DocuPhase
User Interface (UI)
Appendices

Version 6.1

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Introduction

The DocuPhase UI Appendices

DocuPhase is a comprehensive browser-based platform for Document Management and Process Automation. As a platform, DocuPhase includes Document Management, Web Forms, Process Design, Workflow Automation, Analytics, and Management tools that seamlessly integrate into your existing business applications and programs. DocuPhase is your foundation for transforming and automating your business processes.

The Appendices in this manual provide supplemental reference information related to the DocuPhase Platform including a description of the DocuPhase *Heavyweight Viewer* in *Appendix E* which is available as an optional viewer under the Microsoft IE browser in this DocuPhase release until it is sunset in the future as it is fully replaced now by the new HTML5 Lightweight Viewer.

The DocuPhase Platform consists of four (4) Core functional areas which, when combined, provide a flexible, efficient and scalable means to address the Enterprise Process Workflow Automation, Web Forms, Capture Recognition and Document Management business needs of organizations of virtually any size and line-of-business.

DOCUMENT MANAGEMENT CORE
- Secure central document repository
- Powerful integration capabilities (iLink)
- Version control & full annotations
- Basic Analytics
- Full text search
- On-the-go mobile capture

WEB FORMS CORE
- Full integrated smart web forms
- Global form design with business rules
- Seamless integration with core applications
- Live responsive forms
- Wet signature
- Automated PDF creation

PROCESS WORKFLOW AUTOMATION CORE
- Powerful process workflow designer
- Native integration without scripting
- Workflow management dashboard
- Dynamic resource allocation
- Automated email notifications
- Advanced work queue search

CAPTURE RECOGNITION CORE
- Advanced data capture & auto extraction
- Seamless data capture from Microsoft Suite
- Template and non-template OCR
- On-the-go mobile capture
- Automated indexing
- Barcode indexing

ENTERPRISE PROCESS WORKFLOW AUTOMATION
Enable all users to engage in complete process automation throughout the company by combining the power of these DOCUPHASE Cores: Document Management, Process Workflow Automation and Web Forms.

The following Appendices are available for your convenient reference as a separate complementary manual to the ***DocuPhase Advanced User Manual***.

Purpose and Assumptions

This Appendix reference material is provided as a supplement to the *DocuPhase User Interface (UI) Advanced User Manual* which provides information to:

- **Administrator Users** to prepare them to install, configure, maintain users/groups, permissions, use and test the DocuPhase Platform installed solutions.
- **Designer Users** to prepare them to define applications and configure features needed for the data management operations and workflow as well as integrated features such as iForms, Analytics, mCapture, ScanDox and iRetention.
- **End-Users** to prepare them to use the DocuPhase browser-based UI to search, index and process documents in DocuPhase as well as utilize Forms, Analytics and manage their preferences.
- **Supervisors/Managers** to prepare them to use the DocuPhase UI as end-users as well as to provide oversight and management of content and business processes within their authorized scope as well as access to content, reporting, advanced analytics; plus monitoring and control over the work being performed by individuals under their authority.

The Appendices are included and available for your convenient reference as a separate complementary manual to the **DocuPhase Advanced User Manual**.

Typically, most reader's use of this material will be done via the integrated *DocuPhase Online Help S*ystem, available from components within the DocuPhase Platform, where they can find the information they need – at the moment it is needed – via its Contents, Index and Search as well as its Context-Sensitive Help features as well as its PDF download capabilities for individual documents.

Client Support Services Contact Information

DocuPhase is committed to providing quality service and support for our customers. If you are experiencing difficulty with your DocuPhase software, please let us hear from you so we can help.

Client Support Services are provided as part of your Maintenance Program. Enhanced support programs are available upon request.

The standard support feature set includes:

- Product Updates and Upgrades.
- Telephone and Email support during local business hours.
- Remote Connect Support during local business hours.

You may:

- Contact us by email at support@DocuPhase.com
- Reach us by phone at (727) 441-8228
- Reach us by fax at (727) 444-4419
- Find us online at www.DocuPhase.com/support.

Foundational Terminology

The purpose of this section is to provide basic reference terminology as a foundation for the concepts and terminology related to the DocuPhase Platform.

Term	Description
Active Directory	Active Directory (AD) is a centralized and standardized system that automates network management of user data, security and distributed resources and enables interoperation with other directories.
Active Directory Integrated Services (ADIS)	ADIS is an DocuPhase feature where one login step will serve to identify a user to other components of their suite of related products. For example, logging into DocuPhase will enable a user to also access ScanDox and other related products without a separate login step. In addition, DocuPhase is able to utilize the Active Directory (AD) information to improve the DocuPhase Administration and User experiences.
Analysis	A DocuPhase-Analytics Analysis rendering basically consists of one or more Analytics Objects presented in the Analytics Work Area. All Objects in an Analysis are connected, allowing one Object to be used to specify or influence data shown in the other Objects. *For example by using Drill-Down or applying a Filter criteria to one of the Objects in an analysis, the other "connected" object displays are influenced to remain in synchronization based on the established Drill-Down or Filter criteria.*
Analytics Notification	This is similar to a DocuPhase iAlert or Progression Notification where email messages are sent upon encountering a matching event condition. In the case of Analytics, the matching event is determined when an analysis is performed that returns results which match a pre-defined BI event-condition.
Analytics Object	Analytics Objects are basically windows within the Analytics Work Area that display data. An Object can show data in many ways, for instance as a pie chart or a table. Within each Object window, it is possible to influence which data is displayed and how it is displayed. Objects can be used on their own, but typically for composing Analyses consisting of multiple related Objects.

Analytics Report	An Analytics Report is a report generated in printable format by the Analytics Server from built-in or interfaced Data Sources – This reporting functionality can produce paper, PDF and other output formats and it is also called '*Analytics Reports'*. *Note: Other types of Reports can be generated by DocuPhase and other external report writers outside of the Analytics capabilities.*
Application	The term *Application* has several meanings depending on the context, so when the appropriate context is not obvious, <u>the name of the context is used to qualify the term such as:</u> DocuPhase Application, iForms Application, Google Application, Software Application, etc. ▪ <u>In DocuPhase</u>, a ***DocuPhase Application*** is the digital equivalent of a filing cabinet. Each application will utilize a common set of index fields that are used to describe and locate the documents and media files that are stored in that application (i.e., electronic filing cabinet). **Note:** *A DocuPhase Application is a virtual and digital filing cabinet where specified types of documents are indexed and stored:* ▪ *Progression* links to DocuPhase Application cabinets when building its workflow Document Definitions so that the Progression-level workflow document and its corresponding DocuPhase-level documents operate as one extended definition. ▪ A *Google Application* is a Google Application Account that provides Google services after you log in. ▪ A *Software Application* is an LOB-specific or generic software program or suite of programs that may be integrated with DocuPhase and iForms using the DocuPhase iLink module.
Binder	A Binder is a collection of documents, such as a virtual folder, that contain one or more DocuPhase Documents by using links to reference them while the documents are still protected within DocuPhase and can be shared. Binder objects also provide information to the iDox Service and the Progression Engine regarding what files to process, where they are located and where to move them once they are processed. Key fields that hold the same type of index information on documents in a binder are the means for associating and binding the documents together as a binder object. A binder object can then serve as a work item allowing one or more documents to be moved and processed at the same time through a workflow for a business process.

	For example, in the Human Resource Application, the Binder may hold all the documents related to a process (i.e. the I-9, W2, Employment Application, Employee Resume and Interviewer Notes) for the same employee.
	Note: Sub-Binders are an embedded binder within a binder (i.e., recursive nesting is possible, since this can be done at more than one nested level).
Bit	A BIT is a binary digit taking a value of either 0 or 1. The abbreviation kb refers to 1024 bits (e.g., 1 kb – 1024 bits vs. 1KB – 1024 Bytes of 8-bits each).
Business Process	In general, a business process is a sequence of related activities or tasks that produce a specific business result or product that is expected to meet or comply with defined requirements.
Business Process Automation (BPA)	Business Process Automation is the process of integrating software applications to supplement and/or substitute manual processes to manage the information flow within an organization to lower costs, reduce risks and increase operational efficiencies.
	For example, using Progression will allow you to apply automation and consistency to a business process to further reduce costs and drive efficiency.
	The Progression Engine in conjunction with the DocuPhase Workflow tab in its browser UI drive the operational BPA (i.e., the Business Process Execution (BPE)).
Business Process Design (BPD)	In Progression, a business is considered to have many Processes that can each be further decomposed into: Tasks, Steps, Decision Points, and Actions related to a workflow work-item being processed.
	Using Progression Designer, a graphical representation of these components and how they are connected is used to create and maintain business process workflow designs.
Business Process Improvement (BPI)	Business Process Improvement is a systematic approach to improving an organization's business processes.
	Business Process Improvement consists of defining the organization's: who, what and why, the organizations customers and the how the process can be done more efficiently.

	For example, by defining who you are, what you do and why you do it, the organization's strategic goals, purposes and objectives are realigned; by defining who you serve, the organization and the customers are realigned. The realigning exercise fosters a radical change in an organizations behavior, rather than small incremental changes overall. However once major business process improvements have been accomplished, BPI can continue to provide further incremental refinements and improvements.
Business Process Management (BPM)	An automated BPM system is designed to manage an organization's information content in multiple media formats as well as provide automated and manual support to an organizations business processes and employees. DocuPhase and Progression are components that provide BPM and BPA automation with a robust Analytics BI capability integrated for presenting real-time status and reporting on an organization's content and business operations. The same Business Process graphical representation used to design the system can also be utilized by managers and supervisors, with appropriate permissions, to view workflow progress and status of process-transactions as well as re-allocate resources as needed in real-time for the resulting operational processes.
Business Process Re-Engineering (BPR)	Business Process Re-Engineering is a re-design process to bring fresh perspectives on improving the business process; including reexamining the company's goals and improving critical areas with performance measures such as cost, quality, service and speed. *For example, a company might discover that the Human Resource department vacation request process is currently costing the company $X because first the employee must print out the request, walk it over to the manager for approval and then walk it over to the payroll department.* *Each of these steps are a cost to company; however, if the process was automated by electronically submitting the document to the appropriate manager, the time that is spent walking & talking is eliminated and the processes is now streamlined and measurable.* *Note: BPR is an older term that is essentially replaced by BPI and BPM terms and concepts.*

Business Process Workflow Execution (BPE)	A BPE is a workflow engine that is able to execute the design and configuration for an organizations business workflow processes – In other words, the Workflow Engine that controls the distribution and flow of work. The Progression Workflow Engine working in conjunction with DocuPhase drives the automated support for business processes assisting staff in the processing and routing of work for applicable tasks at the appropriate time until each business process-transaction is completed. The same Business Process graphical representation used to design the system can also be utilized by managers and supervisors, with appropriate permissions, to view workflow progress and status of process-transactions as well as re-allocate resources as needed in real-time.
Byte	A Byte is an information storage measurement unit, usually considered to contain eight bits of data plus parity bits. The abbreviation KB refers to 1024 bytes; MB to 1000 KB; and GB to 1000 MB.
Capture	Paper document capture is done by a scanning or fax device that produces images of the document's pages in digital form (e.g., TIFF or PDF format typically for documents) to be stored in designated Application Cabinets in the DocuPhase Repository. Digital images, documents and files are also captured by importing or copying (e.g., drag-and-drop using ScanDox) them into the DocuPhase Repository as well as mobile capture using the mCapture App on Apple iPad, iPhone or Android.
Check-in	Is the act of adding a new document revision to the repository. Performing a check-in will add the changed document to the repository and unlock it so that other users will be able to see the changes and make further changes to the document (i.e., Checkout the document). For example, after a document has been checked out for review and editing, it must be checked in. The documents are numbered according to the revision number. Additionally depending on the account functionality permissions that are granted, the user may have added document management capabilities. *Note: The Revision Control option must be activated and permissions granted in order to use Checkout and Check-In features.*

Checkout	Checking out an item is the act of locking a document in the repository for editing purposes. Checking a document out locks it and prevents other users from editing the document at the same time. This prevents the loss of work since one user must wait until a document is available for checkout before they are allowed to edit the document and save their changes.
	For example, if there are two members of an Accounting department working on the same invoice, if one of the users has checked out the document to complete some type of work, the other user will be unable to checkout the same document until its lock has been released (e.g., when it is released by check-in or by an administrator).
	Note: The Revision Control option must be activated and permissions granted in order to use Checkout and Check-In features.
Client	In the context of this document, when a Client is used, it is a reference to the Client/Server Relationship in which the client is the computer that receives data from a Server that is providing it with the information.
Concurrent Users	Concurrent Users are multiple users working with the same licensed software product at the same time (i.e., in parallel, concurrently).
	A software licensing agreement may stipulate limits or pricing rates based upon the number of concurrent users.
	Max Concurrent Users is the operational limit setting for the maximum number of concurrent users under the current license. This limit can be easily changed by the DocuPhase License Administrator once a new license agreement is reached.
Cross Tabs	Cross Tab or Cross Tabs are synonyms for the term 'Cross Tabulation'.
Cross Tabulation	A Cross tabulation (also called a Cross Tab) is a non-graphical tabular structure that presents Measure data-element detail and/or summary information organized within Dimension data-elements which can represent a hierarchical arrangement of data.
	They are heavily used to present actual data values for BI analysis, business, engineering and scientific research. Cross Tabs provide an effective way to understand the data as detail and summary information values that lie behind the many different graphical renderings that Analytics can produce from each Cross Tab.

	Because of the value provided by the ability to look at a graphic as well as 'under the hood' at the underlying data, Analytics provides a feature that allows a user to dynamically toggle between its graphical rendering and its cross-tab rendering as well as the ability to 'Drill Down' through a hierarchy of multiple dimensions displaying the resulting graphical or tabular renderings.
Cross-Query Search	A Cross-Query Search is launched when a DocuPhase user clicks on a displayed value for an index field on its Search Result page. This value is used to search across multiple DocuPhase Application filing cabinets that contain the same Index Field Name and displays all matching records with this value grouped by their Application Cabinet name. Cross-Query Search is also known as Dynamic Linking.
Cube	A Cube is a multi-dimensional organization of data as Dimensions and Measures in an OLAP database, such as a Data Warehouse, for optimized analytical performance as a Data Source or data feed for Analytics processing. *Note: By suitably interfacing SQL databases to supply data as if they were actual Cubes, the Analytics users can easily work with all Data Source Cubes without concern as to their actual origin details in the same way.*
Customer	In the context of this document, when the term 'Customer' is used, it is a reference to the end-user or company utilizing the DocuPhase Platform.
Dashboard	An Analytics analysis that contains charts, gauges as well as possibly other Analytics Objects that provide their users with a high-level view of the results of business operations to expose issues plus promote timely corrective Executive and Management decision-making and action.
Data Warehouse	A Data Warehouse is defined as a collection of data in support of the management decision making processes. A Data Warehouse solution can ensure the availability of consistent and cleansed information that can hold both detailed and aggregated (i.e., summarized) data at designated levels to facilitate analysis, planning and to make everyday decisions for the smooth functioning of an enterprise.

Database	A database is a structured collection of tables of heterogeneous information organized in such a way that a computer program can quickly select desired pieces of data.
	The DocuPhase and customer databases that are used by the DocuPhase Platform support modern SQL and ODBC technologies.
	Note: For the purpose of this document, you can think of a database as an electronic filing system for data provided by DocuPhase's database as well as structured information stored and managed for use by customer and third-party applications.
Deployment	Deployment is the installation of software products such as the DocuPhase Platform and its optional software components on your server(s) and/or workstations.
Dimension	A Dimension is a data element that holds values of a specified data type which are used to group and sort the organizational structure for one or more Measures and their values in an Analytics Object that is part of an Analytics Analysis, Dashboard or Report.
	In other words, Dimensions tell something about measures – like who, what, when and where the measures apply. Often, Dimensions are not quantitative (e.g., numerical) since they may contain the name of a person, company or identifier that may be suitable for grouping, but not computation. In other cases, Dimensions may be chosen to be both Dimensions as well as Measures.
	An Analytics Analysis or Report can present multiple Dimension groupings and multiple Measures as summary or detail values.
Document	A Document captured, stored and protected within DocuPhase can be any electronic file. In addition to text, Document items often contain graphics, charts and other information elements.
	For example, a Document can be a Word document, PDF file, Excel spreadsheet, any audio file or a TIFF image file (e.g., single page or multipage images).
	Documents in DocuPhase are manipulated and processed by users of the DocuPhase UI as well as users of Progression-based workflow.
	Note: At times in Progression or iDox, the term 'Document' may be used instead of "Document Definition". Since Document Definitions contain additional Progression-level properties as well as a link to a related DocuPhase Document. Operations on a Progression-level Document Definition object are also indirect operations on its corresponding stored DocuPhase Document item.

	For example, a stored DocuPhase Document can be an audio file (i.e. a piece of played music, a meeting transcription or any form of recorded sound), a photo or video file (i.e. a piece of artwork that has been scanned or fully created electronically), a visual file (i.e. a pie chart representing the latest sales numbers), a character based document (i.e. a typed letter, invoice, email or web page), a photo, X-Ray, CAD-diagram, a form image or an electronic iForm, etc.
Document Status	DocuPhase provides the ability for the designer to create status codes for documents. These statuses can be used to manage an ad-hoc or automated Progression-designed workflow as well as to control documents specific to the application being created. *For example, the status of a Document reflects its current state of "progress" in a business process and its lifecycle. Some example values for Document Status may include: "Pending", "Reviewed", "Signed", "Accepted" and" Rejected".* These Status index values may be selected from a list of choices provided by a UDL associated with the Status index field to update Document Status to indicate where a document currently is in the business process or its lifecycle.
Document Type	Within DocuPhase, a Document Type identifies the type of document contained within an Application. *For example when looking in an Employee folder, what documents types would you expect to see?* *Documents common to all employees' folders might include: Employment Application, Job Description, Time Sheet, Contact information, and Reviews. These commonly encountered types of Documents are examples of Document Types (i.e., Doc Type Index with appropriate code values).* *Other examples of Document Types include Purchase Orders and Receipts, found in a separate Application (filing cabinet) called Accounts Receivable.* *Note: Different Application cabinets tend to house different groups of <u>document types</u> such as for 'HR', 'Inventory', 'Claims', 'Patient Med Chart' just as a paper folder might contain. Also, any single cabinet may contain many different <u>file types</u> such as .docx, .xlsx, .jpeg, .tif, .pdf, etc. and different <u>document-type</u> classifications that are assigned to an index such as for HR: 'Application', 'Offer Letter', 'Termination Notice', etc.*

DocuPhase	DocuPhase is an Enterprise Content Management (ECM) solution that can scale from small to large international enterprise needs.
	It is also known as an advanced Electronic Document Management (EDM) or Enterprise Content Management (ECM) solution that provides a Repository for documents and multimedia files to organize what is considered to be unstructured information as opposed to highly-structured and homogeneous information found in a database.
	The browser-based DocuPhase UI is the primary access hub for primary access to the DocuPhase Platform and its Repository.
	The DocuPhase UI product is also the means for authorized administrators to configure and maintain centralized security permissions and operational control for the DocuPhase Platform.
DocuPhase Database	This is the DocuPhase SQL database that resides on the DocuPhase Database Server. The DocuPhase database stores tables of metadata that describe and configure your installed DocuPhase solution and provide links to your images, documents and files stored in the DocuPhase Platform Repository.
DPI	Dots per Inch (DPI) is a measure of printing resolution, specifically where the number of individual dots of ink a printer or toner can produce within a linear one-inch (2.54 cm) space. For DPI resolution with video displays, there is one pixel per dot.
Drill-Down	Drill-Down is the process of dynamically applying criteria to hierarchical Analytics Objects in Dashboards, Displays and Report to "drill down" to expose the next level of details that support summary information.
	Since Analytics analysis objects may contain many "connected" graphical and non-graphical objects, typically the application of a criteria to one of the objects in an Analysis causes it to "drill down" as well as making synchronized "drill down" changes to its other "connected" objects.
	Typically, this synchronous behavior is automatic unless no "connection" exists or it is explicitly prevented by design.
Dynamic Linking	After doing a DocuPhase Search, the user is able to dynamically link to all other occurrences of the same index field and value across all DocuPhase Application and Index Fields that the User is permitted to access by simply clicking on a displayed index field value on the Results Page.
	Since this search for related records crosses all permitted application having the same index field name – Dynamic Linking is also called Cross-Query Search.

Dynamic Periods	When working with Analyses or Reports it is a common request to be able to display such information as 'Revenue this year to date'. With Dynamic Periods this is possible. The only requirement is that the Time dimension(s) in the Database must have been prepared for Dynamic Periods by the system administrator. To further improve the usability of 'Dynamic Periods', it is possible to set its origin using a pop-up calendar selection tool on the Criteria Bar. The 'Dynamic date origin' section on Smartpad Criteria tab is visible only when dynamic periods are used in global or local criteria or comparisons for the current analysis or report.
ECM	*Enterprise Content Management* (ECM), also known as *Electronic Document Management*, provides the means for efficient capture, indexing, storage, security/permissions control, organization and shared accessibility of documents and files within an organization along with other features. ECM solutions such as DocuPhase provide a Repository for documents and multimedia files to organize: what is considered to be unstructured information as opposed to highly structured information such as stored in a database (see *Repository*).
Entry Point	In Progression, an *Entry Point* is a part of a Start Task definition which serves to introduce document and/or binder objects into workflow as a Work Item object based on a specified set of criteria involving documents, index field states and values. *For example, in a Human Resource workflow such as the Vacation Request Process, the entry point for the process receives the Vacation Request form from the employee.* Once the business workflow process is completed, the Work Item has reached a Finish Task, which is its *Exit Point*, where the Work Item object is removed from workflow and its links to the document and/or binder objects are released; However, <u>the documents involved remain protected and secure within DocuPhase</u>.
Exit Point	In Progression, an *Exit Point* is provided by a Finish Task that removes a Work Item object from workflow releasing its links to its documents and binder objects; However, <u>the documents involved remain protected within DocuPhase</u>.
Forecasting	Forecasting is the process of projecting expected future results based on past and known information.

Graphical Object	A non-tabular Analytics Object such as a Pie Chart, Line Chart, Area Chart, Scatter Chart, Bubble Chart, Radar Chart, etc.
Group 4	Group 4 is a compression method for monochrome bitmaps used by a fax machine. Additionally, it is also available as one of the compression options in the TIFF file format.
Hierarchy	A Hierarchy is an organizational ordering of Dimensions making detailed "Drill Down" searches applied to Analytics Objects possible by providing multiple levels of summarization leading to each supporting level of detail. *Note: Hierarchies are available when the Data Source is supported by data warehouse cubes which are running on Microsoft Analysis Services 2000 or an external Data Warehouse system integrated with an extended DocuPhase Analytics license.*
Index	In DocuPhase, an *Index* is similar to a label found on a traditional paper file folder tab. Index fields stored on DocuPhase database records are used to describe each document of images or media files that are linked to these records. Index fields contain values that are used in search criteria to locate documents, describe a documents type and status as well as other information that are used by all components in the DocuPhase Platform. Index fields in the DocuPhase Platform Repository may be entered (i.e., indexed), viewed and edited by users and automation with the appropriate permissions. *For example, in the Human Resources Application example, Documents are stored and retrieved in folders according to 'Employee Name'. 'Employee Name' is therefore an example of an Index; Social-Security Number (SSN) is another example of an index.* Indexes help to identify Documents. The storage and retrieval of Documents within DocuPhase relies on Indexes, much the same way as traditional cabinets and folders rely on proper labels to locate information, but in a much slower and less-flexible way than DocuPhase.
Indexing	Data entry by manual or automatic database lookup as a means to complete DocuPhase document index fields is an activity called indexing. After completion of the entry for all required index fields and most or all indexes, a document or file may be submitted for capture to the DocuPhase Platform for storage, management and protection.

Indexing Profiles	*Indexing Profiles* are specific DocuPhase definitions that are used by the mCapture App to capture and index photos and submit them to the DocuPhase Platform from a mobile device.
Installation	The Act of installing the software while setting up the deployment. *For example when the user has loaded the Progression Deployment CD and selects the Progression Server Studio Deployment, the act of selecting the Progression Server Studio begins the software installation process.*
Instance	The term Instance refers to each occurrence or copy of an object such as a document, work item, database, physical server, or virtual server.
ISIS	ISIS is a standard software protocol that regulates communication between software applications and imaging devices such as scanners. The TWAIN and ISIS protocol standards are supported by the ScanDox product.
Key Performance Indicator (KPI)	A key performance indicator is a critical measurement factor for assessing the performance of essential tasks, operations or processes in a company related to a company goal. Typically, a KPI will unambiguously reveal conditions or performance that is outside the norm and signal a need for managerial intervention.
Line of Business (LOB)	Organizations and businesses are generally referred to as participating in one or more specific *Lines of Business* (LOB) or industry segments. LOB is a general way to refer to the specific business goals and processes that may vary widely different organizations.
LOB Data Source Model	Similar to the DocuPhase Data Source Model which is integrated with DocuPhase Analytics as a built-in Data Source, each organization using DocuPhase can purchase *LOB Analytics Licensing* to allow them to integrate one or more of their own Data Warehouse and SQL Database systems as Analytics Data Sources. Each of these external Data Sources is generally referred to as an 'LOB Data Source Model' or simply an 'LOB Data Model' that is presented as Cubes of Dimensions and Measures.
Lookup Fields	Documents may have many of their index fields filled with values by automatic SQL database lookup operations performed by the DocuPhase: BarCoder, ScanDox and Data Exchange products. Selected DocuPhase index fields can be configured to perform automatic lookup and fill operations.

Metadata	In general, Metadata is 'Data about Data' or 'Data that describes Data'. Whereas, *Data* is basically data values for metadata such as Index Field values, UDL codes and other configuration parameters.
	In DocuPhase, the DocuPhase database and the index fields it contains describe the digital documents and files that are maintained in the DocuPhase Repository. The index fields for each DocuPhase Application are metadata that describe the documents contained in its virtual filing cabinet.
	In Progression, Document Definitions are an example of metadata that describe the workflow properties for the associated DocuPhase Application and its documents. Through these associated links, Progression inherits DocuPhase metadata.
Mi2	The Multi Index Insert (Mi2) component provides the ability to create multiple document index records in the DocuPhase Database that all reference the same physical document file. Certain index values on each DocuPhase database record can remain constant while other index values can be different or changed based on a lookup on a foreign ODBC and SQL compliant database.
	For example with Mi2, a separate contract record containing its own set of index field values could be created for each hotel in a hotel-chain that all share a common (i.e., the physically same) copy of a contract document image or file. As such:
	▪ Annotations placed on image pages of the contract would be seen by all hotels and only one copy of the image-pages/file would be stored
	▪ Index information related to the same group-hotel contract for each of the hotels in the chain could store independent index values such as Hotel ID, Hotel Name, etc. (except for index values that need to be identical on each record such as Contract ID, Contract Date, etc.).
	As a result, the same Contract images are shared by all hotels in the chain.
Node	In general, a *Node* is a connecting point in a network where several lines come together or processing activity occurs.
	In iDox, a Node is a branched component within the hierarchical Tree View structure that can be expanded or collapsed to reveal or hide its contents when multiple items are present within it.
	In Progression, a Node is a Task object in a Progression Workflow Design Diagram which is connected by workflow routing paths.

OCR	Optical Character Recognition (OCR) is a software function and technology designed to translate images of handwritten or typed text that have been scanned or imported as images.
	This technology is used within the DocuPhase Platform such as Xtractor, iDox, ScanDox and iLink, which are used to extract text-based information from digital images.
ODBC	Open Database Connectivity (ODBC) standards that support communication with SQL databases over a communications network.
	The goal for the designers of ODBC was to make it independent of programming languages, database systems, and operating systems. Thus, any application can use ODBC to query from and exchange data with a database, regardless of the platform it is on or the database solution it uses.
OLAP	On-Line Analytical Processing (OLAP) refers to technology that allows users to think of their business data logically as multidimensional cubes of Dimensions and Measures.
	This matches the mental model that business people have of their enterprise such as: Profits by Product, Sales by Region, etc. allowing them to use tools like DocuPhase Analytics to better visualize and understand their business.
Permission	DocuPhase Security, Scope and Functional Capabilities are authorized using named binary settings (i.e., ☑ – On, ☐ – Off) using centralized Administration features in DocuPhase.
Permission Set	A *named grouping* of <u>related</u> DocuPhase Security, Scope and Functional Capability settings such as the names: 'Capture', 'Workflow', 'Administration', etc. permission sets for Users and Groups as well as 'Forms', 'Revision Controls', 'Index', etc. permission sets for DocuPhase Applications.
Pixel	A pixel is a single point in a graphic image or on a video display screen.
Process	A collection of tasks required to fulfill one complete cycle of events within a business process, with a precise result to be achieved.
	For example, the process definition for handling a "New Hire" transaction includes all the human-attended and automatic tasks associated with the new hire business processing cycle.
	A business process can be a manual process that may or may not use computers; It may also be performed using automated workflow that can be "Ad Hoc Workflow" using DocuPhase routing and queries or fully "Automated Workflow" under a Progression-designed workflow.
	Note: This term can also refer to a Process Object entry in the Progression Studio Dashboard.

Profile	In general, a *Profile* is a group of properties that define or describe the thing being profiled.
	In ScanDox, the Profile describes options for the user, the scanner being used and the type of documents being captured.
	For example, A Checks profile might be created to configure all the information related to the Checks Application. This profile could also include data exchanges, scanning and other special options. Selecting a named-profile immediately sets the required configuration details for you.
	In iRetention, the profile describes the period of retention and other options related to specific DocuPhase Application filing cabinets and types of documents.
	In mCapture, the profile describes the Indexes and options that can be utilized to capture and index different types of photos being captured and indexed on a mobile device.
Progression	Progression is the DocuPhase Platform's Automated Workflow Design Solution in *Progression Studio* that is used to define and maintain workflow processes.
	Once a Progression automated workflow design is completed, DocuPhase users are able to access and use the workflow design to perform the new business process.
	The Progression design solution builds upon the DocuPhase Data Management Core to support the automated workflow of documents and streamlined business processes utilizing the Progression Workflow Engine that works cooperatively with documents securely stored in the DocuPhase Repository.
Progression Lite	*Progression Workflow Lite* is a **subset** of the full *Progression* product's workflow capabilities that allow DocuPhase users to begin working with the basics of 'Rules-Based Automated Workflow' as a powerful alternative or complement to 'Ad Hoc Workflow' and manual workflow methods.
Progression Manager	Progression Manager is an operational automated workflow tool in *Progression Studio* that allows supervisors and managers with the appropriate permissions to view *Progression Workflow Diagrams* that can also display the real-time status of work completed, pending, resource assignments and performance statistics for any selected nodes on the workflow diagram.
	This tool also allows supervisors and managers, with the appropriate permissions, to dynamically re-allocate resources to areas with bottlenecks and as needed from their web-browser on a temporary or permanent assignment basis.
	Progression Manager is available under both full Progression and Progression Lite licenses.

Progression Studio Dashboard	The Progression Studio Dashboard is a free-floating and dockable window that displays Process Design Components and Tool Accelerator icons plus Right-Click Rapid Access Menus that make it the central design tool for Progression workflow business processes as well as for Management and Supervisors using the Progression Manager features for near real-time monitoring.
	This Studio is a client program that is installed on a workstation.
Real-Time	Real-Time refers to actions being recorded and possibly reported as information at approximately the actual time of occurrence.
	Note: The actual duration and frequency supporting the analysis and reporting in 'approximate real-time' is relative to actual timely needs and the demands of the volume of data and processing overhead which can range from an elapsed time of few seconds to many minutes, hours or, even several days before reporting updated results on a suitably timely basis.
	DocuPhase permits many sampling and refresh rates to be configured to reflect actual needs and performance overhead.
Repository	DocuPhase stores and manages its content in an integrated Database that contains metadata that describe the content and a File Repository that holds the image and file content.
	In general, the term Repository may refer to the overall DocuPhase content, but it specifically refers to the actual content recorded and stored as digital images and files that are organized by the DocuPhase Database which contains records that describe each document/file that are automatically indexed by a unique document Object-ID key.
	DocuPhase can store and manage any Document type for your organization.
	Additionally, the DocuPhase Repository is a centralized location in the organization's network that stores all content within the DocuPhase system. The DocuPhase Repository and its DocuPhase database allows for the structured storage, access, management, exchange and protection of enterprise information.
	DocuPhase is designed to categorize and archive all forms of intellectual property, including multimedia presentations, PowerPoint presentations, spreadsheets, marketing literature, word processor Documents, Adobe PDF files and sound files such as in .mp3 and .wav file-formats.
	DocuPhase can store and manage any document file type you can store on your desktop workstation.

Revision	A Revision is a representation of a document at a point in time. A document can go through many revisions. DocuPhase can track the revisions of the documents and maintain a history of the document along with: who, what and why the changes were made. *For example, when a document has been checked out and checked back in after changes were applied to the document under Revision Controls, each action will create a unique document revision number. This number is displayed in both the Search results as well as in the Object Table within the repository.* *Note: The Revision Control option must be activated and permissions granted in order to use Check-Out and Check-In features along with revision tracking with DocuPhase.*
ScanDox	ScanDox is a DocuPhase component that can accept digital files that are dragged-and-dropped to it or paper document images provided by a scanning device; plus, index the document and file content as well as support automatic-fill of index information by look-ups using external databases before submitting document items to the DocuPhase Platform as protected and searchable documents. Captured items stored in the DocuPhase Repository can be selected and reworked in ScanDox and returned to DocuPhase. Both iLink and DocuPhase UI can launch ScanDox as needed plus it can be launched independently for local and remote upload of content to the DocuPhase Platform.
Scanner	A scanner is a device that optically acquires and analyses images, printed text or handwriting and converts it to a digital image. In other words, it converts paper images to digital images.
Scanning	The act of optically analyzing page images and digitally encoding them for storage in the DocuPhase Repository as a document/file. Documents may be composed of one or more pages that are converted to digital images for capture in the DocuPhase repository. Typical scanned formats for documents are TIFF and PDF.
Server	In the context of this manual, when a Server is used, it is a reference to a server application and depicts a physical or virtual (VM) server machine.
Service	In the context of this document, the term *Service* refers to software that runs in the background supporting the operations of the DocuPhase ECM and/or Progression-defined workflow solutions.

SQL	*Structured Query Language* (SQL) is a database computer language designed for accessing and managing data in Relational Database Management Systems (RDMS) with its origins based upon a relational algebra developed by Edgar F. Codd in 1970.
	The term is typically pronounced as "S-Q-L", but is also referred to as "Sequel".
	SQL has evolved along with Open Database Connectivity Standards (ODBC) to be the "interface of choice" for connecting and integrating with SQL-compliant databases across local and wide-area networks.
SSL	Secure Sockets Level (SSL) are networking protocol standards that allow high-security authentication for access attempts and the secure encrypted transmission of information content over a network that is available with the DocuPhase Platform.
Status	A state indicator as an index field for an object (e.g., document) that indicates its condition or current progress within a business process at a particular point in time.
	For Example, the workflow process status for an invoice at different stages of its processing by Accounts Payable might be: Pending, In-Process, Posted, Completed, Suspended or Cancelled.
Step	In Progression, one or more Steps can be defined within a Task; multiple Tasks can be defined within each Process.
Submit	In the context of the DocuPhase Platform, Submit refers to "Submit to DocuPhase" which is an event where a document or iForm is captured in the DocuPhase Platform Repository.
	The submit operation can be directly passed to DocuPhase locally or via a remote upload process provided by the ScanDox and Uploader products.
	Microsoft Office Add-Ins for DocuPhase provide the ability to use their 'Submit to ScanDox' button to pass an office-document copy to ScanDox for capture processing & indexing before the office-document item is submitted to DocuPhase.
Sub-Process	A collection of sub-tasks which are called in its entirety to act as part of a larger parent process (i.e., a process within a Process).
	For example, in the Human Resource Application, the new hire cycle might include sub-processes such as reviewing the résumés and scheduling interview times. These sub-processes are supporting pieces to complete the entire new hire cycle.

Subscriber	A person who subscribes to an alert or Progression workflow task as well as a monitor for Wait Tasks. In other words, a subscriber is a user that is able to receive an alert or workflow work item to process as well as to monitor and optionally override Wait Task Rules. *For example, iAlerts Manager enables the user to choose a Subscriber from DocuPhase Users and Groups and/or members of your MS Outlook contacts list.* Similarly, users of a Progression-designed workflow can be registered as subscribers for specific workflow tasks. As work items become ready for processing by a task, its subscribing users are able view and/or access the task for processing from their DocuPhase Workflow user interface.
System Status	DocuPhase maintains a status on all documents in the repository. This status tracks whether the document is searchable, deleted or waiting to be indexed or scheduled to run in an external application to perform a task. *For example, the system-status of a document may be in the 'R' status, which indicates the document is waiting to be picked up by Data Exchange Services to look up and synchronize data.*
Table	Tables are used for displaying data in a simple row format which can be used to display large amounts of data with many different data types. In Analytics, a Table object is only allowed to have one (1) dimension and one (1) measure. *Note: A Table and Cross Tab object differ in capabilities since the Cross Tab object is able to accommodate multiple dimensions and multiple measures and is the structure that is more commonly used to hold the underlying data for Analytics Analysis, Dashboards and Reports.*
Tabular Object	An Analytics non-graphical object which may be either a Table or a Cross Tabulation object.
Tag	A Tag is a special index that groups documents within and/or between applications by storing a common keyword in a free-form index field. The ability to add, view, or modify Tags is managed by an application level permission. *For example, a user may want to conduct a meeting regarding a subset of documents that are not linked by common index field. A meeting organizer can Tag each document with a common keyword and notify other members in a meeting to perform a Tag search with this keyword.* Users can now view all of the documents pertaining to the meeting with one quick search versus performing multiple searches across all applications to identify the documents pertinent to the meeting.

Task	A single step or collection of steps within a workflow process required to advance the process and route a work item to the next task based on the result-of-performing the current task – These Tasks may be fully-automated or operator-attended depending on their Task Type.
	For example, in the Human Resource Application, a new hire Process might include Tasks and Steps for: creating a job posting, advertising the position, receiving potential employee resumes, reviewing the resume, calling the potential employees, setting up interview times, physically interviewing the candidates, discussing the candidate qualifications with other employees, creating an offer letter, receiving the executed offer letter and finally physically creating office space for the candidate.
	– The result of each Task determines the output path taken for the current work-item to its logical and appropriate Task in the business process.
Throughput	The number of DocuPhase document changes, Progression process instances or work items that can be processed by the Progression Engine or Progression Web Services in a given time period.
	In other words, it is the quantity or rate of work that can be accomplished in a specific time interval (e.g., work-items/hr).
TWAIN	TWAIN is a standard software protocol that regulates communication between software applications and imaging devices such as scanners.
	Both the TWAIN and ISIS protocol standards are supported by the ScanDox product.
UDL	A *User-Defined List* (UDL) of values is a DocuPhase definition that can be shared by one or more index fields to make data entry more convenient by making a selection instead of typing as well as ensuring that only consistent index values are entered.
	A User Defined List (UDL) provides a list of unique choices of data values that may be selected by a user to fill an associated index field. More than one index field may be associated with the same UDL object in the same Application cabinet or different cabinets so that the same list of values will drop-down for selection for the associated index field. Using common UDL-values, is a powerful way to improve the ability to compare and search for index-field values.
	In Progression automated workflow and DocuPhase Ad Hoc workflow, Status codes which indicate the progress state for an object in workflow are defined as UDL sets of values.

UNC / URL	The Microsoft Windows *Universal naming Convention* (UNC) specifies a common way to describe the location of a network resource such as a: shared file, directory, printer or DocuPhase repository document file. A UNC is often referred to as a Web Address or Uniform Resource Locator (URL) as well as a Uniform Resource Identifier (URI). A general UNC example is: '\\ComputerName\SharedFolder\NetworkResourceId'.
Viewer	A pane or window where document pages (i.e., images of pages) are viewed as well as multi-media files can be played, seen or heard by an end-user. The viewer is variously referred to in different contexts as: Document Viewer, Page Viewer, Image Viewer, Results Viewer, Thumbnail Viewer. Page viewer capabilities exist in DocuPhase, ScanDox and CDViewer plus the images of work-item documents (in binders) can also be viewed. Currently there are two (2) document-page viewer options available for use with the DocuPhase Document Management and Workflow Business Process automation: • The *Lightweight* HTML5 browser-based viewer that does not have to be installed on any of the many workstation, laptop or mobile devices using a web-browser. • The *Heavyweight* client viewer that must be downloaded and installed on the workstation or laptop – It is not available or appropriate for use on mobile devices. ScanDox utilizes its integrated *Heavyweight* viewer only.
Work Item	In Progression, an instance of work within a process is called a Work Item. The Work Item is a Binder object that contains one or more documents that are needed to complete the work cycle for a Process. *For example in the Human Resources Application New Hire Process, the work item is the collection of items such as an 'Employment Application', 'Interview Notes', 'transcripts' and other documents needed (in a work-item Binder) to complete the New Hire Process decision to interview & possibly hire or reject the application for employment.*
Work Item List Permission	A Progression permission option that presents the Work Item Viewer as a list of available work from which a workflow-user may make a selection when the option is set to On. With the option Off, the workflow-user is presented with a *Go to Work* button that is used to retrieve the next work item to which they subscribe in priority order to be processed.

Work Item Viewer	With appropriate permission, workflow-users may view and select the available work items they would like to process next in workflow. *Note: Without this permission, workflow-users are provided with a "Go To Work" button that will supply them with the Next appropriate work item to process in workflow.*
Work Pool:	A Work Pool is a group or collection of process work items waiting to be worked on at a defined process task. *For example, Progression Resources subscribe to a work pool to receive work. Multiple Resources can subscribe to the task and each individual's work can be prioritized, allowing for an efficient and automated load balancing without manual interaction or queue management.*
Workflow	From a design perspective, A workflow is the process description of how tasks are performed, by whom (its subscribers), in what order and how completed. *For example, in the Human Resources Application New Hire Process, the Workflow is defined by the Tasks of the new hire cycle. The series of tasks necessary to complete the new hire cycle denote the Workflow.* From an operational perspective, a workflow is comprised of how tasks are structured, which resources are required to perform them, their order, how they are synchronized, how information flows to support the processes and tasks within, how tasks are being tracked and how long it takes to complete those processes and tasks. DocuPhase is able to support "Ad Hoc Workflow" based on its queries for pending work and routing capabilities where operator decisions determine the flow of work. The Progression product allows a fully automated workflow controlled and enforced by embedded business rules to be designed to determine the flow of work – Thus, extending the DocuPhase capabilities by using automated workflow to streamline, improved and achieve much more consistent business process performance.
Work-Item Task	A work-item task is an instance of a defined Progression Process Task that is represented at run-time by a work item (i.e., a Binder of one or more documents) that is flowing through each of the appropriate Tasks for its workflow business Process.

Appendix A: DocuPhase Installation

DocuPhase is a Web-based application running on 2008 or 2012 server environment with a Microsoft SQL Server 2008/2012 database and Windows file sharing image repository. The Application Server portion utilizes Microsoft Internet Information Services (IIS) as well as other services, including:

- License Service,

- Full Text Service and

- Document Server Service.

All these components and services may be distributed to run on separate server machines for load balancing and distributed processing.

DocuPhase provides full support for VM and VM Enterprise Management. Virtual Machine environments may run on different physical servers. DocuPhase licensing takes this potential re-allocation of physical servers into account allowing such physical reconfiguration to occur dynamically without breaking DocuPhase Platform software licenses.

This section provides only an overview of installation and upgrade requirements for DocuPhase. Full installation details are provided in the *DocuPhase Installation and Upgrade Gu*ide for use by technical IT staff supporting the installation.

> *Important Note:* *The current DocuPhase Platform is qualified and supported for use with* <u>*Microsoft Internet Explorer 9 (IE 9) and above*</u>*.*
>
> *However,* **<u>IE "Compatibility" mode should not be used</u>** *since it limits functionality – Should this mode be specified, it will be ignored by DocuPhase.*

Prerequisites & Minimum Requirements

The following DocuPhase installation and upgrade consideration topics are documented in the following locations:

- **Minimum Requirements:** See *DocuPhase Prerequisites Guide*
- **Prerequisites:** See *DocuPhase Prerequisites Guide*
- **DocuPhase Installation of:**
    - **DocuPhase Database**
    - **DocuPhase Server**
    - **DocuPhase Service**
    - **Required & Optional Component Products for DocuPhase**

    For more detail, see: *DocuPhase Installation & Upgrade Guide*.

Important Note: When upgrading to a new version of DocuPhase, ALL Users should clear their browser cache AFTER the upgrade is installed and BEFORE using DocuPhase.

System Administrators, please ensure that your user's are aware of this essential requirement and how to do it to avoid possible confusion or problems when they begin to use the upgraded DocuPhase release.

Important iForms Server Installation Note:
*If iForms is being installed in an environment where users may be accessing DocuPhase/iForms from mobile devices (i.e., iPads or other Tablets) it is essential to edit the Config Table (DocuPhase Database) entry for the "iForms Service URL" **AFTER** the iForms server installation has been completed.*

For Example:
*If this current table entry is set to **http://machineName:8082**, it must be changed to something like **http://machineName.company.loc:8082**.*

Please consult with your IT or Operations Department for the proper full-domain name to use.

Appendix B – Creating an Application Checklist

When preparing to design and configure Application cabinets in DocuPhase, the following checklist may be a helpful tool to consider the many ways the cabinets and their indexes may be used for Capture, Forms, Document Management and Workflow.

Properly prepared, the DocuPhase configuration process will typically will be easier and less prone to errors and omissions.

Application

Application Name (Virtual File Cabinet): _____

Application Description:

Indexes

List the Indexes to be used as Search Criteria (e.g. SSN#, Name, Doc Type, Status, etc.) in Index Display Order. What will be the most common Search parameter?

Order	Index Description	DocuPhase Index Name	Index Type	UDL	Req	Sticky	ME	ILS	DB

Keep Index Fields as Short as Possible for Data Entry or based on an UDL selection.

Column Heading Legend:

- Order – The display order index fields should appear for searches and indexing
- Index Description – Briefly describe the index field
- DocuPhase Index Name – Enter the name to use in DocuPhase
- Index Type – Enter the Index Type name defined or to be defined in DocuPhase
- UDL – Enter the User Defined List (UDL) name defined or to be defined in DocuPhase
- Req - When manually indexing, index value must be supplied
- Sticky - When manually indexing, value remains after item is submitted
- ME - Indicate Multi-Edit, if this index can use a value to change several items at once. Often used with ad hoc workflow status codes and other purposes.
- ILS – Indicate if Index-Level Security is needed for this index to restrict selected user or groups of users from accessing a sensitive information field.
- DB = Indicate if the values for the index field will be pulled from an external Database.
    - Is there an External Database to enhance the Data Entry Operation?
    - List Databases and their ODBC Names, Tables and Fields.

User Defined Lists

List the names for User Defined Lists (UDLs) to be used as values for index fields (e.g., Doc Types, Status Codes, etc.) in DocuPhase.

Is there an external database that can be used to supply the UDL values or will the UDL codes be explicitly defined string and/or numeric values?

Attach a listing of all User Defined List (UDL) Type Names above their explicit code values in each column or attach a listing of the their database source and current values.

UDL Types / UDL Values

UDL Name: _____	UDL Name: _____	UDL Name: _____	UDL Name: _____

Application Linking

List Other Applications that may have relevant information that will need to be cross-referenced to items stored in this Application. (For example the relationship between PO's, Invoices and Checks)

Other Related Applications

1) _____
2) _____
3) _____
4) _____

List the common index fields between related Applications.

Other Related Indexes

1) _____
2) _____
3) _____
4) _____

What will be the formal names of the indexes?

Formal Index Names

1) _____
2) _____
3) _____
4) _____

Note: In order to optimize the effectiveness of Dynamic Linking (i.e., Cross Query), it is important to use the <u>same</u> Index Field Names with the same value domains (e.g., same datatypes, UDLs, etc.) for corresponding information in each of the related Application Cabinets. This will improve the ability to search and locate related information across cabinet boundaries.

Workflow

List Fields to be used to drive Ad-Hoc Workflow (Status, Assigned User, Process ID) and management reports for production metrics.

1) _____
2) _____
3) _____
4) _____

Draw an initial Flow diagram of the Workflow Process and indicate State/Status:

Security, Access and Permissions

Users First Name: _____

Users Last Name: _____

User ID: _____

User Password: _____

User Permissions:

System Level Permissions		☐ Select All
Capture ☐		
☐ Hide iLink Update Prompt	☐ Perform iLink Index Update	☐ ScanDox
Configuration ☐		
☐ InBox	☐ Index Type Add	☐ Index Type Delete
☐ Index Type Update	☐ Pre Sort Application	☐ Pre Sort Person
☐ User List Add	☐ User List Delete	☐ User List Update
Search ☐		
☐ Application Add	☐ Application Delete	☐ Search All Applications Checkout
☐ Search Any User Checkout		
Workflow ☐		
☐ Calendar Edit	☐ Priority Edit	☐ Progression Studio
☐ Reassign Any Task	☐ Reassign Tasks	☐ Work Item List
Analyses-Reports ☐		
☐ Analytics Admin	☐ Analytics Design	☐ Analytics Executive Dashboard
☐ Analytics Operational Dashboard	☐ Analytics Performance Dashboard	☐ Analytics Viewer
☐ System Reporting		
Administration ☐		
☐ FTP Config Access	☐ Remove Session	☐ System Options Update
☐ User Add	☐ User Disable	☐ User Group Add
☐ User Group Delete	☐ User Group Update	☐ User Update

Application Permissions:

Cabinet Management ☐ Select All

Index ☐
☐ Index Add | ☐ Index Delete | ☐ Index Update

Application ☐
☐ Application Management | ☐ Application Update

Account Functionality Management ☐ Select All

Forms ☐
☐ Form Create Edit | ☐ Form Delete | ☐ Form Fill

RevisionControl ☐
☐ Delete Revision | ☐ Document View Revisions | ☐ Promote Revision
☐ Revision Control | ☐ Undo Any Checkout

Indexing ☐
☐ Indexing Edit | ☐ Indexing MultiEdit | ☐ Manage Indexing Profiles
☐ Manual Indexing | ☐ Route Application | ☐ Route Person

Annotations-Notes ☐
☐ Annotation Add | ☐ Annotation Edit | ☐ Annotation Edit Own
☐ Annotation View | ☐ Hide Redaction | ☐ Note Add
☐ Note View

Tagging ☐
☐ Add Tag | ☐ Remove Tag | ☐ Rename Tag
☐ View Tag

Saved Queries ☐
☐ Modify Shared Queries | ☐ Query Delete | ☐ Query Save
☐ Share Query | ☐ View Shared Queries

Operations ☐
☐ Document Hard Delete | ☐ Document History Report | ☐ Document Soft Delete
☐ Download Document | ☐ Edit Object Status | ☐ Email
☐ Export | ☐ Open PDF Documents In Viewer | ☐ Print Image
☐ Scan Image | ☐ Search Document Text | ☐ Show All Statuses
☐ Upload File

Application Access (What File Cabinets can be accessed?)

1) _____
2) _____
3) _____
4) _____
5) _____

Document Level Security (What UDL in a Cabinet can be Accessed?)

1) _____
2) _____
3) _____
4) _____
5) _____

Analytics Permissions

Analytics (Any Custom External Database/Folder Additions to the DocuPhase Supplied data sources?)

Analytics Permissions

Databases		☐ Select All
Grant	**Database**	**Cube**
☐	iSynergy User	
☐	Progression User	
☐		UserReport
☐	Cube_db_1	
☐		Applications
☐		Documents
☐		Status
☐		AnalyticsBatches

Folders		☐ Select All
Grant	**Folder**	**Write**
☐	Cube_db_1_Folder	☐
☐	FolderCreatedViaAnalysis	☐
	Shared	☐

Appendix C – DocuPhase Status

Fixed Object Status Codes

E: Searchable Documents (Appear in the result set for a search in the system.)

P: Manual Indexing (Appear in the Manual Indexing screen for user intervention.)

I: Routed to Inbox (Documents routed to an individuals or groups inbox.)

X: Deleted (Documents that have been soft deleted.)

C: Corrupt (Documents that have been determined to be corrupt or of incorrect resolution.)

Y: Source Copy (Large multi-page TIFF files that have been separated into smaller sections are retained.)

Standardized Object Status Codes

A: Xtractor (Documents to be processed by Xtractor Recognition.)

R: Data Exchange (Documents to be processed by Data Exchange Service.)

V: RapidDoc (Documents to be processed by RapidDoc stations.)

M: MultiFunction (Documents to be processed by MultiFunction Service.)

Note: Although these are the standard (i.e., normally used) object-status codes, the DocuPhase and Progression designers/administrators have the responsibility to establish and properly configure how and where these status codes are interpreted.

Appendix D – DocuPhase Service

DocuPhase Service is a Windows service installed on the DocuPhase web server that is responsible for:

- Monitoring the incoming folders for all DocuPhase applications. When the folders are dropped in, DocuPhase Service enters a record in the appropriate database for the files.
- Moving each file to the proper repository and renaming the file with the correct file name.
- Monitoring printing activity in the DocuPhase system and writing a record to the event log each time a TIFF image is printed from the system.
- Assisting the export function to write image files and data for the selected export.
- Supporting the import function by reading the import files, and inserting the records into the database as well as the images into the repository.
- Maintaining the directory structure in the repository with regard to the application subfolders.

Troubleshooting DocuPhase Service

The following common problem is encountered when a User attempts to print a Document when the DocuPhase service is not running.

> ⚙ **ERROR: DocuPhase server is not responding to print requests.**

To troubleshoot this error message, follow these steps:

1. Navigate to the Windows Start Menu.

2. Right-click My Computer.

3. Select Manage.

   Note: The Computer Management dialog displays.

4. Expand Services and Applications.

5. Select Services.

6. In the right pane, right-click DocuPhase Services

7. Select Start.

8. Log back into DocuPhase and verify that Documents will now print.

Error Codes

Code	Error	Description
-1	INVALID_PRIMARY_KEY	Error during database I/O that returns a primary key.
-7	EXCEPTION_ENCOUNTERED	Negative return codes
-666	UNINITIALIZED_INTEGER	Negative return codes
0	SUCCESS	Always zero
1000 - 2000 block – O/S Errors		
1001	FILE_NOT_FOUND	O/S Errors
1002	FILE_INSUFFICIENT_PERMISSIONS	O/S Errors
1003	FILE_LOCKED	O/S Errors
1004	IO_ERROR	O/S Errors; An external process that started, failed.
1005	EXTERNAL_PROCESS_FAILED	O/S Errors
1006	UNABLE_TO_OPEN_FILE	O/S Errors
1007	INVALID_CMD_LINE_ARG	O/S Errors
2000 – 3000 block – Database Errors		
2001	DB_UNABLE_TO_CONNECT	Database Error
2002	DB_SQL_ERROR	The database query returned an SQL error.
2003	DB_REQUIRED_FIELD_MISSING	A required field is missing a value.
2004	DB_CONNECTION_CLOSED	The underlying connection to the database is closed.
2005	DB_INSUFFICIENT_PERMISSIONS	The account accessing the database lacks permission to perform the current operation.
2006	DB_CONFIGURATION_ERROR	The database configuration file is incorrect.

Code	Error	Description
3100 – 3200 block – Security errors, authentication and authorization		
3100	INVALID_CREDENTIALS	The user could not be authenticated with the given credentials.
3101	INSUFFICIENT_PERMISSIONS	The user does not have access to a document or process.
3102	ACCOUNT_DISABLED	The user's account has been disabled.
3103	ACCOUNT_CLOSED	The user's account has been closed permanently.
3104	PASSWORD_EXPIRED	The user's account has an expired password.
3105	MISSING_CREDENTIALS	A SOAP request was received without user credentials such as a UsernameToken.
3106	USER_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
3107	PASSWORD_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
3300 -3400 block – DocumentServer Errors		
3301	INVALID_URI	The URL does not contain the necessary elements.
3302	APPLICATION_NOT_FOUND	The application specified by a database alias and application does not exist in the database.
3303	DOCUMENT_NOT_FOUND	The document specified by a database alias, application id and document id does not exist in the database.
3304	USER_NOT_FOUND	The given user id could not be found in the database.

3305	APPLICATION_NOT_IMPLEMENTED	Documents can only be served within implemented applications.
3306	DOCUMENT_SERVER_DOWN	The document server is not accepting requests.
3310	APPLICATION_NOT_LICENSED	The requested document belongs to an application that is unlicensed.
3311	LICENSING_NOT_INITIALIZED	The licensing manager has not been initialized.
3312	INVALID_LICENSE	The license file is corrupt.

Code	Error	Description
20000 -20099 block – Data Object Model		
20001	INVALID_DATA	Data Object Model
20002	INVALID_TYPE	Data Object Model
20003	INVALID_DATABASE_TYPE	Data Object Model
20004	EXCEPTION_EXECUTING_SQL	Data Object Model
20100 – 20199 block – Data Object Model		
20101	INACTIVE_TASK	Workflow Object Model
20102	INACTIVE_PROCESS	Workflow Object Model
20103	UNAUTHORIZED_SUBSCRIBER	Workflow Object Model
20104	NO_PRECEDING_TASK	Workflow Object Model
20200 -20399 block – Image, Document Centric Errors		
20200	INVALID_DOC_TYPE	Image, document centric errors an invalid document type was accessed given the current context.
20201	OCR_FAILURE	Unable to OCR document.

Appendix E: DocuPhase UI Heavyweight Viewer

Overview of DocuPhase Viewers

The DocuPhase repository is capable of capturing, storing, protecting and presenting virtually any type of digital file content.

Note: The built-in viewers for the DocuPhase platform handles a wide variety of commonly-used general file formats such as: TIFF, PDF, JPEG, HTML, MSG & other image formats as well as Microsoft Office: Word, Excel, PowerPoint, Outlook formats that display in the DocuPhase UI viewer pane frame.

However, there are many other specialized file formats that can be stored in DocuPhase that require or benefit from specialized 'Viewers' to play audio & video files, present view-only display of engineering CAD drawings, Project Plan files, etc. as well as invoking fully capable viewing, editing, and updating software such as Microsoft: Visio, Project, Word, Excel, PowerPoint, Publisher; advanced CAD software, etc. These custom viewers are often presented outside of the DocuPhase viewer pane frame in a separate browser tab or window.

In order to view and work with DocuPhase repository content different viewers are used:

- **HTML5 Lightweight Viewer** – This is the web-enabled viewer used with the DocuPhase user interface that provides a full range of document viewing, annotation and manipulation capabilities which can be used from a browser on a variety of workstations, laptops and mobile devices such as tablets and smart phones. This viewer can be used to both view and update annotated and changed pages (e.g., rotated images) of documents/files in the DocuPhase repository.

- **ActiveX Heavyweight Viewer** – This is the client viewer that provides a full range of document viewing, annotation and manipulation capabilities which must be downloaded and installed on the workstation before it can be used with:

  - **ScanDox –** The Heavyweight Viewer is integrated into the ScanDox capture product's user-interface frame to allow the capture-user to view and navigate the pages present in each selected item being captured.

    Note: Only the Heavyweight Viewer will be available for use in the viewer pane for the ScanDox UI frame and it is automatically installed with ScanDox.

  - **DocuPhase UI –** The Heavyweight Viewer can optionally be selected as the preferred viewer for use with the DocuPhase UI when the Microsoft Internet Explorer (IE) browser is used since this has been the only fully-featured viewer prior to release 6.1.

    Important Note: *The Heavyweight Viewer preference setting is only applied when DocuPhase is used from the IE-browser, all other browsers such as Safari, Chrome, Firefox will automatically use the HTML5 Lightweight Viewer irrespective of the View Tab preference setting.*

The Heavyweight viewer can be used to both view and update annotated and changed pages (e.g., rotated images) of documents/files in the DocuPhase repository much like the new HTML5 Lightweight Viewer.

Note: The continuation of the Heavyweight option within the DocuPhase UI is expected to be temporary while the transition to the on-going use of the HTML5 Lightweight Viewer is made during this release.

- **Custom Viewers** – Can be View-Only or fully-functional software programs that are capable of advanced viewing, editing, copying and/or saving edited versions of documents & files stored in the DocuPhase repository for specific types of files (e.g., Visio .vso, MS Project .mpp, etc. files) when DocuPhase security and revision controls permit it.

  Often, a view-only or static rendering is available in-frame, but with the option to select or elect to use a Custom Viewer or software to provide advanced access, update and features for working with a selected document or file.

  For example, a Microsoft Office Word document can be viewed, edited in Word by using the DocuPhase supplied 'Open in Word' button, on the Heavyweight Viewer's Top Toolbar, as shown below.

  The revised copy can be saved using Word and/or Returned to DocuPhase as a revised document replacing the original or as the latest revision under enabled Revision-Control features.

- **CDViewer** – A simple view-only viewer integrated into the CDViewer product component which is used solely for viewing exported subsets of documents on a portable media.

Now that both the new and improved HTML5 Lightweight Viewer and the ActiveX Heavyweight Viewer components offer a full-range of Document Page viewing, annotation, manipulation, check-out, check-in and save capabilities supporting the DocuPhase browser-based user interface, the use of the client-based Heavyweight Document Page Viewer with the DocuPhase UI will soon be phased out. However, the Heavyweight viewer will continue to be used as an integrated part of the ScanDox item-capture product.

Document Viewer Pane

Within the Document Viewer Pane, a user is able to view and manipulate images of document pages.

The fully-featured ActiveX **DocuPhase Document Image Viewer** has a broad range of image and annotation viewing and updating capabilities that are explained in the following sections.

- The Microsoft Internet Explorer (IE) web-browser can use either the HTML5 Lightweight Viewer or the DocuPhase Heavyweight Viewer when the preference setting is unchecked (i.e., Off), as shown below.

Use the Heavyweight Viewer when this Option is Set to Off

Top Toolbar – DocuPhase Full-Function Viewer

Document Page Viewer Pane
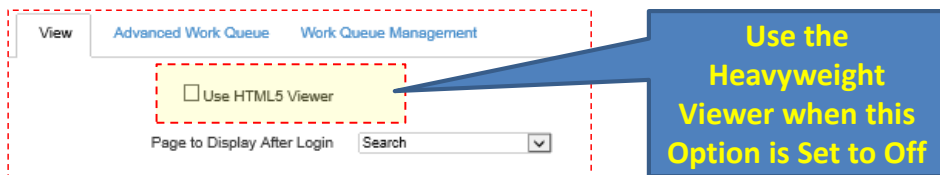
Bottom Toolbar
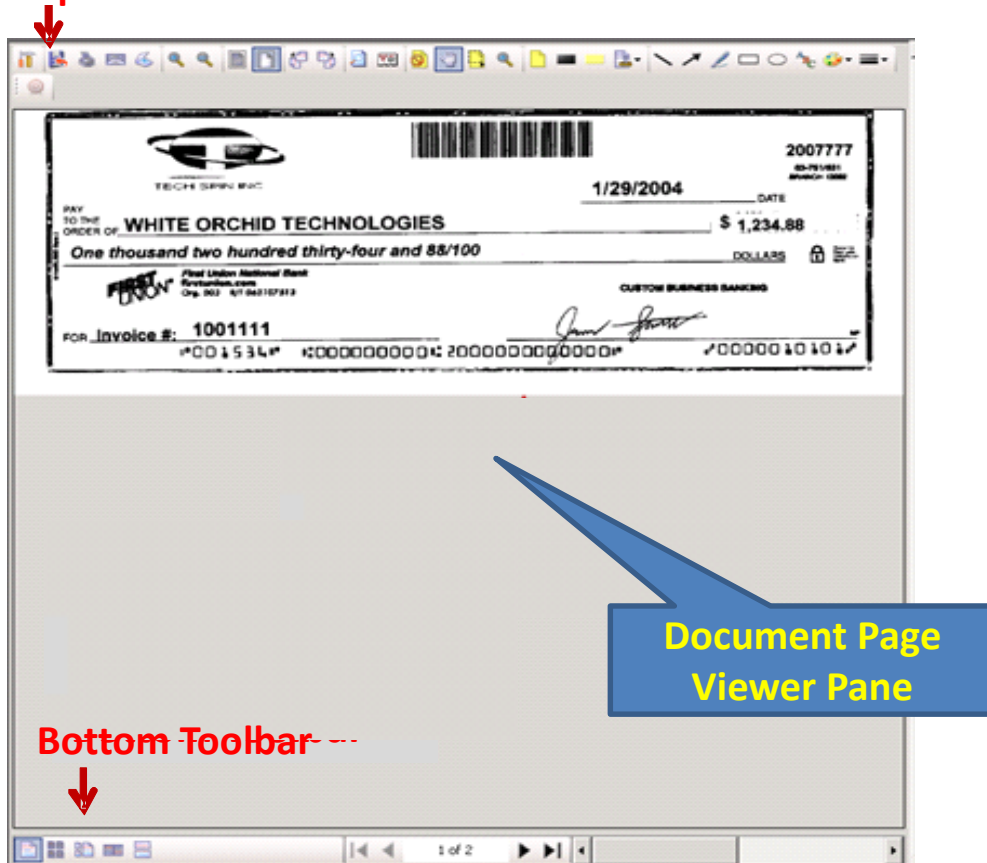
- Other browsers such as Google's Chrome, Apple's Safari and Mozilla's Firefox web-browsers can <u>only</u> use the full-functionality HTML5 Lightweight Viewer.

Examples of functions performed within the Document Viewer Pane using the Heavyweight DocuPhase Viewer include:

- Document navigation for pages and on page images.

- Make annotations on Document page images.

- Zoom in and Zoom out to change magnification on Document page images

- DPI awareness makes annotation Text Sizes consistent with user preferences.

- Rotate Documents.

- Able to find, extract and show text content (i.e., Full Text) from within the displayed image, locally print individual or multiple pages of Documents.

- Scan Documents to append to the current Document in the Viewer Pane.

- Locally email selected pages of a Document or the entire Document.

The Document Viewer Pane contains the Top Toolbar, the Document image, the Bottom Toolbar with thumbnail/book view options, and the Page Scroll.

The **Document Viewer Pane Toolbars** provide access to the functionality of the Document Viewer Pane. The toolbars become active once an image is loaded.

> ☑ **Note**: Many viewer tools are permission specific and may not be seen by all users.

Top Toolbar – DocuPhase Full-Function Viewer
This toolbar is located at the top of the DocuPhase full-function Document Viewer Pane.

The viewer options shown as icons are grouped into eight (8) functional categories. Right-click anywhere on the Top Toolbar to activate a drop-down menu listing toolbar options which can be activated by a checkmark or deactivated by clicking the checkmark off.
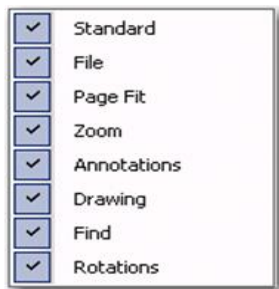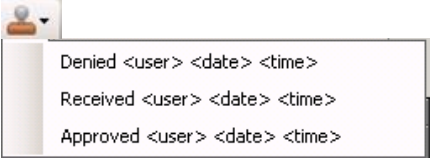
The Top Toolbar image shows a list of all toolbar icons since all of the above groups are check marked.
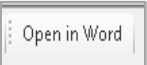
The following table gives a brief description for the function of each icon on the top toolbar.

Element	Top Toolbar Element Description
Settings	Use this icon to set user default preferences for Printing and Emailing, as well as the PDF Viewer control settings.
Save A Copy	Saves changes made to the document.
Print	Prints or faxes document selections using local drivers.
Email	Use this icon to email the complete document or individual pages using the popup Email dialog box.
Scan	Initiates the Scan component (e.g., ScanDox) of DocuPhase per the appropriate license you have been assigned. This option is used to append to the document currently in the viewer.
Zoom In	Zoom In to obtain a larger and closer view of the displayed document page image .
Zoom Out	Zoom Out to obtain a broader view of the displayed document page image.
Zoom to Region	Select a rectangular area on the displayed page image to magnify using the crossbar-cursor tooltip. *Note: The crossbar-cursor tooltip remains available for subsequent region selection, but can be replaced by the panning-cursor tooltip when the Pan icon is selected.* *Note: The magnification and position of the region is retained for other image pages of the same or different documents until a Zoom In, Zoom Out, Best Fit or Fit to Width operation is performed to clear the region setting.*
Best Fit	Best Fit expands or contracts the image in the View Frame allowing the entire image to display.

Element	Top Toolbar Element Description
Fit to Width	Fit to Width expands or contracts the image in the View Frame allowing the entire width of the Document to display
Rotate Left	Rotates the Document selection left in 90-degree increments
Rotate Right	Rotates the Document selection right in 90-degree increments
Find	Used to search and highlight specific full-text content within a Document obtained from the Optical Character Recognition (OCR) process.
Show Text	Displays the full-text content of words found within a document obtained from the Optical Character Recognition (OCR) process in a text window. *Note: The extracted text can be viewed, copied, pasted or printed as needed.*
Hide Annotations	Use this icon to hide annotations on the selected Document.
Pan	Use this icon to navigate across the surface of a zoomed in Document's page image.
Select Annotation	Use this icon to select annotations or redactions to overlay onto a page image.
Insert Annotation	Use this icon to insert an annotation as an overlay onto a page image.

Element	Top Toolbar Element Description
Insert Redaction	Use this icon to conceal sensitive information as an overlay onto a page image. This may be done with any color with black as the default color.
Insert Highlight	Use this icon to highlight information on the Document as an overlay onto a page image.
Insert Rubber Stamp	Use this icon to Insert a Rubber Stamp as an overlay onto a page image. Default drop-down options are: Additional selections may appear when custom Rubber-Stamps are defined and you have permission to use them.
Line	Insert a drawn line as an overlay onto a page image.
Arrow	Insert a line with an arrow as an overlay onto a page image.
Freehand Line	Insert a freehand drawn line as an overlay onto a page image.
Rectangle	Insert a rectangle as an overlay onto a page image.
Ellipse	Insert an Ellipse as an overlay onto a page image.
Text	Insert a text box where you may enter text that displays on a page image.

Element	Top Toolbar Element Description
Foreground Color	Change the background color of the annotation box using the drop-down menu list.
Line Thickness	Change the thickness of the lines. Choose the desired thickness for the selected drawing object such as a line, arrow, rectangle, etc. using the drop-down menu control:
Request Index Update Target	Activates the iLink tool to pass information between screens to update defined target fields on DocuPhase pages.
'Open In' button	When an applicable Microsoft Office file is currently in the viewer such as a: Word, Excel, PowerPoint or Outlook document & permitted, an 'Open in" button appears in the viewer's top toolbar such as for a Word document in the following example. This allows the document to be edited in its host product and saved externally and/or returned to DocuPhase in edited form to replace the original item or when under Revision-Controls become the latest revised copy.

DOCUPHASE

Settings

The Settings function allows Users to choose general, printing, emailing and annotation options for documents within DocuPhase.

To view and modify settings, follow these steps:

1. Select **Settings**.
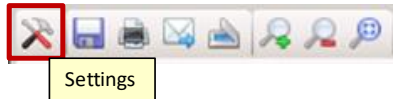
Settings

Note: The Settings dialog window displays, as shown below in step 2.

2. The **General tab** gives the user several option settings and controls:
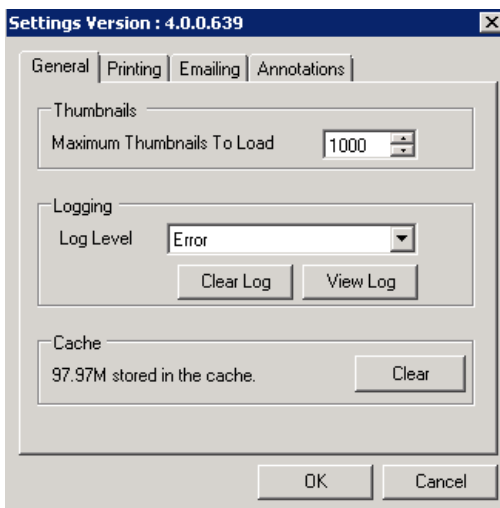
▪ **Thumbnails Panel --** Select the maximum number of thumbnail images to load for the viewer's thumbnail views plus logging and image cache options.
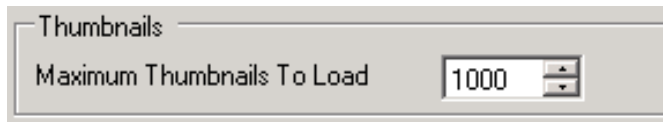
▪ **Logging Panel --** The user can adjust the amount of logging that should occur while viewing documents within the DocuPhase client viewer.
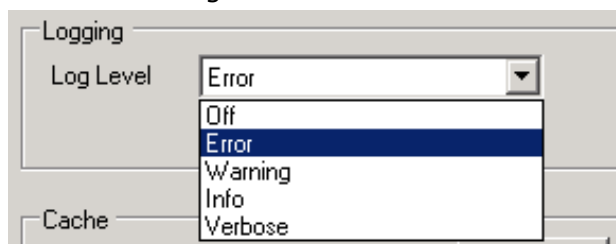
- There are five (5) log-level options:
  - Off – Suppress all activity logging
  - Error – Log Errors
  - Warning – Log Warnings & Errors
  - Info – Log Info activity, Warnings & Errors
  - Verbose – Log all activity

- Clear Log – Allows the current log information to be removed
- View Log – Allows the Current log information to be viewed
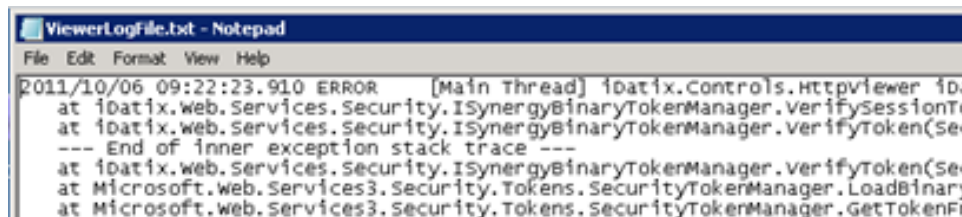
- **Cache Panel --** Cache storage can be cleared using the Clear button to manually force a refresh of cache to resolve a "Document cannot be loaded" error or a concurrently changed UDL set of values needs to be retrieved into cache condition.
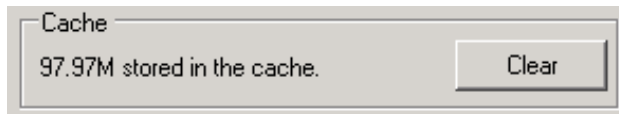
3. **Printing Tab:**
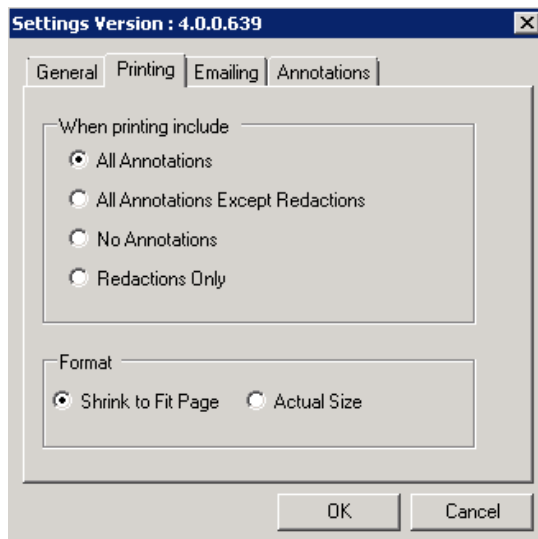
- **When printing include Panel --** Select the types of annotations to include when printing, as defaults.
- **Format Panel --** Select the default format to use when printing: Shrink to Fit Page or Actual Size.

4. **Emailing Tab:**
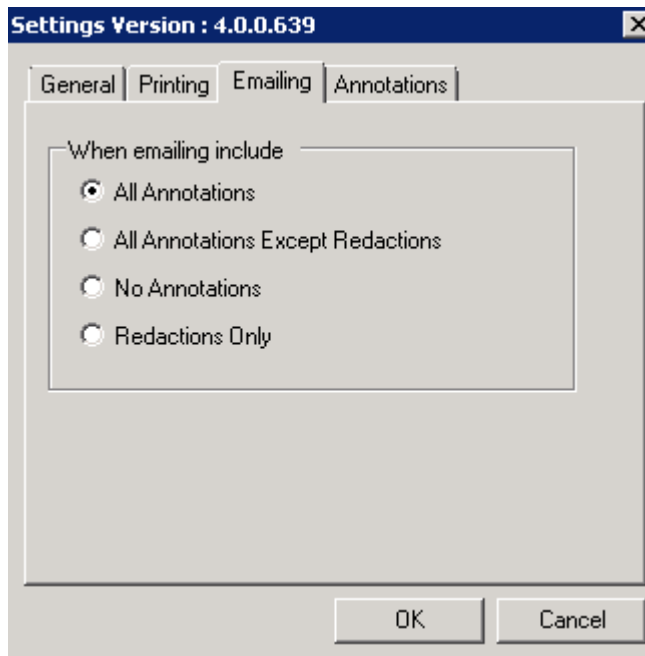
- **When emailing include Panel --** Select the types of annotations to include attaching a document with an email, as defaults.

5. **Annotations Tab:**
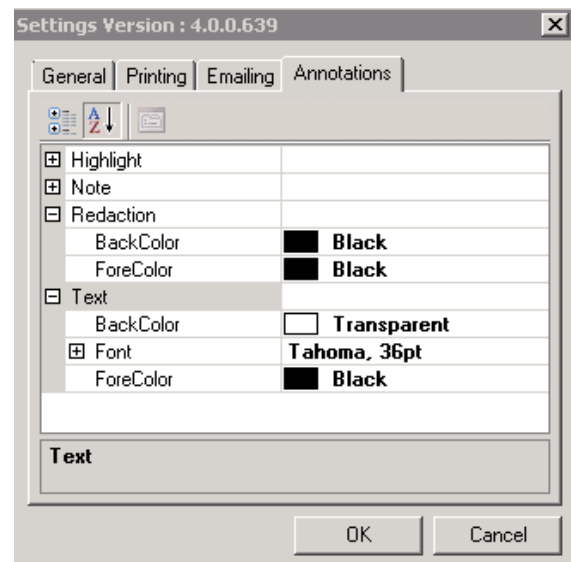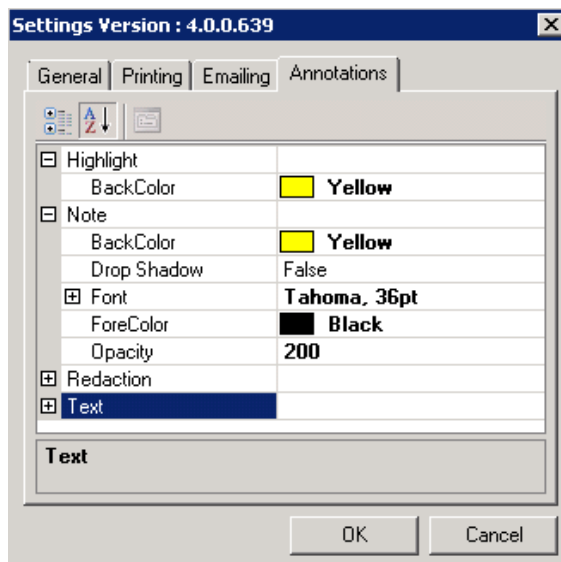
The Annotation Types are listed in the examples above.

- The plus-sign buttons can be used to expand the list to view and edit the default settings for each Annotation Type. Similarly, clicking the minus-sign buttons are used to collapse an expanded structure.

- The Annotation Types are expanded revealing their current settings in the above examples. You may reset the default settings for each Annotation Type to select the desired choice using the drop-down list, as illustrated below.
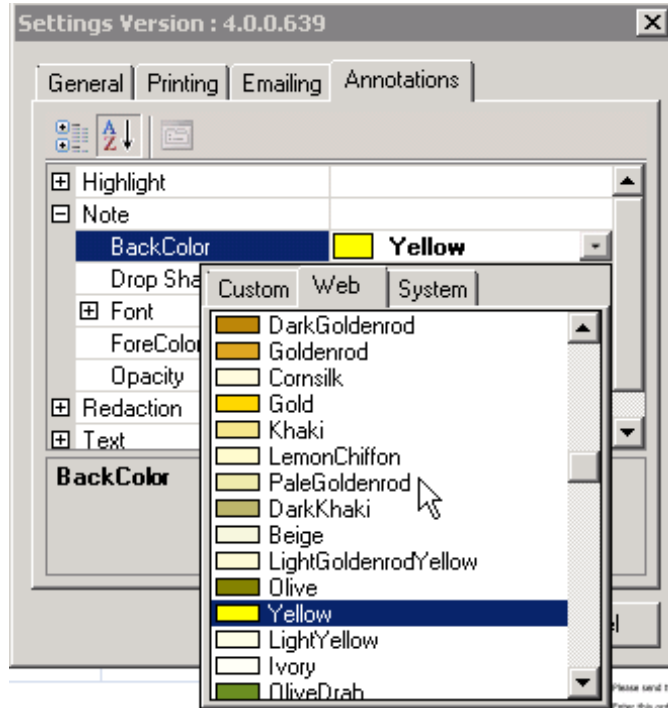
Individual User Preferences for the size and resolution of Annotation-Text and Full-Text information can be established, as shown setting 200 DPI (Dots-per-Inch) below.
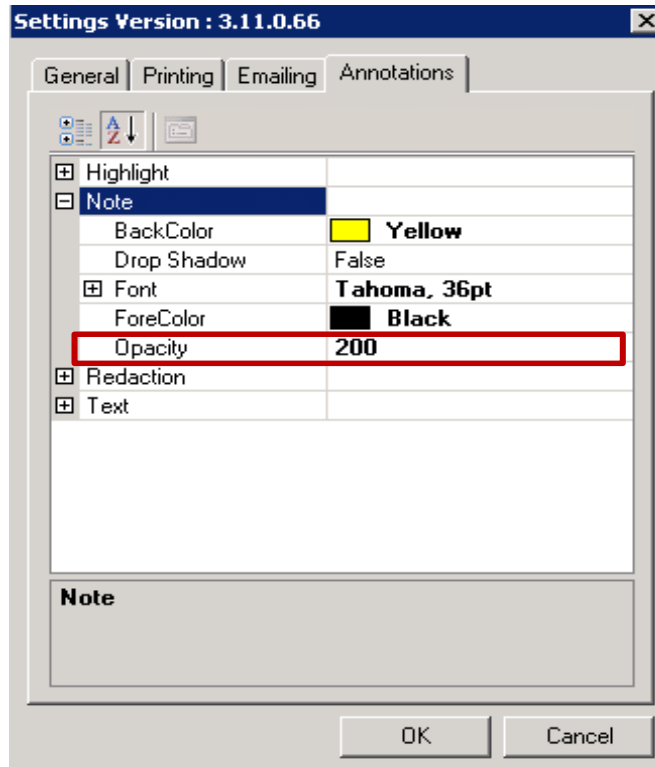
This DPI Awareness provides a consistent rendering of Annotations and Full-Text information for each user according to their established preferences.

Save a Copy

The Save a Copy tool allows Users to save an electronic copy of a Document from within DocuPhase to a user-specified location on a workstation or network.

To save a copy of a Document, follow these steps:
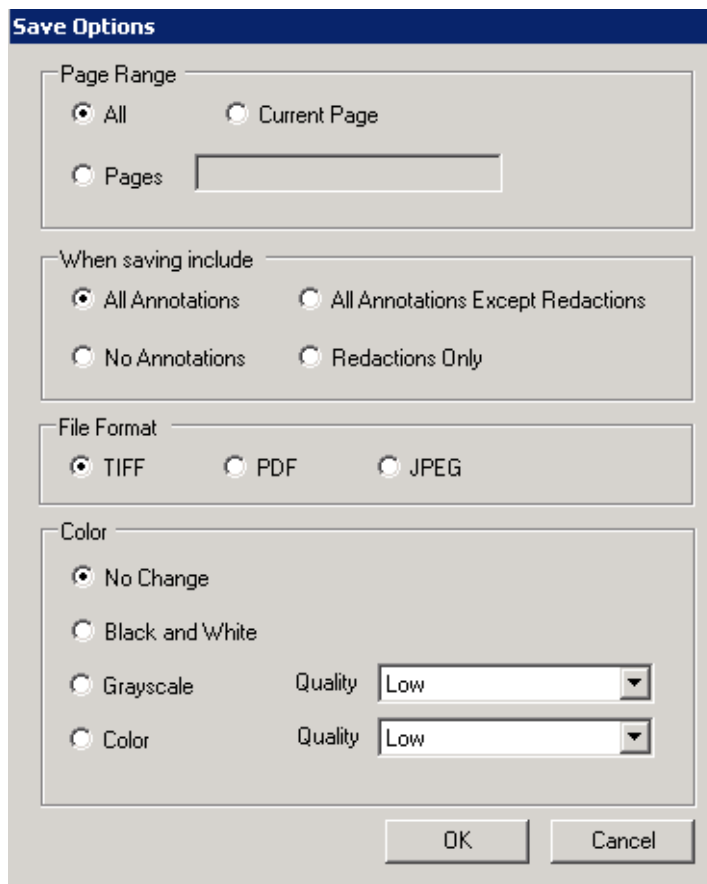
1. Select **Save a Copy**.
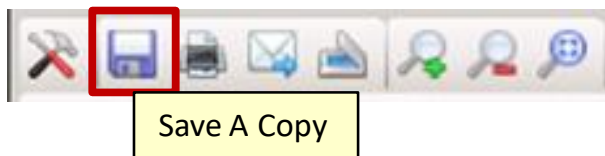
Note: This will activate the Save Options dialog window.

2. Select the desired Page Range and saving inclusion options, and page format settings in the Save Options dialog window.

3. Click **OK**.

4. Browse to the desired location to save the file, type a name for the file in the File Name filed, and then click **Save**.

5. A copy of the Document is saved to the specified directory.

Print

The Print function allows Users to print a hard copy of Document(s) from within the DocuPhase application.

To print a Document, follow these steps:

1. Select Print
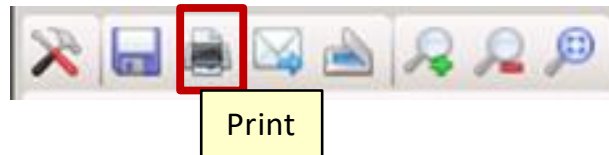
Print

> *Note: The Print dialog window displays.*

2. Select the desired printer and other print options
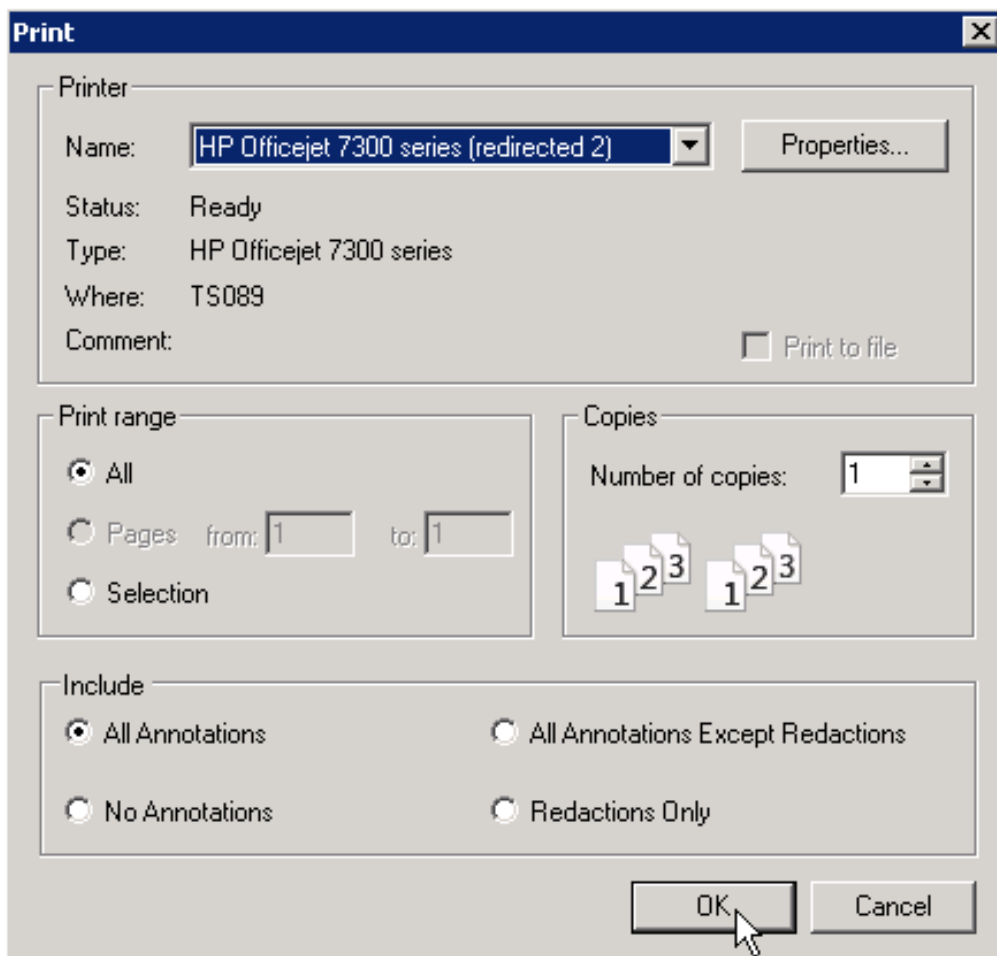
3. Click **OK**

Email
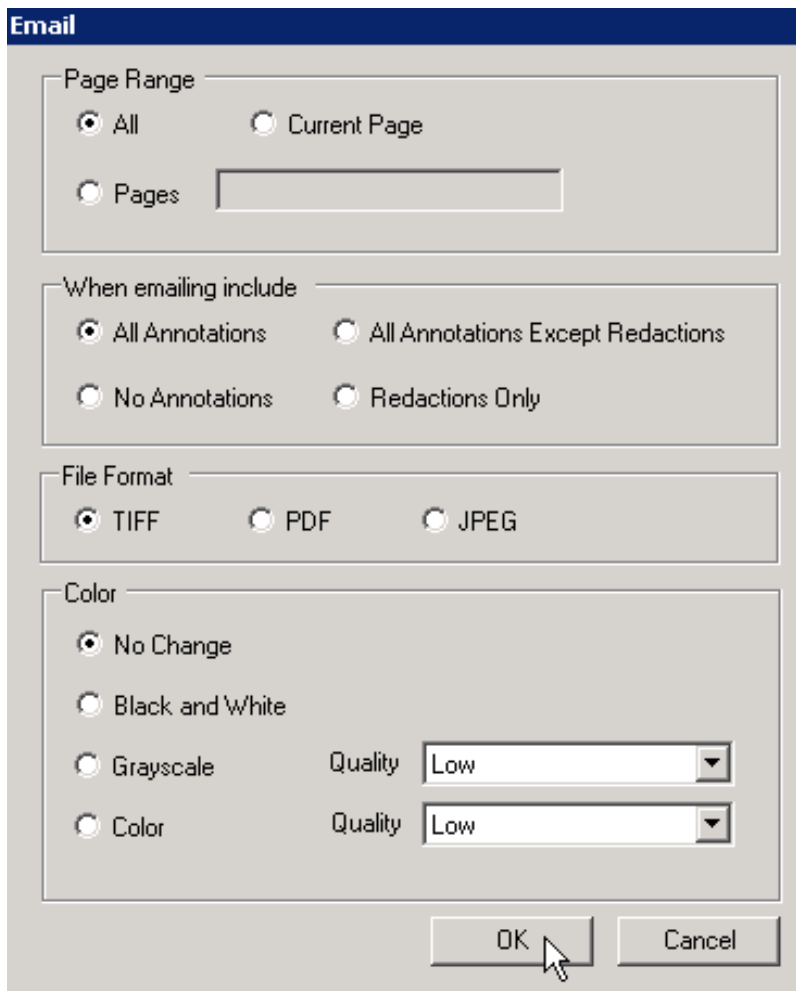
The Email function allows Users to send an electronic version of Document(s) from within the DocuPhase application to a recipient via email.

To email a Document, follow these steps:

1. Select **Email**.
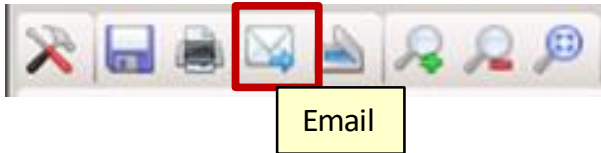
2. Select the desired Page Range and emailing inclusion options in the Email pop-up box.

3. Click **OK**.

4. Enter the recipient email address in the **To** field. The **Subject** line may be changed and additional text entered in the message area.
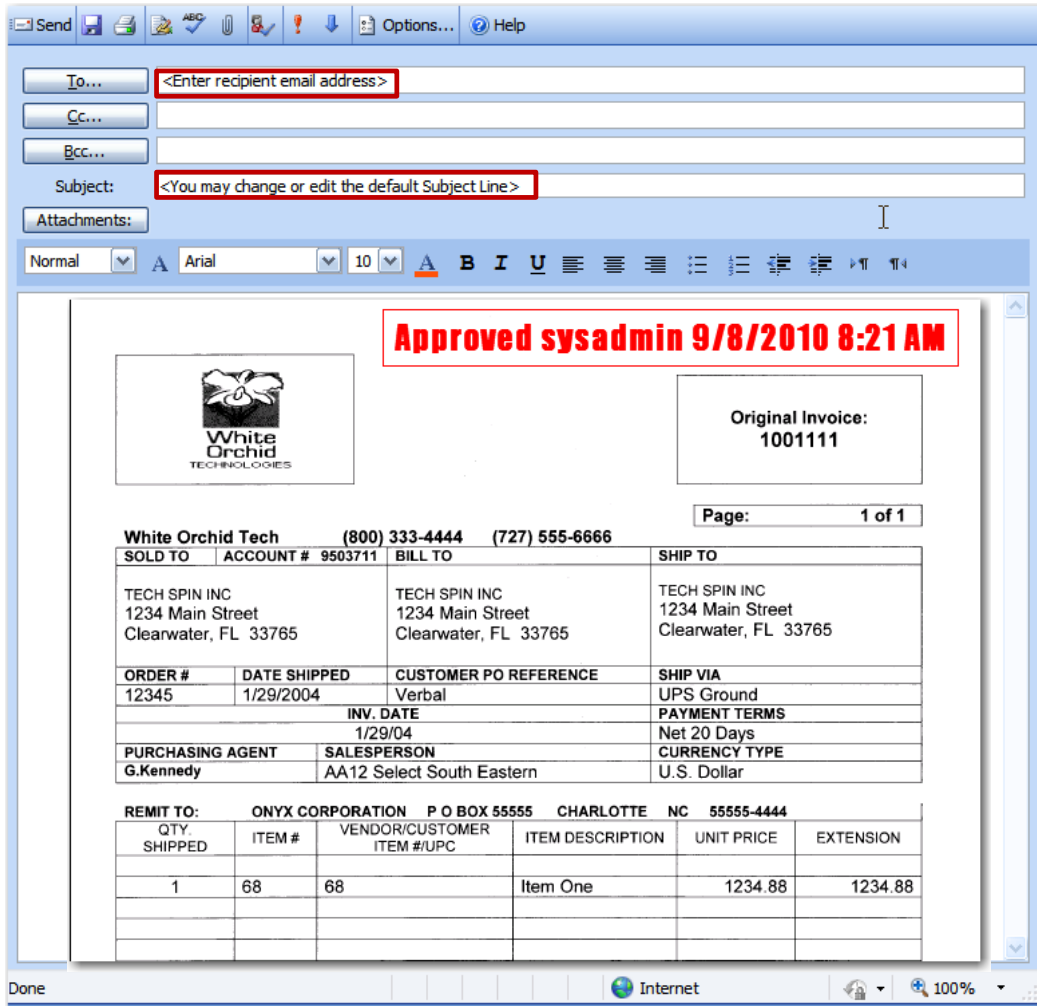
5. Click **Send** when the message is complete. This will email the Document(s).

Scan

Clicking the Scan Icon Initiates the Scan component of DocuPhase per the appropriate license you have been assigned. This option is used to append additional image pages to the document currently in the DocuPhase Document Viewer Pane as well as for other document capture purposes.
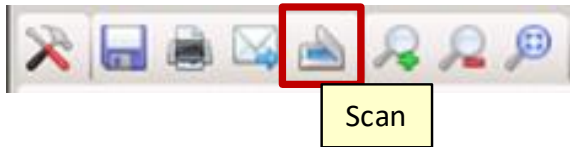
Note: This Scan option is granted with the "Scan Image" user and application-operations functionality permission.

The following illustration shows how the ScanDox document scanning component of DocuPhase can be launched using the Scan icon in the Top Toolbar on the Document Viewer Pane as well as from a Desktop icon or from a Microsoft Office product.
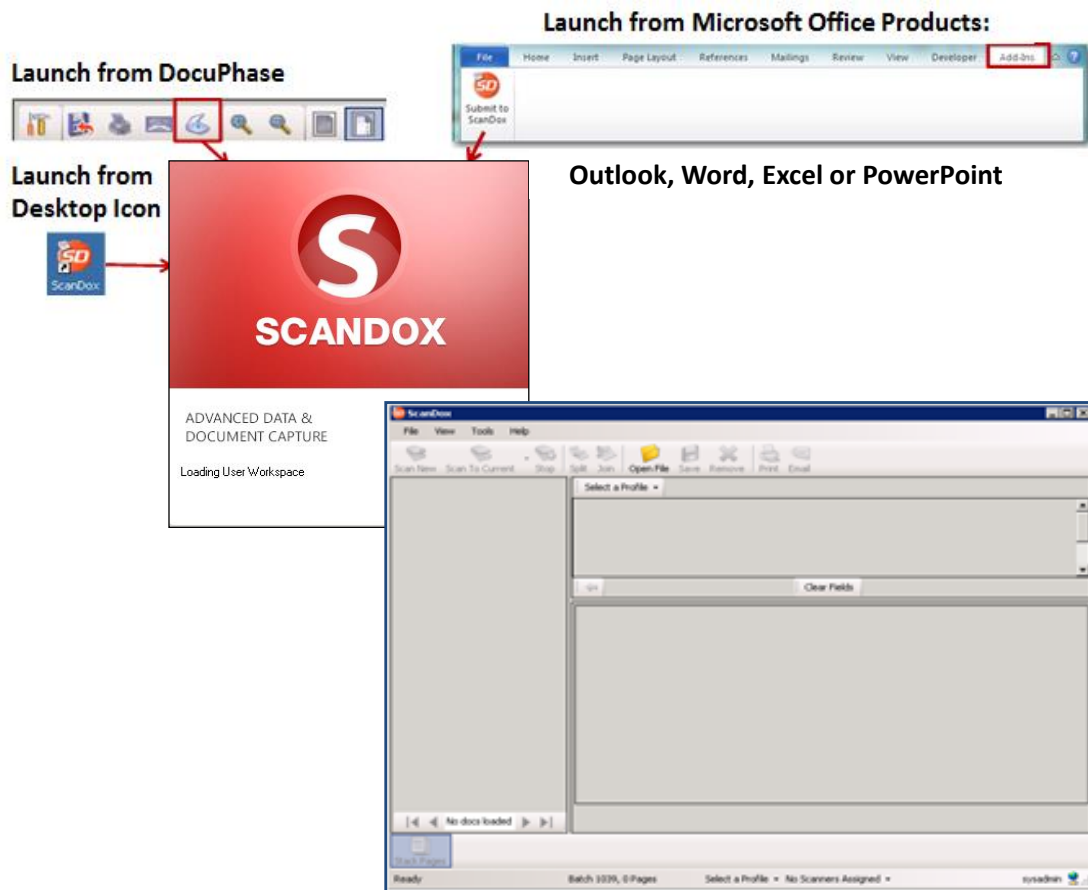
Image Controls

Zoom In

The Zoom In function provides a larger and closer view of the displayed Document page image.

> *Note: The magnification setting is temporary once the currently displayed page is exited -- the document view pane display returns to the original default magnification setting.*

To Zoom In, follow these steps:

1. With a document page displayed in the Document Viewer Pane, click the Zoom In icon on the top toolbar to magnify the displayed image.

2. Additional clicks of the Zoom In icon will increase the amount of magnification.

3. Use of the Pan tool allows you to navigate to the desired viewing area of the magnified image should it have move beyond view in the Document Viewer Pane. Likewise, the horizontal and vertical scroll bars on the viewer can also be used to navigate to the desired viewing area.

Zoom Out

The Zoom Out function is used to obtain a broader view of the displayed Document page image.

> *Note: The magnification setting is temporary once the currently displayed page is exited -- the document view pane display returns to the original default magnification setting.*

To Zoom Out, follow these steps:

1. With a document page displayed in the Document Viewer Pane, click the Zoom Out icon on the top toolbar to reduce the displayed image's magnification.
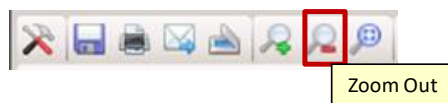
1. Additional clicks of the Zoom Out icon will decrease the amount of magnification until the page image is thumbnail size.

2. Use of the Pan tool (🖐) allows you to navigate to the desired viewing area of the magnified image should it have move beyond view in the Document Viewer Pane. Likewise, the horizontal and vertical scroll bars on the viewer can also be used to navigate to the desired viewing area.

Zoom to Region

The Zoom to Region function is used to select a rectangular area on the displayed page image to magnify using the crossbar-cursor tooltip.

- The crossbar-cursor tooltip remains available for subsequent region selections, but it may be replaced by the panning-cursor tooltip when the Pan icon (✋) is selected.
- The magnification and position of the selected region is retained for other image pages for the same or different documents until a Zoom In, Zoom Out, Best Fit or Fit to Width operation is performed to clear the region setting.

To Zoom to Region, follow these steps:

1. With a document page displayed in the Document Viewer Pane, click the Zoom to Region icon on the top toolbar to magnify the displayed image.

2. A crossbar-cursor tooltip is displayed when the cursor is in the Document Viewing Pane. The crossbar-cursor can be used to select a rectangular area on the image for magnification by left-clicking and dragging the cursor with the mouse.

3. As you navigate to different pages and documents, the previously selected region is displayed with the same magnification.

- The crossbar-cursor tooltip remains displayed which allows you to optionally select a new region for viewing and magnification.
- Use of the Pan tool (✋) allows you to navigate to the desired viewing area of the magnified image should it have move beyond view in the Document Viewer Pane. Selection of the Pan tool will replace the regional crossbar-cursor tooltip with the pan-cursor tooltip for selective image navigation.
- Likewise, the horizontal and vertical scroll bars on the viewer can also be used to navigate to the desired viewing area.
- Selection of Best Fit or Fit to Width icons will serve to override all current Zoom to Region settings.

Best Fit

The Best Fit function is used to expand or contract the image in the Document Viewer Pane allowing the entire image to display so that the full height and width of the document is visible.

To use the Best Fit function, follow these steps:

1. With a document page displayed in the Document Viewer Pane, click the Best Fit icon on the top toolbar to insure that both the top and sides of the document are fully visible.

2. Both the Before and After image is shown below of the Viewer Pane once the Best Fit icon is selected.
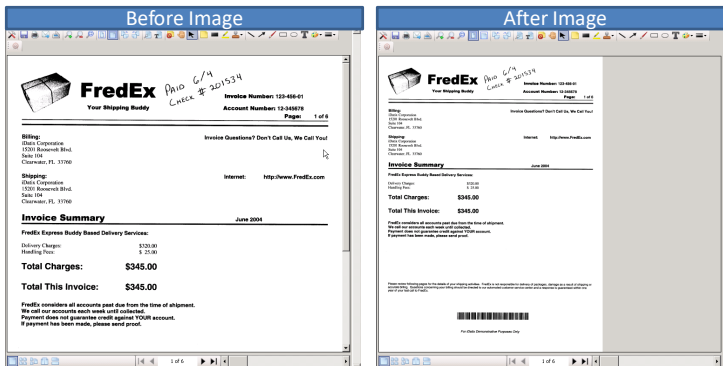
## Fit to Width

The Fit to Width function is used to expand or contract the image in the Document Viewer pane allowing the entire width of the Document image to display.

To use the Fit to Width function, follow these steps:

1. With a document page displayed in the Document Viewer Pane, click the Fit to Width icon on the top toolbar to ensure that the full width of the document is visible in the viewer.
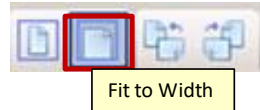
2. Both the Before and After image is shown below of the Viewer Pane once the Fit to Width icon is selected.
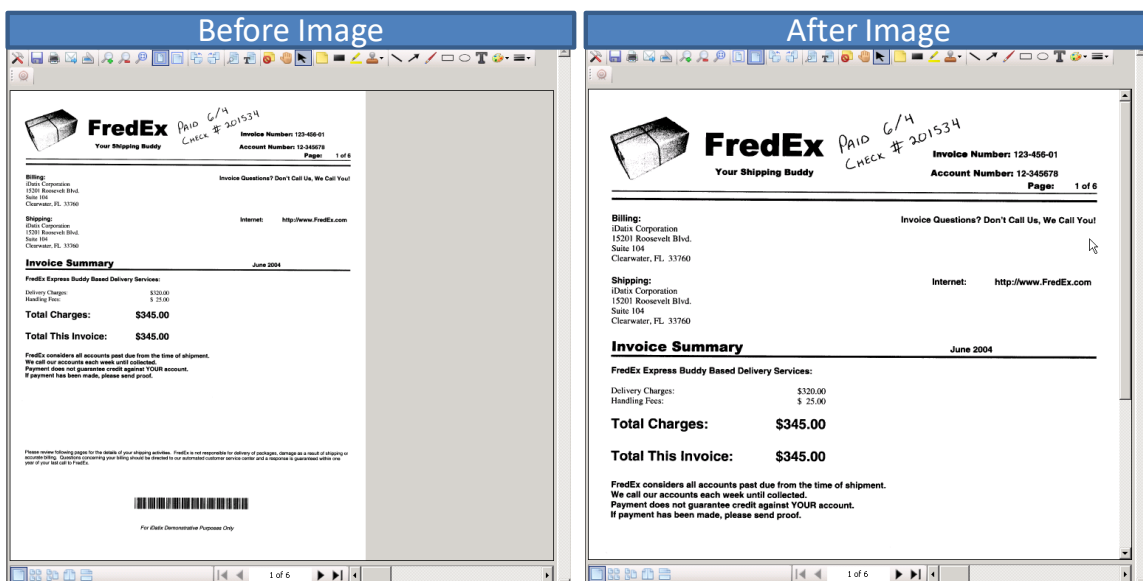
Rotate Image

The Rotate functions allow you to rotate the image 90-degrees to the left or right direction. A second rotation operation in the same direction can be used to complete a 180-degree rotation (i.e., flip the page image vertically).

Rotate Left: To use the Rotate Left function, follow these steps:
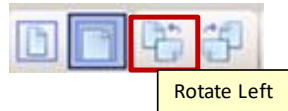
Rotate Left

1. To rotate the document page image displayed in the Document Viewer Pane, click the Rotate Left icon on the top toolbar to turn the image 90-degrees towards the left. Successive Rotate Left operations will advance the rotation by 90-degrees to the left.

2. With the thumbnails display option set (as shown below), select one or more of the thumbnails of page images that you wish to Rotate Left in one operation.

   ▪ Click a thumbnail to select the first or only image to rotate.
   ▪ To select additional thumbnails, hold the Ctrl-key as you make additional selections. Alternatively to make multiple adjacent thumbnail selections at one time, hold the Shift-key and click on the last thumbnail to select all between the first and the last selection.

The Document Viewer Pane in Thumbnail Display Mode is shown below with three (3) selections.

Rotate Left & Right

Icons
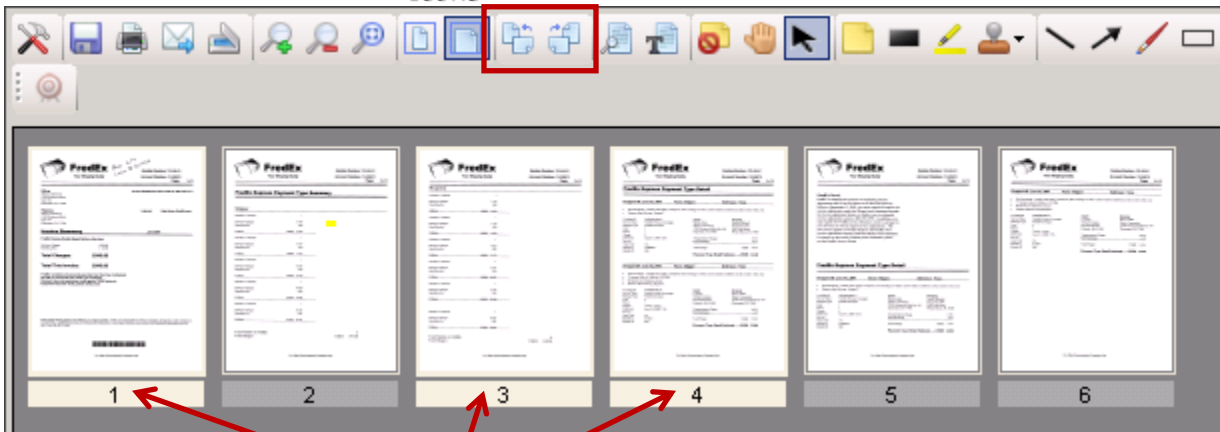
Thumbnail View

Mode Icon

Multiple

Selections 1, 3 & 4

Rotate Right: To use the Rotate Right function, follow these steps:

Rotate Right

1. To rotate the document page image displayed in the Document Viewer Pane, click the Rotate Right icon on the top toolbar to turn the image 90-degrees towards the right. Successive Rotate Right operations will advance the rotation by 90-degrees to the right.

2. With the thumbnails display option set (as shown below), select one or more of the thumbnails of page images that you wish to Rotate Right in one operation.

    ▪ Click a thumbnail to select the first or only image to rotate.

    ▪ To select additional thumbnails, hold the Ctrl-key as you make additional selections. Alternatively to make multiple adjacent thumbnail selections at one time, hold the Shift-key and click on the last thumbnail to select all between the first and the last selection.

The Document Viewer pane in Thumbnail Display Mode is shown below with three (3) selections.

Rotate Left & Right

Icons
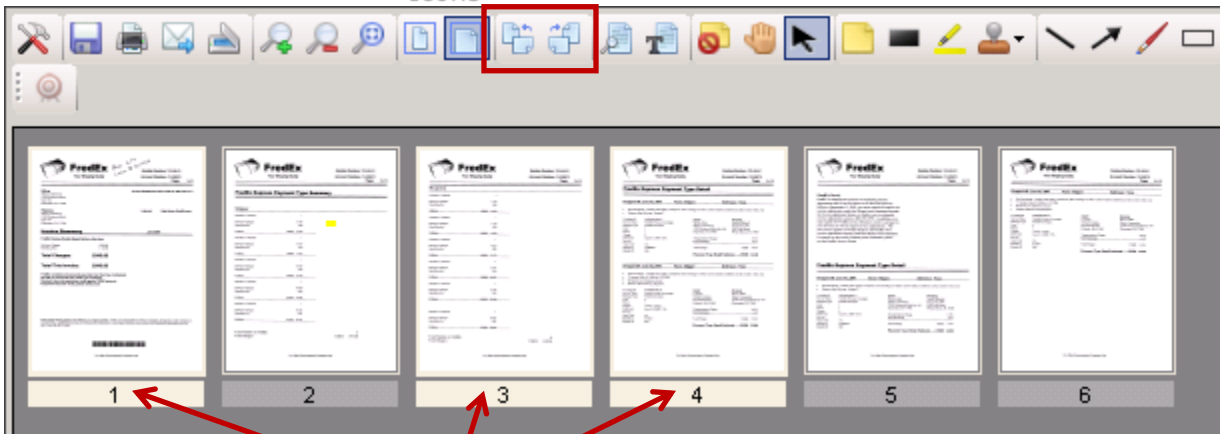
Thumbnail View

Mode Icon

Multiple
Selections 1, 3 & 4

Full-Text Image Content

The Find and Show Text functions utilize full-text data that is obtained from the current document-page image to identify where a specified word or phrase appears on the page image as well as extract the full text obtained by OCR from the Document into a window for viewing.

Optionally, you may place this extracted text in your Windows Clipboard.

The Full-Text Find and Show Text icon appear together on the Document Viewer Pane's Top Toolbar.

> *Note: DPI Awareness -- Full Text and Annotation data are DPI (dots per inch resolution) aware. This provides a consistent size for end-user viewing of text and annotation data based on each end-user's preference settings. Previously annotations and full-text defaulted to 300 dpi.*

Find

You may search the Document's image content for a specified text word or phrase using Full-Text content that is obtained by Optical Character Recognition (OCR) technology.

To use the Find function, follow these steps:

1. With a document displayed in the Document Viewer Pane, click the Find icon on the top toolbar.

2. A popup dialog box appears for you to enter the word or phrase you wish to locate within the currently displayed document, as shown below. For example, search for the word "total".
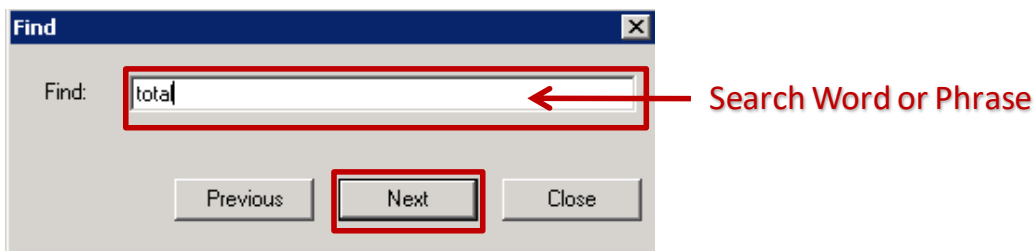
3. Selecting the Next Button, advances to the first instance of the word "total" and highlights it. Upper or lower case spelling of the word is ignored and matching is done on the specified pattern so that both "total" and "totals" will match.

Invoice Summary

FredEx Express Buddy Based Delivery Services:

Delivery Charges:	$320.00
Handling Fees:	$ 25.00

Total Charges: **$345.00**

Total This Invoice: **$345.00**

FredEx considers all accounts past due from the time of shipment.
We call our accounts each week until collected.
Payment does not guarantee credit against YOUR account.
If payment has been made, please send proof.

As shown (above) in the Viewer Pane, the first match is highlighted on the image.

4. By clicking the Next button again, advances the match to the next occurrence of the search pattern on the same page or other pages in the document being viewed, as shown below.

Invoice Summary

FredEx Express Buddy Based Delivery Services:

Delivery Charges:	$320.00
Handling Fees:	$ 25.00

Total Charges: **$345.00**

Total This Invoice: **$345.00**

FredEx considers all accounts past due from the time of shipment.
We call our accounts each week until collected.
Payment does not guarantee credit against YOUR account.
If payment has been made, please send proof.

Likewise, selection of the Previous button reverses the search to the prior match.

5. To terminate the Find operation, select the Close button.

Note: While the Find is in progress, it controls the paging and display of the document.

Show Text

Using the Show Text function, the Full-Text content obtained by Optical Character Recognition (OCR) technology from all pages of the document is extracted so it may be viewed in a separate window from the Document Viewer pane.

To use the Show Text function, follow these steps:

1. With a document displayed in the Document Viewer pane, click the Show Text icon on the top toolbar.
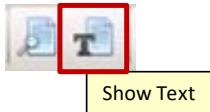
2. The Full-Text Window is displayed with the full-text content from the documents image pages, as shown below.
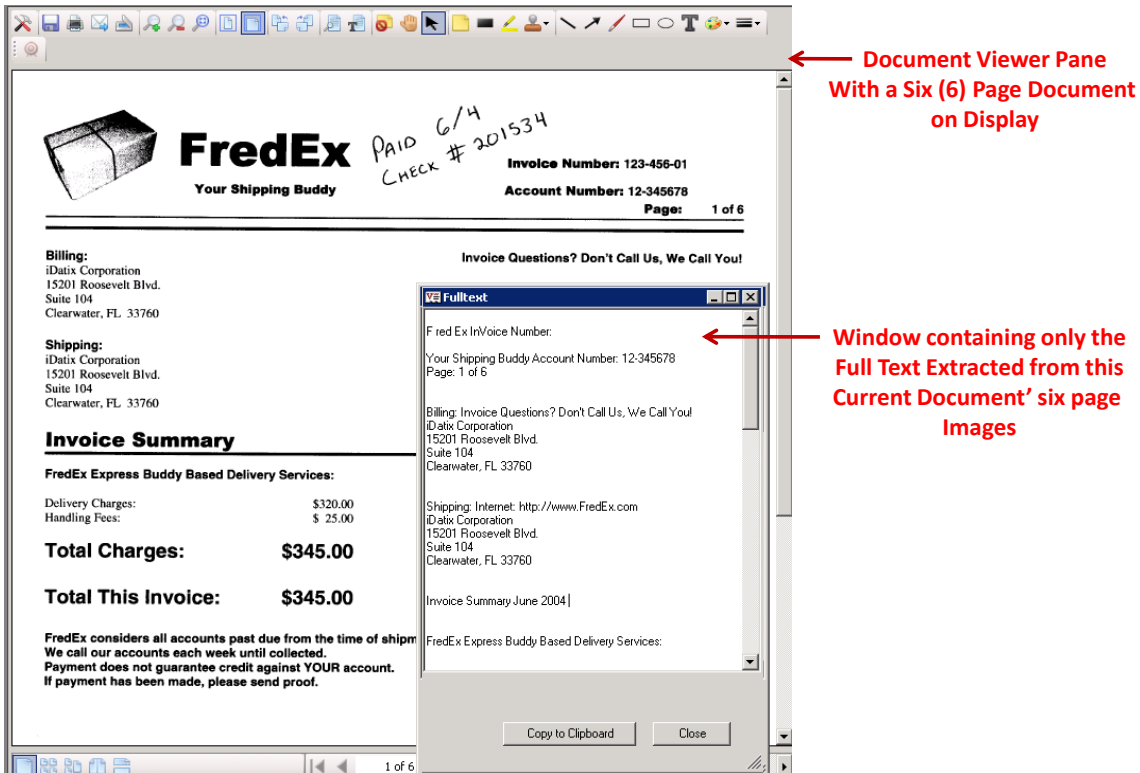
3. You may optionally, save the extracted text content to the Clipboard on your workstation by clicking the Copy to Clipboard button. Once the text is on your clipboard you may Paste it into other application programs.

4. Select the Close button to discard the extracted text content and close the Full-Text window.

Pan

The Pan function (✋) works in conjunction with the viewer-display as well as with the zoom features, allowing you to shift and reposition the page-image in the Document Viewer Pane to better view the information on a particular area of the image.

To magnify and pan on a Document page image, follow these steps:

1. Click the Zoom In option to magnify the Document.
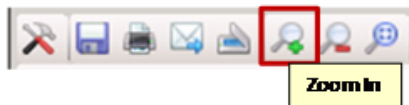
2. Select the Pan option.

3. If the Zoom to Region crossbar-tooltip was previously active, selection of the pan option replaced it with the pan-hand tooltip (✋) allowing the image to be moved horizontally and vertically in the Document Viewer Pane.

4. Left-click and hold the mouse button to grab and move the page.

    Note: The zoom-in tool may also be selected to accomplish this goal using the panning-hand cursor tooltip feature (✋).

Annotations

Annotations provide additional information and emphasis as an overlay to a Document's image pages. It allows you to add notes, emphasis and manage the annotation objects which have been applied.

> *Note: Annotations are maintained separately as a separate layer to avoid permanently altering the original document's image and allowing the annotations to be further manipulated with the appropriate permissions.*
>
> *However, export and output options for annotated documents can be used to permanently fuse annotations (e.g., Redactions, Note, Highlights) in the output document copy.*

The Annotations icons appear in this part of the Document Viewer pane's Top Toolbar.

The following types of annotations functions can be applied to a document page image:

- **Note Annotations** – Add comments and emphasis
- **Redactions** – Obscure areas of an image from view
- **Highlights** – Add emphasis to selected areas using a see-through color overlay
- **Rubber Stamps** – Overlay a pre-defined stamp-image with current information such as "Approved" and relevant information such as when and/or by whom.
- **Ability to Hide & Restore –** Make annotations invisible or visible.

Note: DPI Awareness -- Full Text and Annotation data are DPI (dots per inch resolution) aware. This provides a consistent size for end-user viewing of text and annotation data based on each end-user's preference settings. Previously annotations and full-text defaulted to 300 dpi.

Note Annotation

The following types of Annotation operations are supported:

- Insert Note Annotations
- Select an Annotation
- Hide Annotations
- Remove or Manipulate Annotations

To insert an Annotation, follow these steps:

1. Click the Note Annotations icon.
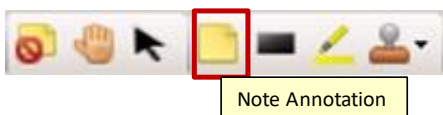
2. Drag-select on the document to denote an area where you would like to apply an annotation.

3. Release the mouse.

4. Enter text into the annotation box

5. Click outside of the annotation.

To Select an Annotation to manipulate, follow these steps:

1. Click the Select Annotation icon and the crossed-arrows tooltip appears indicating that the selected annotation can be moved in any direction once the object is selected.
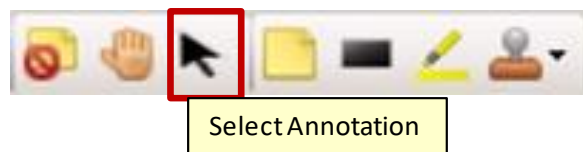
2. Continue selecting annotations such as: highlights, note-annotations, rubber-stamps and redaction annotations and moving them to desired positions on displayed images in the viewer Pane.

3. The crossed-arrows annotation-move tooltip will remain active as you navigate to other pages in the same document. However, once you select and display a new document, the Select Annotations feature is cancelled.

To Hide all Annotations, follow these steps:

1. Click the Hide Annotations icon to make all highlight, note annotations, rubber stamp and redaction annotations disappear from display in the viewer pane. Only the original document image is visible.
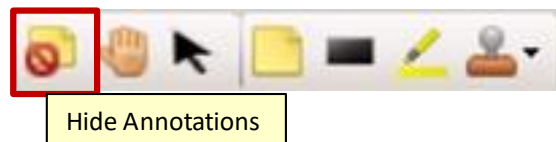
2. Click the same icon again to make all highlight, note, rubber stamp and redaction annotations re-appear in the viewer pane. The original document image with overlay annotations appears.

To Remove or Manipulate any Annotation, follow these steps:

1. Click the Select An Annotation icon
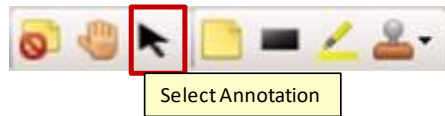
2. Select the Annotation object to be manipulated using the left-mouse button.

3. The selected annotation can be deleted by pressing the Delete-key or the Ctrl-x keys.
   Likewise, a list of manipulations (including "Cut" to remove it) for the selected annotation object can be displayed by clicking the right-mouse button to produce a drop-down menu, as shown below.
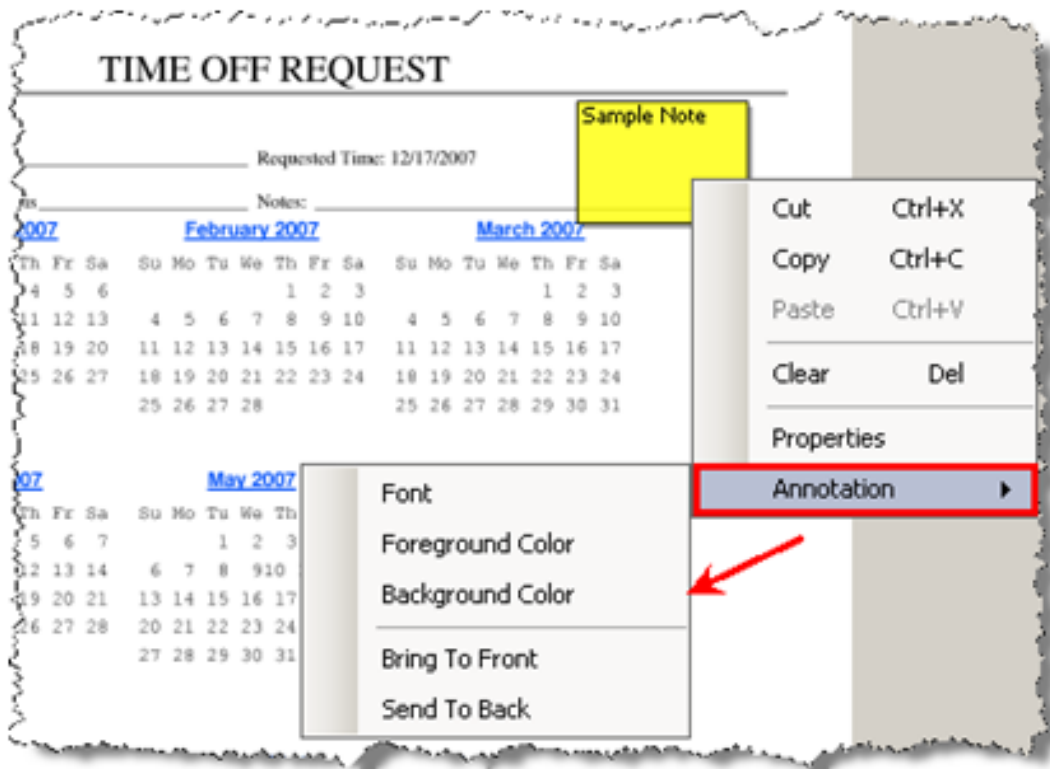
4. Click the appropriate drop-down menu option to complete the desired operation on the selected Annotation object.

   Note: In the child menu, options exist for making changes to the font, foreground and background color, as well as moving the annotation front or back. From the parent drop-down menu, the user may also cut, copy, and clear the Annotation.

   If you select Text or Background Color from the submenu, the palette displays.

Redactions

Redactions provide the ability to conceal sensitive information on a Document.

To insert a redaction, follow these steps:

1. Click the **Redaction** icon.

Redaction

2. Drag-select over the information you wish to conceal.

3. Release the mouse.

Note: Redaction objects (i.e., that have not been fused into the image) can be removed or manipulated using the same method described above for Annotation objects with the appropriate permissions.

Highlights

The Insert Highlight function enables Users to emphasize important information in a Document by drag-selecting an area to appear in a highlighted box.

To insert a highlighted region, follow these steps:

1. Select Insert Highlight.

Highlight

2. Left-click the mouse and drag a box over the area you wish to have highlighted.

3. The color of the Highlight can be modified, by following the same procedure applied to editing an Annotation.

    Note: Highlight objects can be removed or manipulated using the same method described above for Annotation objects with the appropriate permissions.

Rubber Stamp

The Rubber Stamp function gives users, that are granted the ability, the means to indicate approval, denial, or other endorsements onto a Document's page image(s) by affixing a digital "rubber stamp" impression. The use and modification of rubber stamps is permission based.

To apply a rubber stamp to a Document page image, follow these steps:

1. Select the **Rubber Stamp** icon.

- By default, there are three stamps to choose from: Denied, Received, or Approved.
- In addition, new Rubber-Stamp types can be created by a DocuPhase Administrator to provide other stamp topics such as: "Paid", "Final", "Closed", etc. to meet your specific organizations needs using the Administration Menu entry for Rubber Stamps.

2. Rubber Stamps, like other Annotation objects, are maintained as an independent overlay to the document page image and do not alter the original document image. Select a Rubber Stamp from the list.
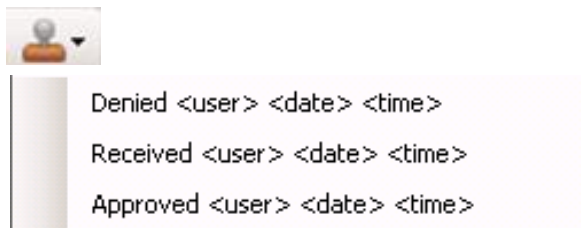
Each rubber stamp object can be defined to have additional text information supplied within the stamp image that is applied. Notice the default stamps, shown above, will provide current information at the time the stamp is applied indicating the:

- The User's ID that applied the stamp (e.g., <user>)
- The user's name as it is defined for the DocuPhase User ID (e.g., <name>)
- The Date the stamp was applied (e.g., <date>)
- The Time the stamp was applied (e.g., <time>)

3. Drop the Rubber Stamp annotation-image on the Document by clicking the left-mouse button above the location on the page image where you wish to place it.

   Note: Right-click on the rubber stamp to cut, copy, or delete it.

Hide Annotations

The Hide Annotations function allows users to view an annotated Document without the annotations displayed. Selecting the Hide Annotations tool masks all annotations from view, but does not remove the annotations from the Document.

To hide annotations, follow these steps:

1. Select Hide Annotations.

Hide Annotations

2. Once the Hide Annotations icon is selected, annotations are no longer displayed on the Document images.

To restore annotations to view after they have been hidden, follow these steps:

1. Select Hide Annotations icon to reverse the previous hide-annotation operation.

2. Once the icon has been selected to reverse the process, the annotations overlay re-appears with all of the annotations visible in the Document Viewer Pane.

Drawing Tools

A set of useful drawing tools are provided as additional types of annotations that overlay document page images plus two of the drawing controls allow you to alter the colors and line sizes by selecting from their drop-down lists.

The following table explains each of the drawing tools and the two drawing controls.

Element	Description
Line	Insert a straight line.
Arrow	Insert a line with an arrow
Freehand Line	Insert a freehand drawn line.

Element	Description
Rectangle ▢	Insert a rectangle
Ellipse ⬯	Insert an Ellipse
Text **T**	Insert a text box where you may enter text that displays on a page image.
Foreground Color 🎨▾	Change the background color of the annotation box using the drop-down menu list. 🎨▾ ■ Black □ White ■ Green ■ Red ■ Yellow ■ Cyan ■ Blue ■ Magenta ■ Brown ■ Orange 🎨 Custom…
Line Thickness ≡▾	Change the thickness of the lines. Choose the desired thickness for the selected drawing object such as a line, arrow, rectangle, etc. using the drop-down menu control: ≡▾ — Extra Fine — Fine ▬ Medium ▬ Marker ▮ Thick Marker

Get Index Data from another Window

As a user is Indexing documents on the Indexing Page, information present on screens in another program's window can be automatically transferred to one or more Index fields on the Indexing Page (as previously configured with iLink for the application).

This allows the information to copy rapidly and accurately from another application such as QuickBooks to automatically fill one or more index fields in the "Target" Index page for the current document.
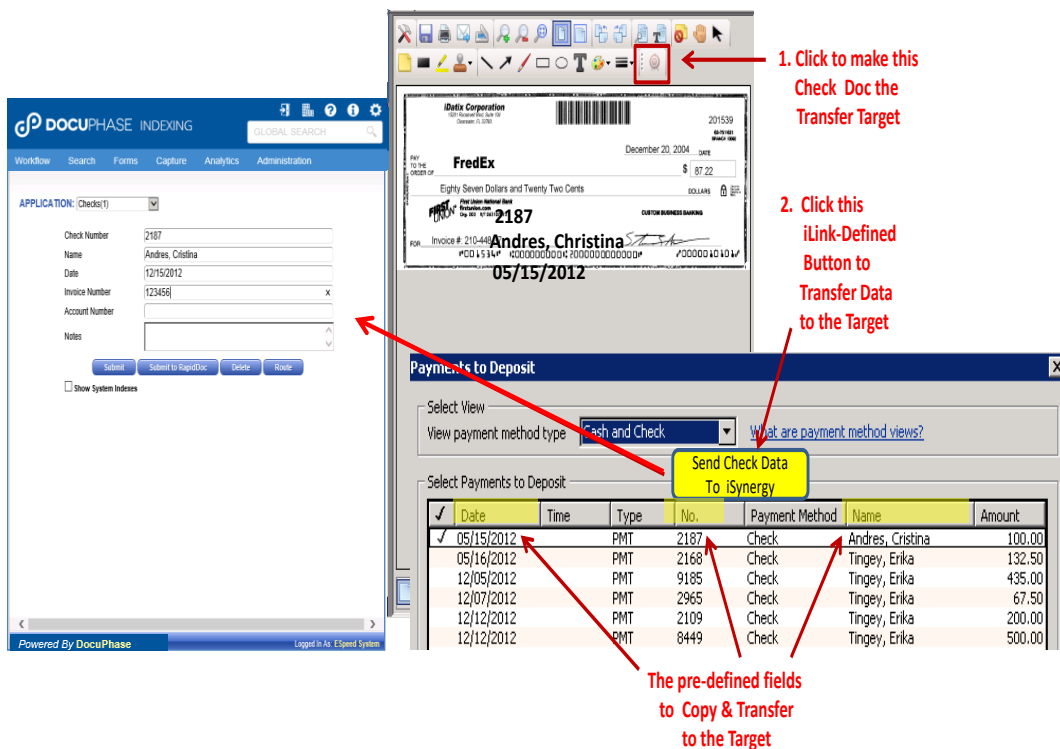
Before this operation can be done, the DocuPhase iLink product must be installed and configured for each Application and the index fields that will use this feature.

In addition, a suitable "Button" will be created using iLink that appears in the window for an application such as QuickBooks – When the button is clicked, the previously-defined data is copied from the QuickBooks and passed to the "Target" document being indexed on the Indexing Page.

The "Bulls-Eye" icon on the Top Toolbar is used to identify the "Target" document on the Indexing Page and then the remote button in QuickBooks can be clicked to transfer a copy of the data into the "Target's" indexing fields.

Request Index Update Target
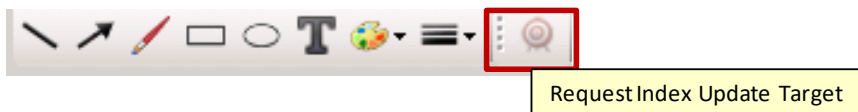
The following diagram illustrates this process:
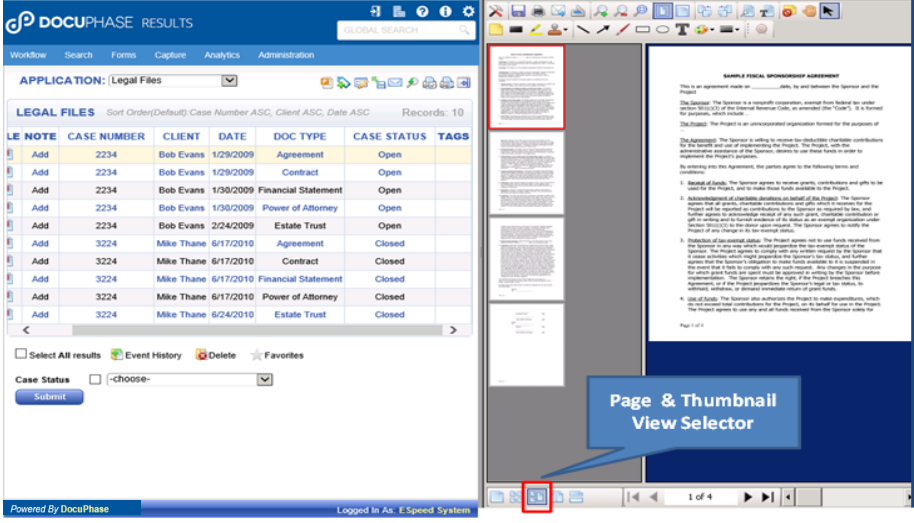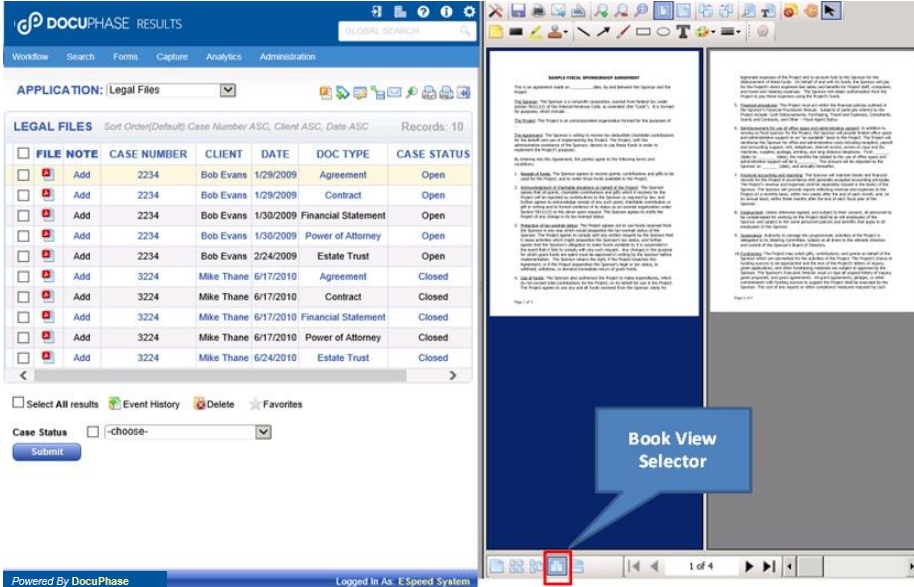

Bottom Toolbar

This bottom toolbar contains the thumbnail/book view and the page scroll and displays each time the Document Pane displays.
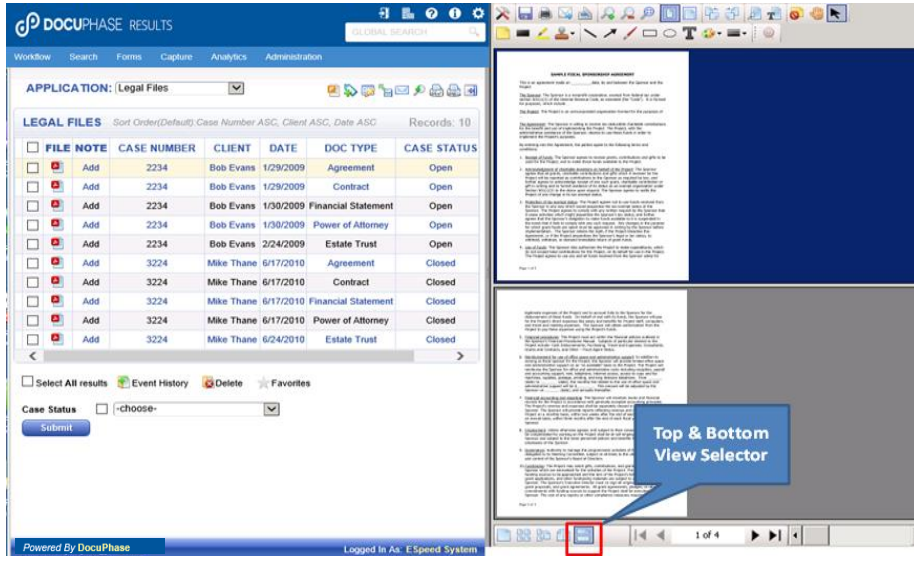

Element	Bottom Toolbar Element Description
First Page	Navigates to the first page.
Previous Page	Navigates to the previous page.
Next Page	Navigates to the next page.
Last Page	Navigates to the last page.
Page Counter	Identifies the current page in the Document. If a page number is entered in this region, the viewer will go to the page number entered.
Horizontal Scroll Bar	Allows scrolling across the Document Page image.
Vertical Scroll Bar	Allows scrolling through all pages of the Document.

| Element	Bottom Toolbar Element Description
One Page View Selector (Alt+1)	Sets the viewer to a single page view.
Thumbnail View Selector (Alt+2)	Sets the viewer to a thumbnail view.

Element	Bottom Toolbar Element Description
Thumbnail and Page View Selector (Alt+3) [icon]	Splits the viewer into a thumbnail preview pane and single page view pane with the thumbnail pane.
Book View Selector (Alt+4) [icon]	Allows for two pages to be displayed on the screen side by side like an open book.

Element	Bottom Toolbar Element Description
Top and Bottom View Selector (Alt+5)	Displays the upper and lower portions of the Document.

Image Viewer & Thumbnail Options

When the full-function DocuPhase Image Viewer displays a document with a View Selector activated in the Bottom Toolbar, as shown below, a Right-Click Menu displays option selections for:
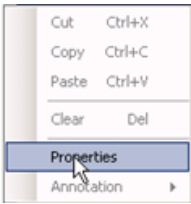
- Image Page Manipulations
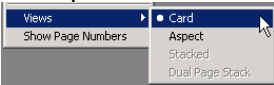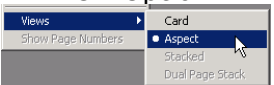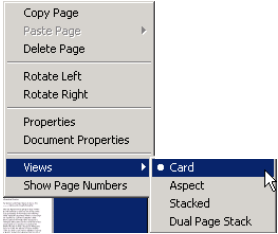- Thumbnail Views
- Show Page Numbers
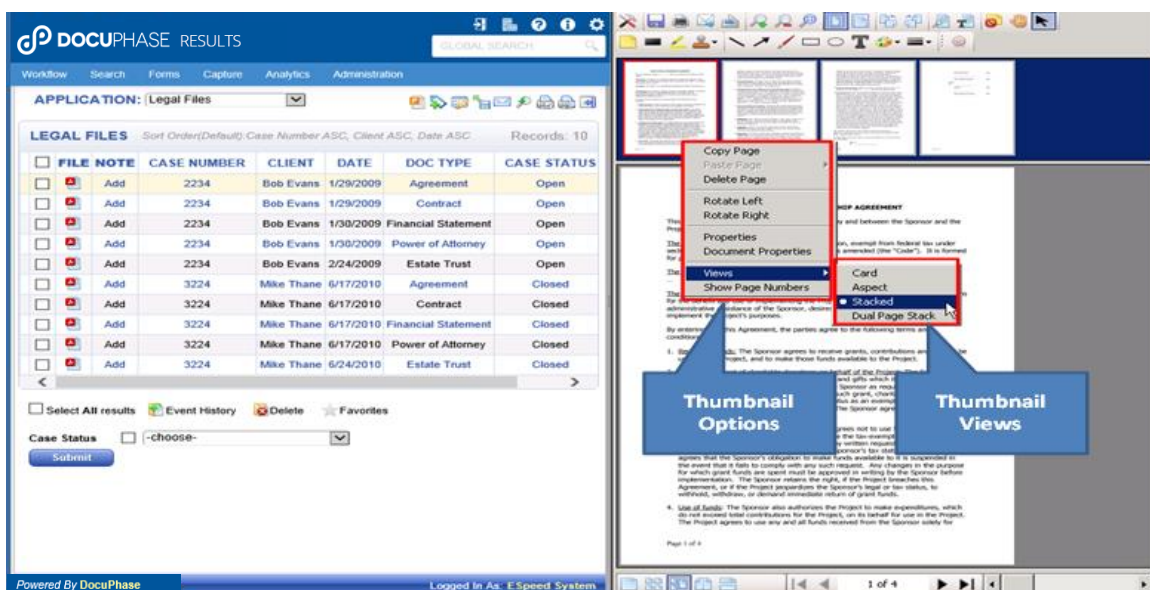
Depending on the Bottom Toolbar View Selector icon that is selected, different Right-Click Menu option are enabled and disabled. These Right-Click Menu options for the Thumbnail Pane and View Selector <u>combinations</u> are illustrated and explained in the following table.

> *Note: These Viewer Selections and Right-Click options apply only to the Heavyweight Viewer when it is used by DocuPhase and Progression in the Microsoft Internet Explorer (IE) browser.*
>
> *Although, the Heavyweight Viewer is integrated into the ScanDox product and is generally similar, but due to the integration it has a few differences.*
>
> *The HTML5 Lightweight Viewer has a somewhat different user interface and thumbnail options from the Heavyweight viewer, but both have comparable capabilities.*

Bottom Toolbar View Selector	Right-Click Menu Option Combinations Available
One Page View	This is not a thumbnail view, so the only options are related to the Properties Option and traditional windows operations that can be applied to page annotation objects.
Thumbnail View • With Card View Option **Thumbnail View** • With Aspect View Option 	The Thumbnail View for the Viewer Panel only shows thumbnails. This View with the 'Card View' option displays page images as same-sized thumbnails to provide a uniform display. *For example, displaying an 8"x11.5" Invoice page thumbnail alongside a 2.5"x6" Check thumbnail using the 'Card View' option would make both thumbnails the same size*. This View with the 'Aspect View' option displays page images as thumbnails scaled in size to their original image sizes, but it does not allow the 'Show Page Numbers' option. *For example, displaying an 8"x11.5" Invoice page thumbnail alongside a 2.5"x6" Check thumbnail using the 'Aspect View' option would make the Invoice thumbnail much taller and wider than the Check thumbnail.*

| Page & Thumbnail View	The Page & Thumbnail view in the Viewer Panel, splits the area with Thumbnails in an area at the top and a view of a single image page at a time in the bottom area. This feature can be used with the Card, Aspect, Stacked and Double-Stacked options.
Book View	This is not a thumbnail view, it provides a view of two pages at a time side-by-side so the only options available are related to the Properties Option and traditional windows operations that can be applied to page annotation objects.
Top & Bottom View	This is not a thumbnail view, it provides a view of two pages at a time split between the Top and the Bottom of the Viewer Panel so the only options available are related to the Properties Option and traditional windows operations that can be applied to page annotation objects.

The available Thumbnail Preview Pane options and features are described in the table below.

| Option	Thumbnail Preview Panel Option Description
Thumbnail Views Options:	In *DocuPhase Viewer*, the 'Card' and 'Aspect' thumbnail modes are displayed vertically to the left. Whereas, 'Stacked' and 'Dual Page Stacked' thumbnail modes are displayed horizontally. All of the thumbnail view modes show the currently selected thumbnail page image with a red-border. *Note: There are some minor differences between the DocuPhase Viewer and the ScanDox Viewer, since it has no horizontal thumbnail display pane – only a left-side thumbnail display pane.* Each of the possible Bottom Toolbar Page View Selection icons are explained below; However, each of the Thumbnail Options and expanded View Options may or may not be enabled, as illustrated below.
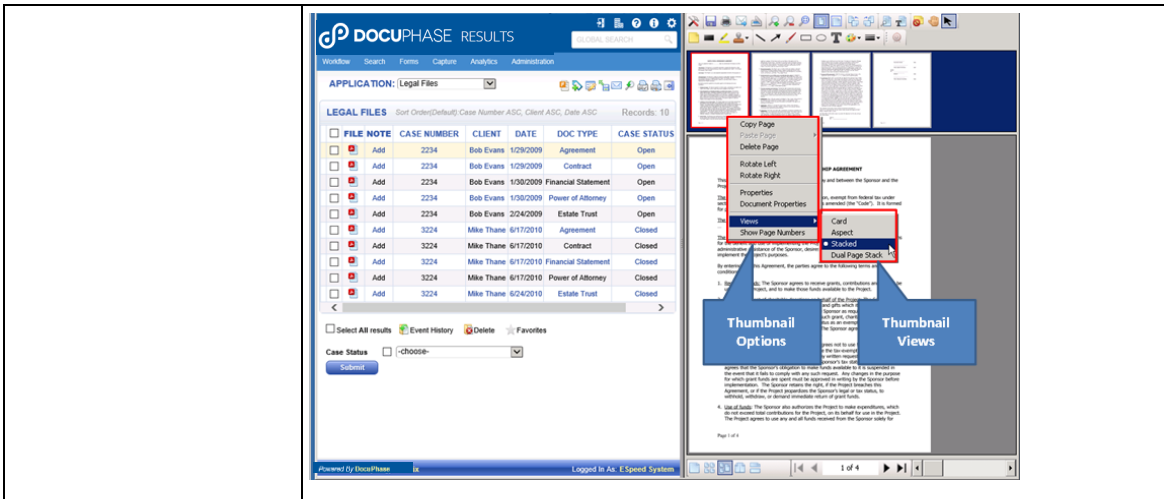
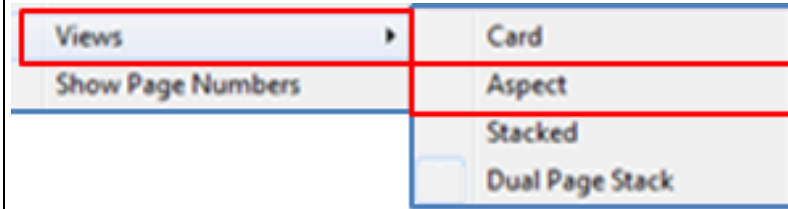| •	**Card View Option**	The Card View selection for the Views option:
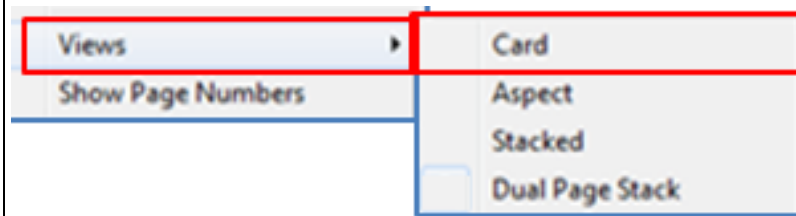
Selecting the Card View feature displays each thumbnail page image in a uniform size regardless of its actual page size, as shown below.
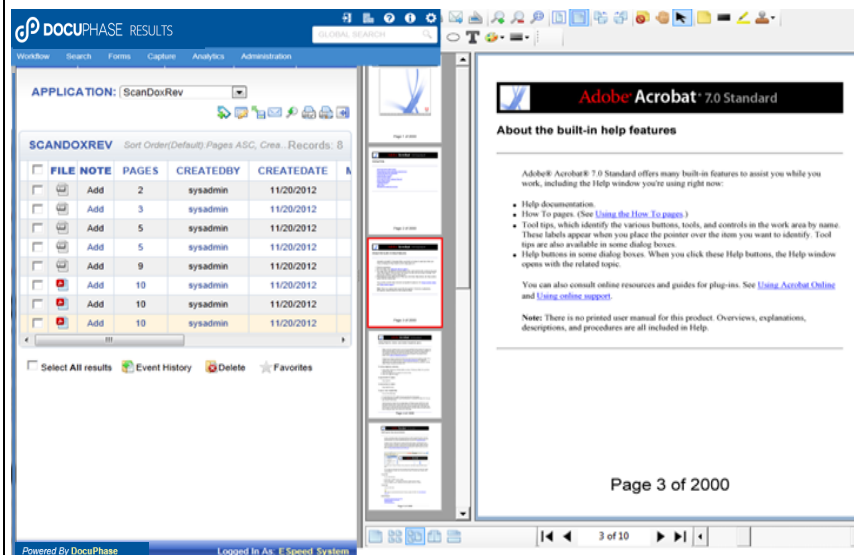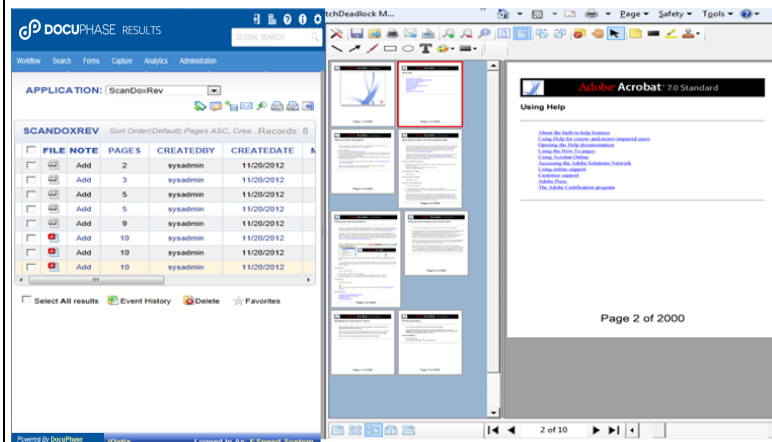
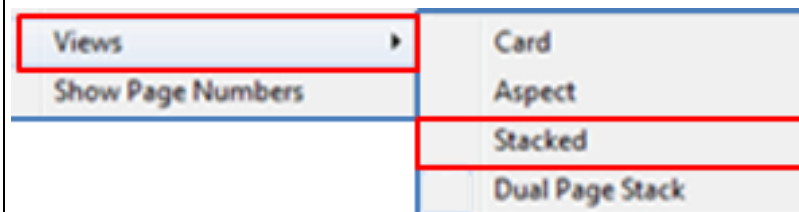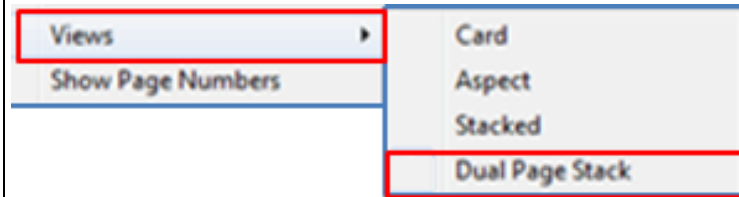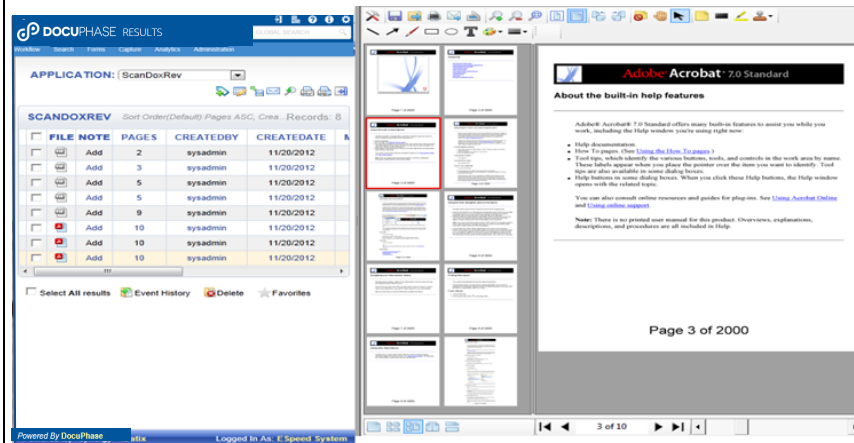|	
• **Aspect View**	The Aspect View selection for the Views option: Selecting the Aspect View feature displays each thumbnail page image in a proportional size to its actual page image size, as shown below. *Note: Since these thumbnail images are of irregular sizes, the 'Show Page Numbers' option is not available with the Aspect View due to the irregular appearance that results.*
• **Stacked View**	The Stacked View selection for the Views option: Selecting the Stacked View feature displays a horizontal grouping of overlapping stacked pages for your selection, as illustrated below.
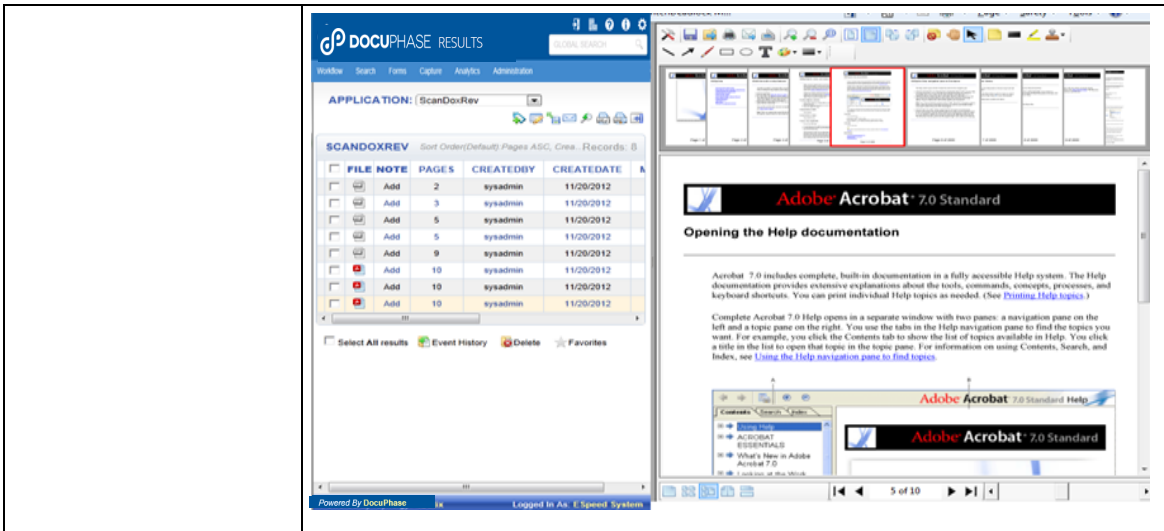
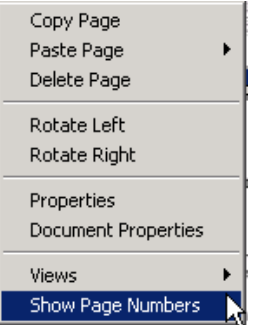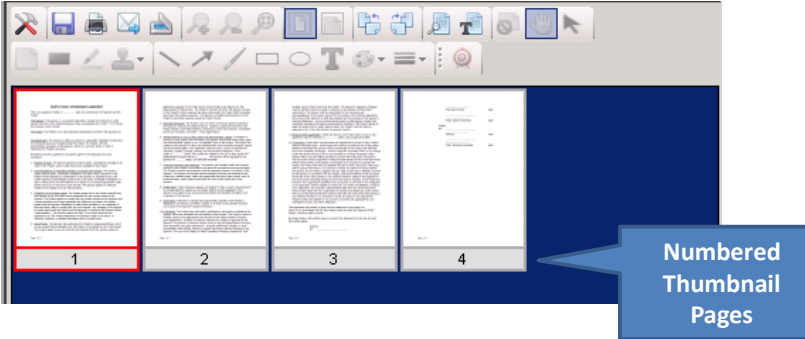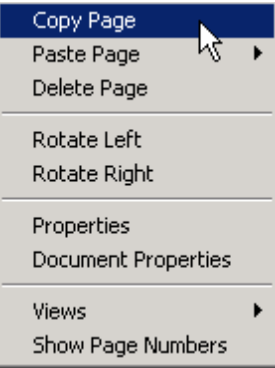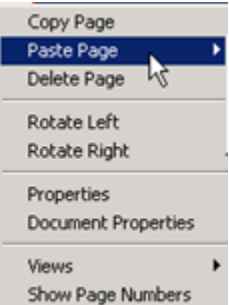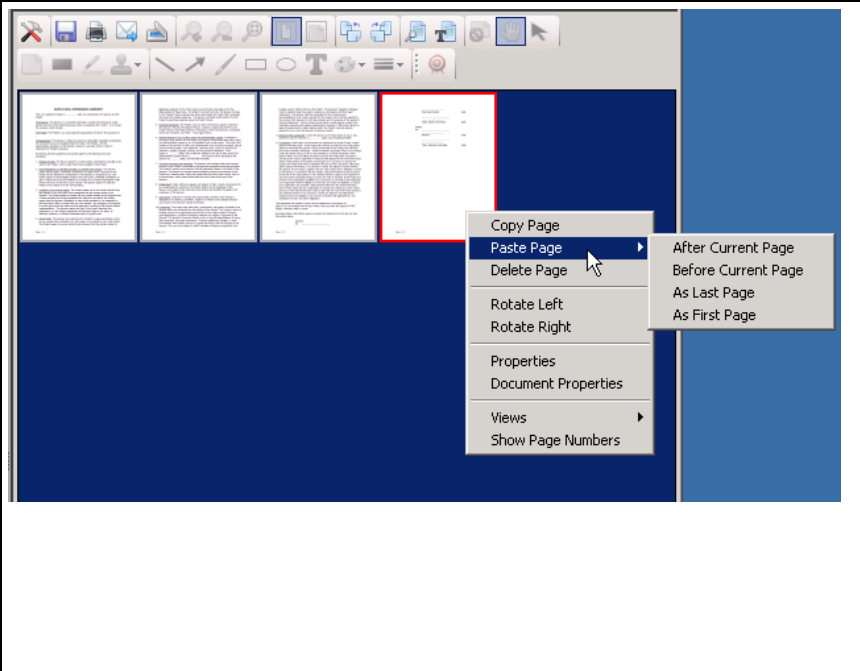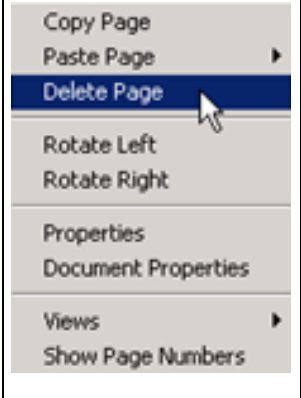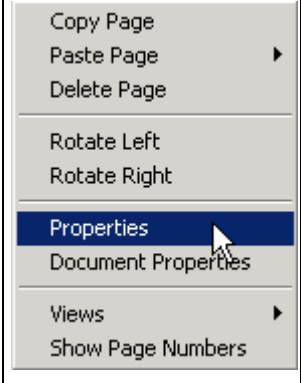|	
• **Dual Page Stack View**	The Dual Page Stack View selection for the Views option:
	Selecting the Dual Page Stack View feature displays a vertical grouping of pages in dual columns for your selection, as illustrated below.
Show Page Numbers Option:	Toggle the automatic numbering of pages on and off in the thumbnail pane under each page thumbnail image.

This page numbering example, shown below, is activated for the thumbnail pane while it is also in Stacked view mode. |

|	
Copy Page Paste Page ▶ Delete Page Rotate Left Rotate Right Properties Document Properties Views ▶ **Show Page Numbers**	 Thumbnail pages numbered 1, 2, 3, 4 **Numbered Thumbnail Pages**
	The Page Numbers option is available for all thumbnail view modes, except the 'Aspect View', since the 'Aspect' image pages are of irregular sizes and the irregular placement of thumbnail page numbers in irregular locations would appear awkward when displayed.
Image Page Manipulation Options:	These options allow you to easily manipulate one or more thumbnail pages after selection with a right-click to select from these menu options.
• **Copy Page** Copy Page Paste Page ▶ Delete Page Rotate Left Rotate Right Properties Document Properties Views ▶ Show Page Numbers	Copy a selected thumbnail's page image to the Windows Clipboard.
• **Paste Page** Copy Page Paste Page ▶ Delete Page Rotate Left Rotate Right Properties Document Properties Views ▶ Show Page Numbers	Paste a page image from the Windows Clipboard relative to the current cursor location in the thumbnail pane (i.e., the thumbnail image highlighted in the Red box) using the Right-Click menu. The Paste Page Option's submenu displays the following choices to allow you to conveniently select where your copied page will be pasted: • After Current Page • Before Current Page • As Last Page • As First Page

• **Delete Page** 	Remove the selected page thumbnail image from the current document.
• **Properties** 	The Properties option displays attributes of the currently selected page in the viewer and provides a Document Properties button that will display specific information about the current page, as shown below.
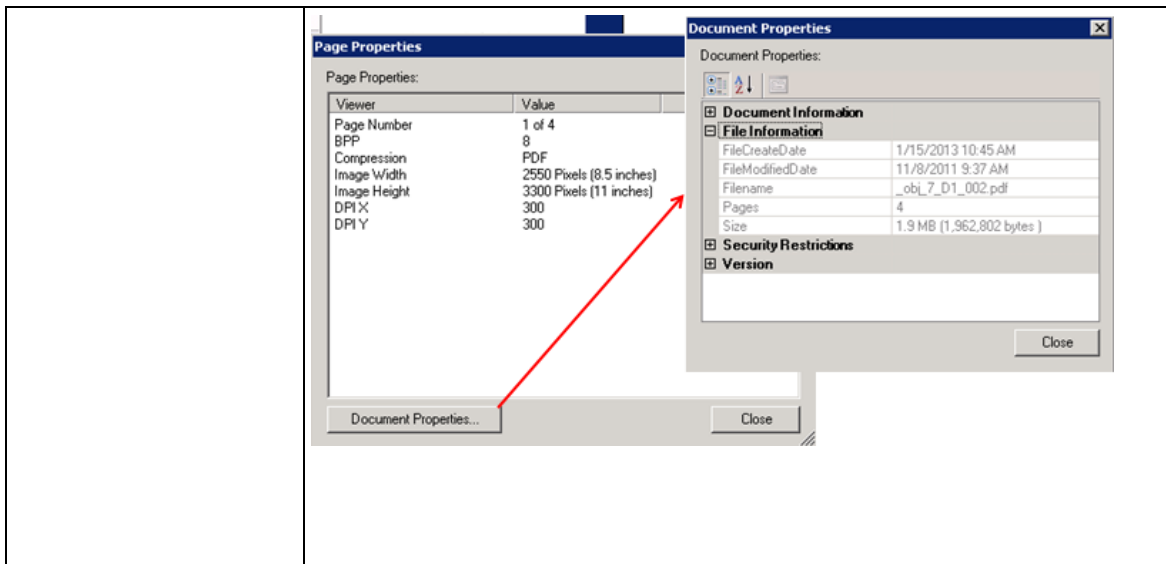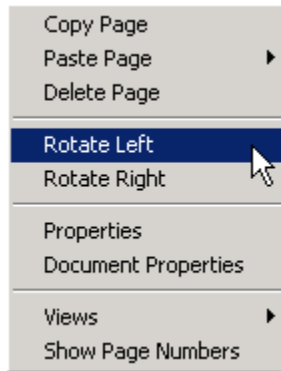
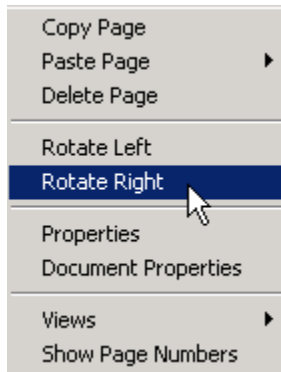| | For the selected thumbnail image(s), Rotate the image 90-degrees to the Left (i.e., Counter Clockwise)) which causes the associated document(s) to be rotated and both the thumbnails and the page images will appear as rotated in the viewer. |

- **Rotate Left**
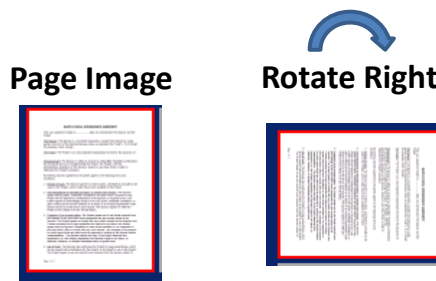

Rotate Left   **Page Image**
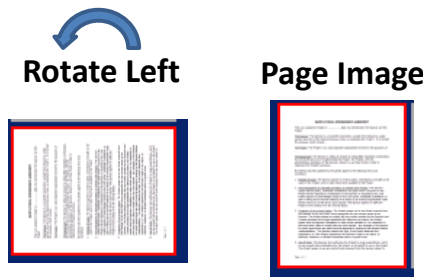
- **Rotate Right**

For the selected thumbnail image(s), Rotate the image 90-degrees to the Right (i.e., Clockwise)) which causes the associated document(s) to be rotated and both the thumbnails and the page images will appear as rotated in the viewer.

Page Image   **Rotate Right**

Image Viewer Hot Keys

An alternative shortcut method for performing many of the DocuPhase Viewer's Top and Bottom Toolbar, the following Hot Keys can be used to active these functions without moving the mouse, as described in the table below.

DocuPhase Viewer Hot Key Features

Hot Key Feature	Context Description & Key Combination
Get Focus	While in Page View Mode, press: [Tab] key or [Shift+Tab] keys
Tab Left	While in Book or Thumbnail Mode, press: [Shift+Tab] keys
Tab Right	While in Book or Thumbnail Mode, press: [Tab] key
Page	To set Page View Mode, press: [Alt+1] keys
Thumbnail	To set Thumbnail Mode, press: [Alt+2] keys
Page & Thumbnail	To set Page & Thumbnail Mode, press: [Alt+3] keys
Book	To set Book Mode, press: [Alt+4] keys
Top & Bottom	To set Top & Bottom Mode, press: [Alt+5] keys
Zoom In	While on focus of document, press: [Left-Arrow] key
Zoom Out	While on focus of document, click: [Right-Arrow] key
Best Fit	Press: [Alt+6] keys
Fit to Width	Press: [Alt+7] keys
Pan Left	While on focus of document, press: [Left-Arrow] key
Pan Right	While on focus of document, press: [Right-Arrow] key
Pan Up	While on focus of document, press: [Up-Arrow] key
Pan Down	While on focus of document, press: [Down-Arrow] key
Go To Page	Press: [Ctrl+Shift+N] keys (i.e., # of pages = N)
Rotate Left	Press: [Ctrl+Shift+Minus] keys (i.e., Minus Sign "-" key)
Rotate Right	Press: [Ctrl+Shift+Equal] keys (i.e., Equal Sign "=" key)
Cut (Annotation)	Press: [Ctrl+x] Keys
Copy (Annotation)	Press: [Ctrl+c] Keys
Paste (Annotation)	Press: [Ctrl+v] Keys
Clear (Annotation)	Press: [Del] Key

These shortcut Hot Keys are only available with the DocuPhase ActiveX Heavyweight Viewer. The HTML5 Lightweight Viewer utilizes a similar, but different set of hot-keys.

Using the Application & Viewer Panes

The first time the Document Pane loads, (prior to a search) it contains no Documents and is empty. To display existing Documents in the Document Pane, follow these steps:

1. Select an **Application**.
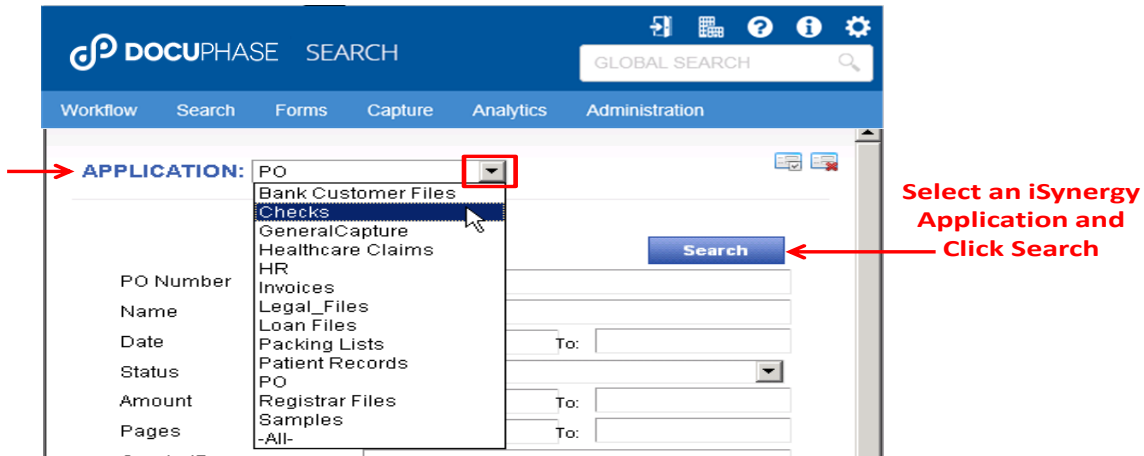
2. Select **Search**.

This search example did not contain any specific search values so it produced a non-specific search result that returns all files in the selected Application to the Results page. The Results page contains a Results table that lists the Indexed Documents.
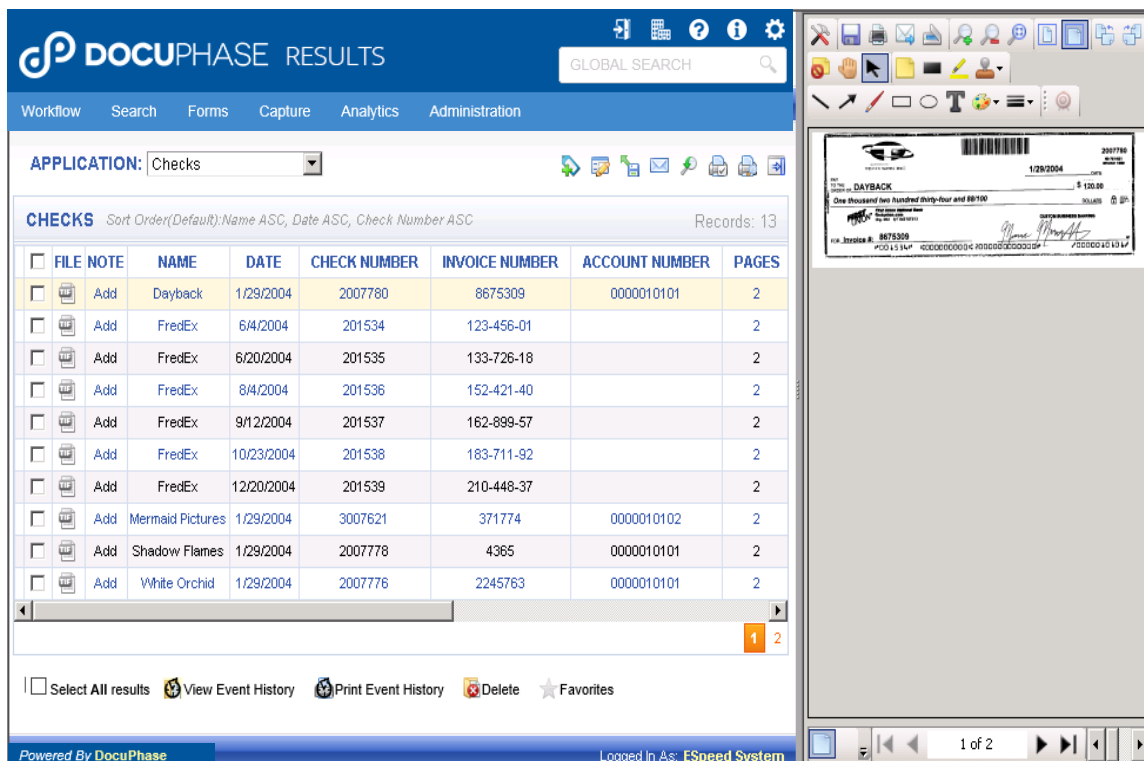
By default, the Document Pane displays the first document listed in the Results table, as shown above.

When more documents than the items-per-page limit are returned, a list of Results Pages is displayed allowing you to easily navigate to each page of search results, as shown at the bottom right of the previous illustration.

Scanning

Scanning is the process of converting paper Documents into electronic formatted Documents.

When converted by scanning, an electronic Document becomes an image file with the extension TIFF (Tagged Image File Format) – Also, other scanned document formats are possible and can be stored in DocuPhase (e.g., PDF, JPG, etc.). This process of converting paper Documents to digital Documents typically uses high performance, production-oriented scanners that can process from 15-200+ pages per minute.

DocuPhase can route, store and manage converted TIFF Documents as pages of native images. The DocuPhase document viewer is able to display, manipulate and annotate TIFF images.

> ☺ **Note:** *Although other types of document and image files can be stored in DocuPhase an alternate viewer appropriate to the file type may be employed for viewing and/or access.*

For example, Microsoft Word, PowerPoint, Excel documents may be stored in DocuPhase and viewed within DocuPhase as well as viewed and edited using their original products when configured and permissions allow.

Other specialized products like Microsoft Visio, Project or CAD drawings, etc. can also be viewed with another viewer designed for that purpose.

Likewise, sound and video files can be stored in DocuPhase and when accessed, appropriate sound and video player software present on your workstation and associated with the file suffix can present the sound/audio content.

Print

The Print option prints all selected Documents shown on the Results page. Documents selected for printing are sent to printers defined and visible to the local client machine.
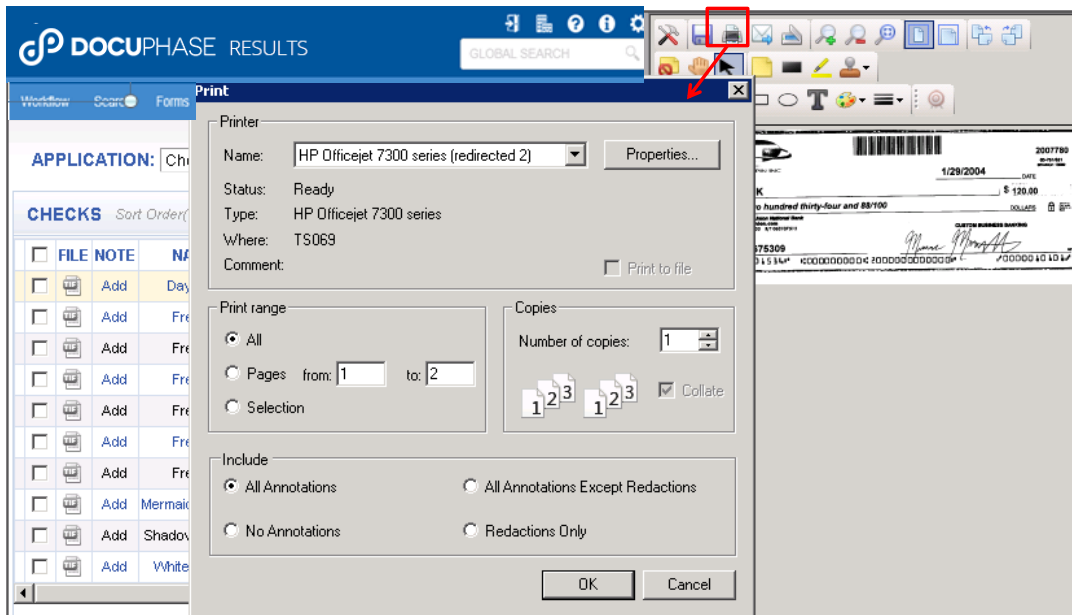
Toggle Full Screen

This option toggles the Results page to display a full screen allowing tables with large amounts of data to be viewed more easily.
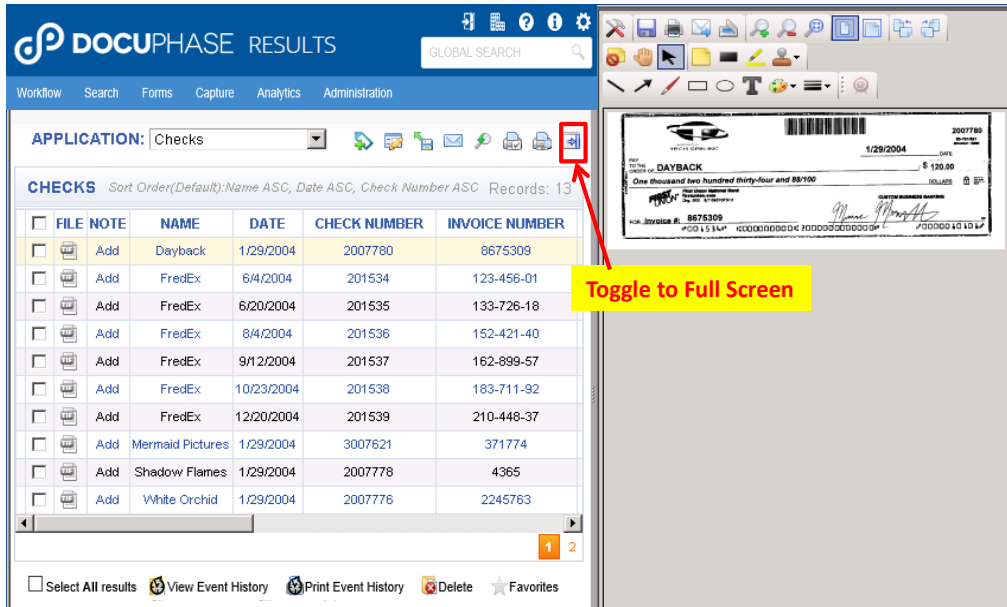
The wider full screen allows the user to see additional columns of index fields at one time, as shown below.
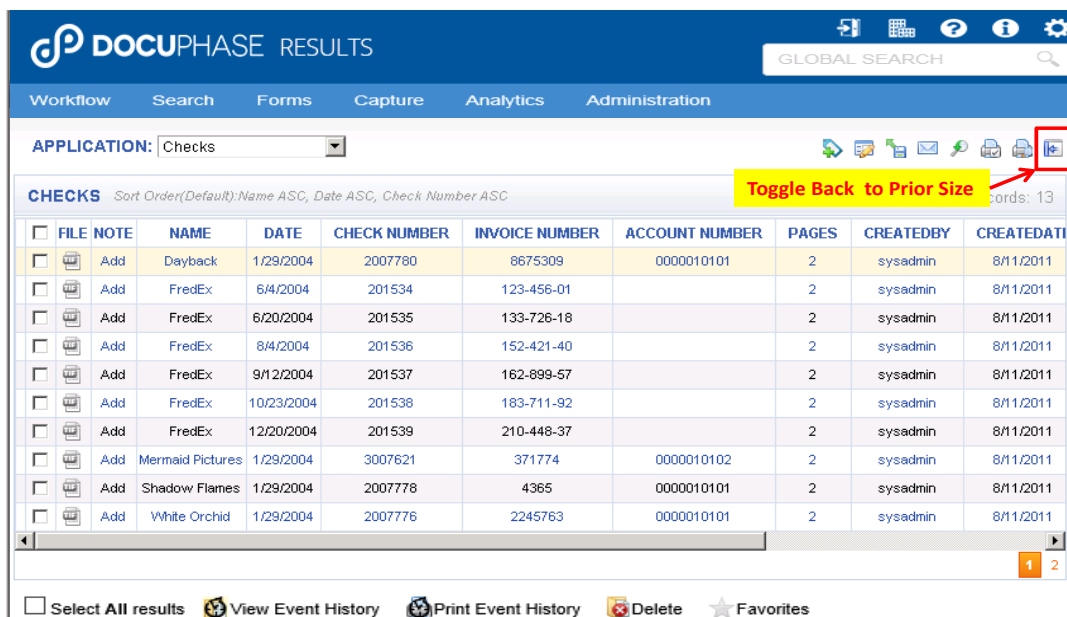
Clicking on the Toggle Full Screen option when the arrow points to the left, causes the Results page view to return to its standard size, as shown in the original example above.

SQL Examples to Query the DocuPhase Database

The following SQL statement examples are provided to help you understand how to develop SQL Query operations on the *DocuPhase Database* using basic SQL statements to obtain specific information to create custom reports or troubleshoot problems, etc.

> ☑ **Important Advisement:**
>
> *As these examples suggest, the DocuPhase Database tables may be accessed for external integration, reporting, etc. Although these internal database names and structures are generally stable, they may be altered as new enhancements are released without external notice which could impact custom external SQL access procedures.*

This capability for your DocuPhase administrators and designers to query the *DocuPhase Database* is especially important to the configuration of *Data Exchange* and other components of the DocuPhase Platform.

View Specific Records in Tables

- Select * from <table> where <column name> = 'string' ex. Select * from _obj_2 where IDX_SSN = '111-22-3333'

- Select * from <table> where <column name> like '%partial string%'

For example, Select * from _obj_2 where IDX_SSN like '%111-22-3%'

Update Specific Records in Tables

When using this SQL Statement, do not forget the specific where clause to the record you are updating or you might update the entire table in error. Ensure you have isolated a unique record with the where clause.

1. Update <table>

2. Set <column name> = 'correct data'

3. Where <column name> = 'current value' and <column name> = 'current value'

For example,(1) Update _obj_2, (2) Set IDX_SSN = '111-22-3333' (3) Where objectid = 2 and IDX_Name = 'John Doe'

View Data Events

The select statement, shown below, is defined to look for all status changes in the EventLog table which were for a specific DocuPhase Application where its document status changed from "P" to another status code value:

- The DocuPhase Application in this case is Application Table #2 which actually refers to the "_obj_2" eSpeed database table.
- The original OldValue to find is a "P" status that indicates that the document is "Pending Indexing" which is changed once the document is indexed.
- Typically the NewValue assigned after indexing is completed is an "E" status, but this SQL query will accept any NewValue assignments.

The example SQL query:

- select * from eventlog where oldvalue = 'P' and applicationid = 2 and eventdesc = 'status'

   Note: You can change the oldvalue parameter, applicationid parameter and eventdesc as required to create the search criteria you need.

View Current Group/User Level Permissions

The statement below is for Users:

- Select permissions.permissionname, users.username

- From users, permissions, userpermissions

- Where userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid

The statement below is for Groups and Users.

- Select distinct users.username, permissions.permissionname,applications.name, usergroups.groupname

- From applications, users, permissions, userpermissions, usertogroup, grouppermissions,usergroups

- Where applications.applicationid = grouppermissions.applicationid and userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid and usertogroup.usergroupid = usergroups.usergroupid

DocuPhase Web Server, DB and Image Store

The following diagram provides you with a general overview of the DocuPhase Platform server and services architecture.