced to the server.

Save Client Indexing Templates To Server: If a template is created from scratch on a local PC running Capture this will allow those templates to be synced and added to the server for distribution to other Capture installations.

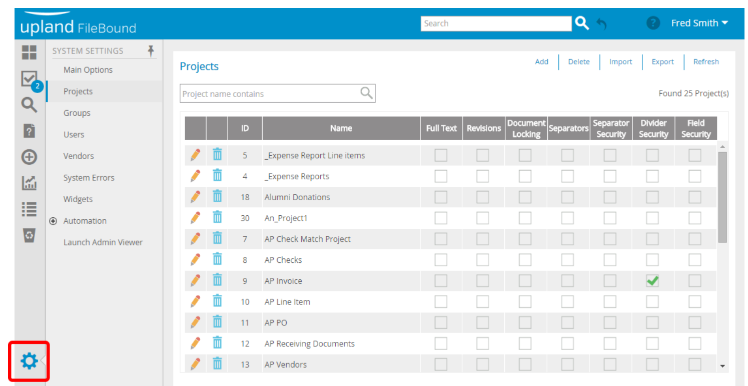
Note: The Capture program will also need to have the **Synchronize Indexing Templates with Server** option enabled for this to function properly.

How do I allow Capture users to access indexing template on WebDocs server?

You can allow the users in the group that use **Capture** to retrieve **Indexing Templates** from the WebDocs server and save them to the local **Capture** workstation. This lesson shows you how to allow **Capture** users to access indexing template on WebDocs server.

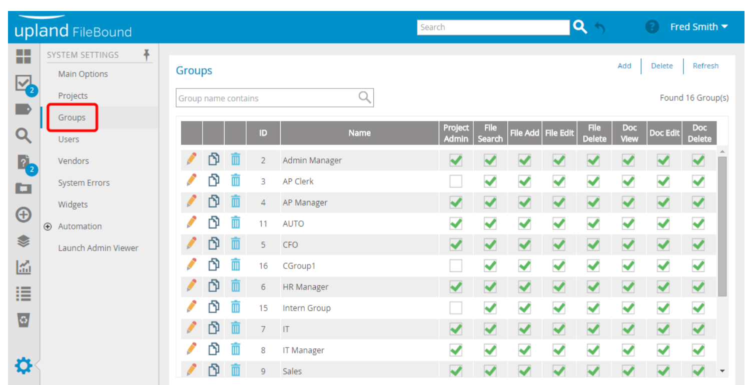
1. Click the Central Administration Button

- Click the **Central Administration** button at the bottom-left corner of the WebDocs window. The **SYSTEM SETTINGS** menu appears.



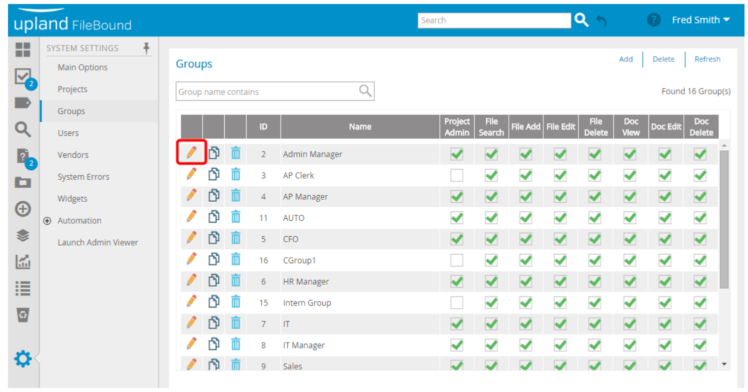
2. Click Groups

- Click the **Groups** icon. The right pane displays groups that are available.



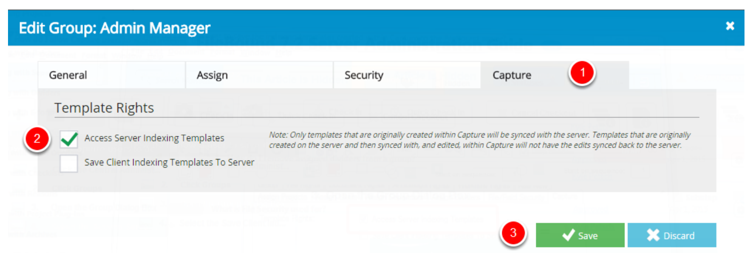
3. Open Edit Group Dialog Box

- Click the edit icon adjacent to the group you want to edit.
  The **Edit Group** dialog box opens.



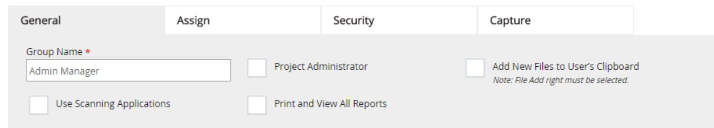
4. Select the Access Server Indexing Templates Check Box

1. Click the **Capture** tab.
2. Select the **Access Server Indexing Templates** check box.
3. Click **Save** at the bottom-right corner of the dialog box.



What are the Group General properties?

The lesson below describes the different general properties for a group.



Group Name: This is the name that is given to the group.

Project Administration: This allow members of the group to become Project Administrators of all the projects that this group is assigned to.

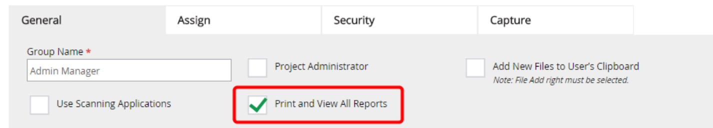
Print and View All Reports: This allow members of the group to print and view all reports for the projects that this group is assigned to. For more information about the reports, click here.

Use Scanning Applications: This allow members of the group to log into and use WebDocs Capture.

Add New Files to User's Clipboard: This allow members of the group to add newly created files through the **Add Content** option to be added to their clipboard.

What reports does Print and View All Reports give access to?

A group can be granted the the "Print and View All Reports" right. The following are the reports that this right gives access to.



Audit Reports:

- File Activity Report
- Document Activity Report
- Deletion Report
- File Analysis Report
- User Rights Report
- Document Signature Report
- Locked Document Report
- Activity Audit Log

File Tracking Reports

- File Checkout Report
- Pending Requests Report

System Reports

- User Login Report
- System Usage Report
- Automation Events Report

Workflow Reports

- Workflow Status Report
- Checklist Report
- Queued Items Report
- Queued Productivity Report

Testing the Setup

How do I test the Setup?

After setting the required configuration for group and users, you can test the setup by logging on to WebDocs using the credentials of different users created earlier. you can verify that the users have appropriate rights to perform the operations that they need to perform.

How do I log on?

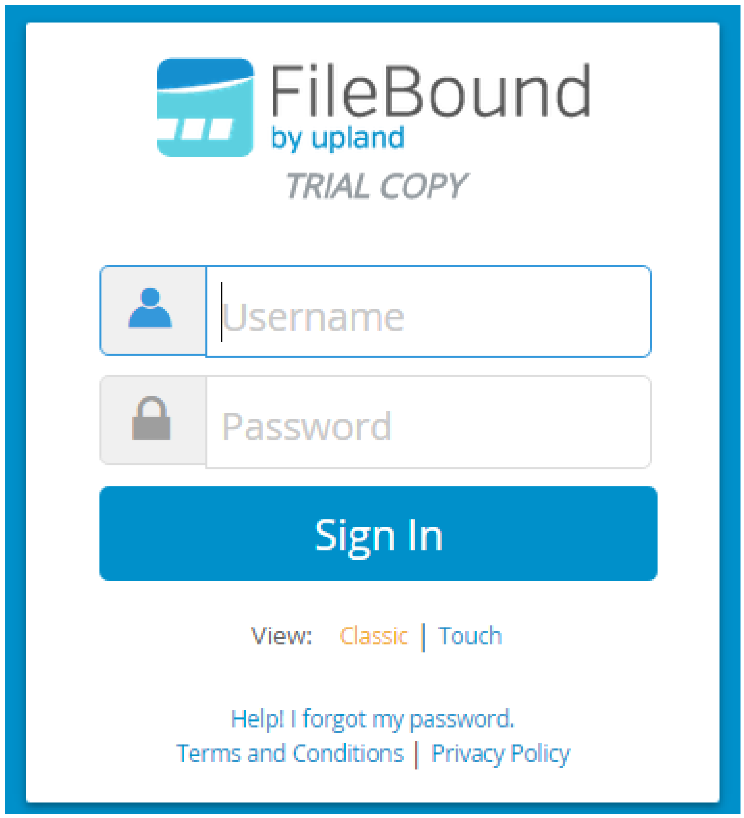
When you start the WebDocs application by accessing the WebDocs URL, you will see the logon screen.

Note: If you want to log on to WebDocs using a mobile or a tablet device, you can use **Touch**.

This lesson shows you how to log on to a WebDocs system.

Log on to WebDocs

1. Type the user name in the **User Name** box.
2. Type the password in the **Password** box.
3. Click **Sign In**.
4. Click **Help I forgot my password** to send an one-time logon password through email, on the configured email address.
   Note: You will see the **Help I forgot my password** link, if it is enabled by the System Administrator.
5. You can log on to WebDocs using the one-time logon password and reset your password. **Note**: You can click the **Terms and Conditions** link, to read the legal implications of using WebDocs.



The startup page opens on successful logon. Depending on the settings, one of the pages will open as the startup page:

- **Workspace**
- **Assignments**
- **Search**
- **Last Search**
- **Add Content**
- **Plug-ins**
- **Custom URL**
- **Indexing Queue**

Note: You can choose a screen to open at start up, using the **Preferences** option from the user menu.

WebDocs understands from the combination of user name and password, whether you are a System Administrator, a Project Administrator, or a general user.

If the user name or password you have typed is incorrect, a message appears. Type the correct user name and password, and log on again. If you have forgotten the password, then use the **Forgot Password** link.

Note: As a System Administrator, you can view 'Failed Login' and 'User Login' reports using the **Reports** menu option on the left navigation pane.

How do I make an entry for a file?

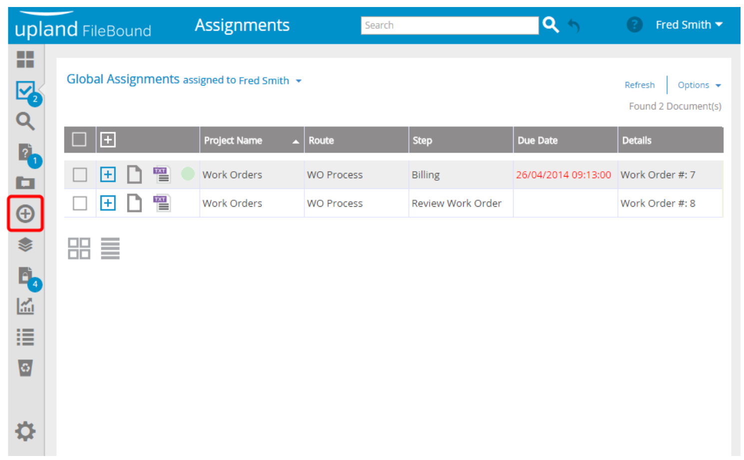
The **File Entry** page allows you to create a new file in any project. You must have appropriate rights to create new files for the project. You can access the **File Entry** page using more than one methods.

Note: If the **Start Screen** is set to the **File Entry** page from the **User Preference** configuration, then the **File Entry** page opens when you logon to WebDocs.

This lesson shows you how to make an entry for a file.

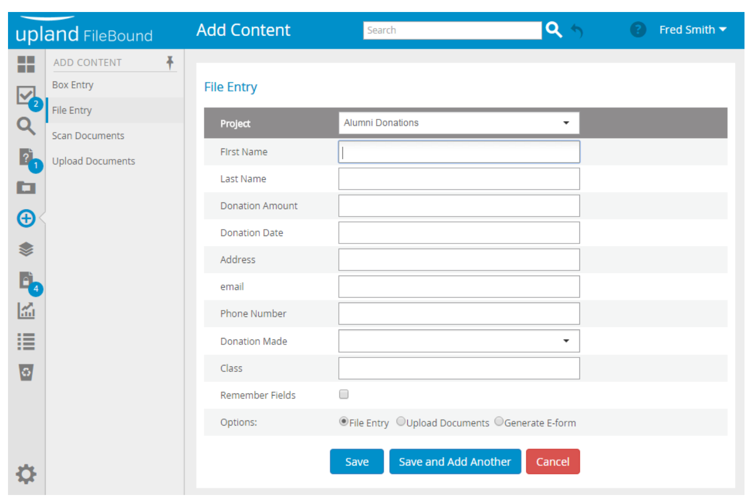
1. Open the File Entry Page

1. Click the add content icon on the navigation pane.
   The **ADD CONTENT** menu appears.
2. Click **File Entry**.
   The **File Entry** page appears.



2. Specify Details

1. Select a project from the **Project** list.
   The index fields for the project are displayed.
2. Specify values for the index fields.
3. You can select the **Remember Fields** check box, to make the system to remember values for the next entry.
   Note: This feature works when you click **Save and Add Another**.
4. Select an option for **Options**.
   Following options are available:
   - **File Entry**: This option creates a new file without any document in it.



- **Upload Documents**: This option displays document upload options.
- **Generate E-form**: This option generates an e-form with the values specified for the index fields.

5. Click **Save**.

   Or,

   Click **Save and Add Another**, to save the box entry and add another entry.

2.1 Upload Documents

The **Other Options** section is displayed if you have selected **Upload Documents** option.

1. You can select a divider you want to place the uploaded document in from the **Divider** list.
2. You can drag and drop documents within the drop documents section, to upload the documents.

   Or,

   You can click the **Browse** icon, to open the **Open** dialog box.
   Select the documents you want to upload, and then click **Open**.