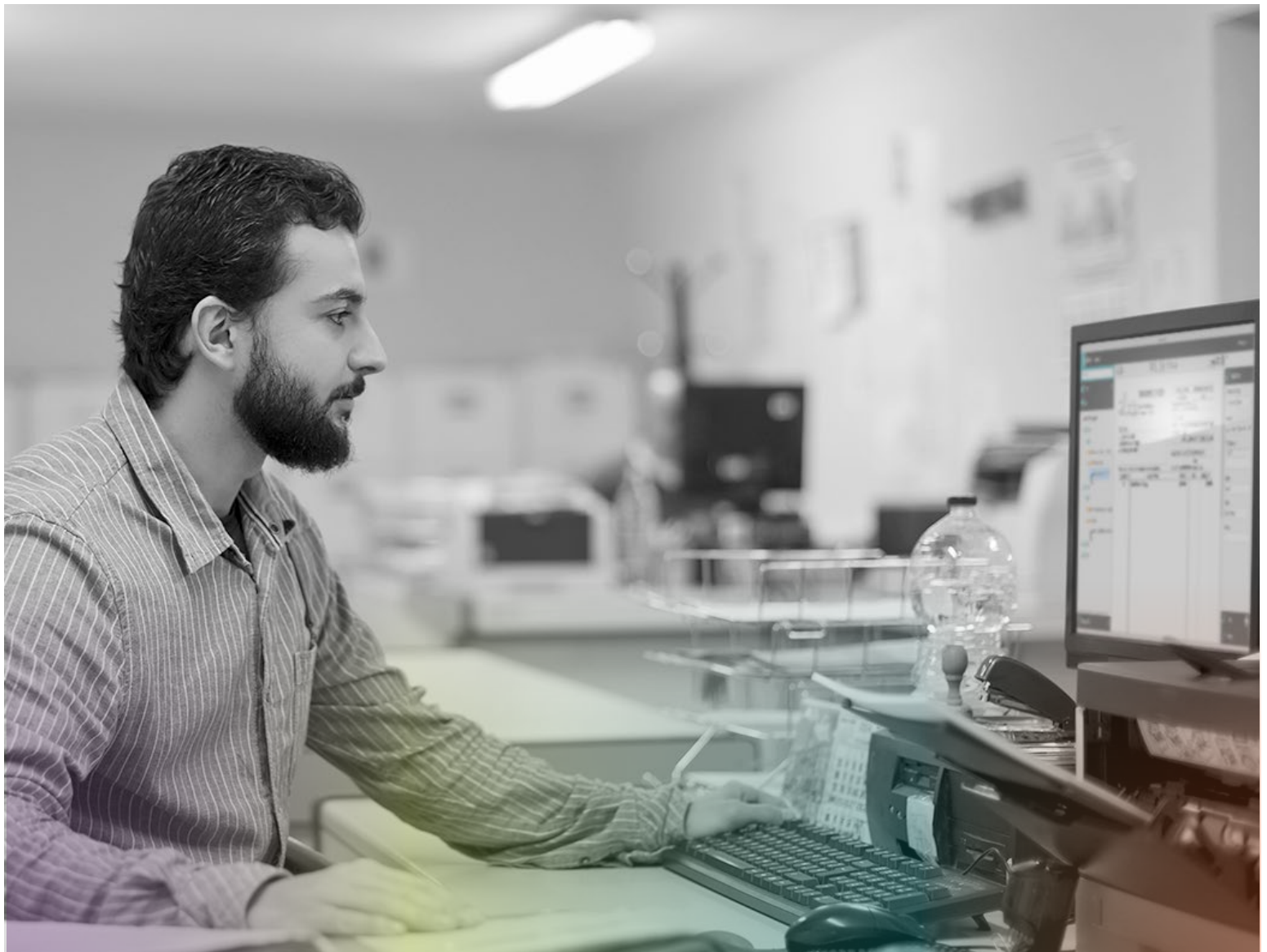




# Content User Guide

VERSION 2024.1



VERSION 2024.1



The Next Generation of Paperless™ | [www.softdocs.com](http://www.softdocs.com)

Content User Guide | October 2024

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# 1

## Etrieve Content Overview

### 1.1 What is Etrieve Content?

Etrieve Content is Softdocs' next-generation, browser-based enterprise content management solution. Etrieve Content allows for various means of information entry and provides centralized, secure storage of content (documents, records, images, etc.) across your institution.

---

### 1.2 Logging into Etrieve Content and the Content Page Layout

Before logging into Etrieve Content, a user must first open a web browser and navigate to the Etrieve Content website address. The following browsers are supported:

- ▶ Google Chrome
- ▶ Microsoft Edge Chromium
- ▶ Mozilla Firefox
- ▶ Safari (Mac/iOS)

Next, the initial “splash page” will be presented, allowing the user to select an identity provider.

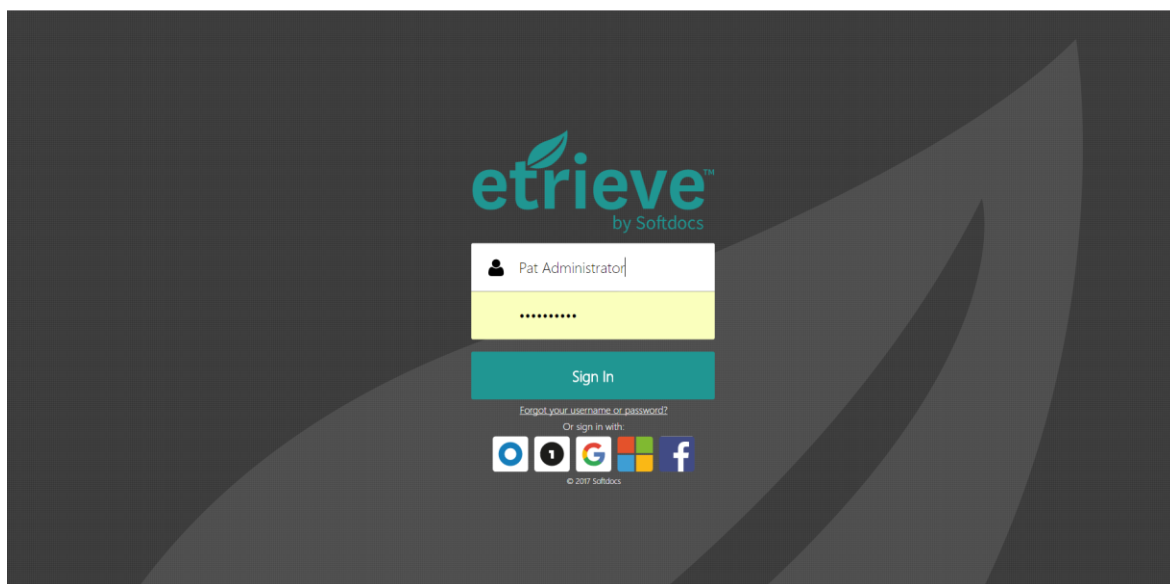


FIGURE 1.1 Etrieve Sign In “Splash” Page

**TIP** Add the Etrieve Content website to the list of trusted websites in the domain.

Users are now able to sign in with an Etrieve account or start an identity provider (e.g. Google, Facebook, ADFS, Microsoft, Okta and OneLogin) sign in from the Etrieve sign in page. The look of this page and the list of possible identity providers will depend on the institution’s particular needs and configurations.

Your institution may have elected to implement an initial message (such as a FERPA warning) which must be agreed to before logging in. The width of the dialog is controlled by the text placed in the dialog. When composing a message to be displayed, the user must construct their lines to not exceed their desired width for the dialog box. Depending on the message length, the desired width may be different.

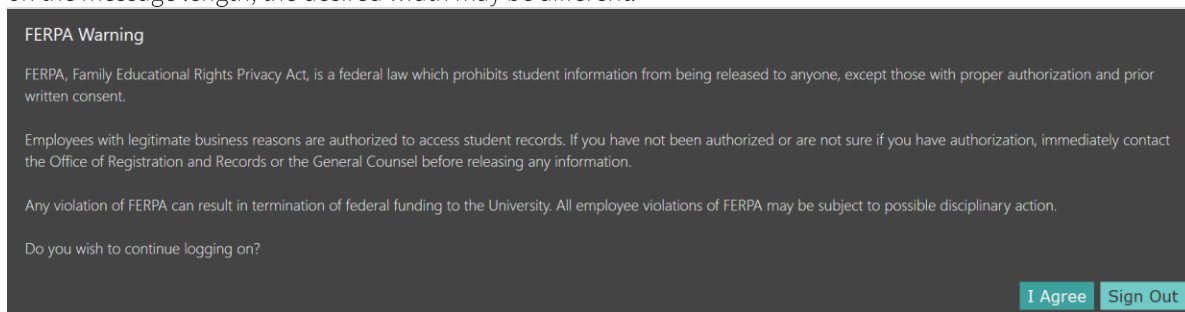


FIGURE 1.2 FERPA Warning Acknowledgement

If the user has been allocated an Etrieve Scan license, the first time he or she logs in to Etrieve, a panel will be displayed requesting that the user download the necessary scanning utility to support the scanner. If Download is selected, the software will be downloaded; if Close is selected, it will not. If the software is not downloaded, the message will be presented after login as long as the Etrieve Scan license is allocated to this user. This software need only be downloaded one time; if other users with Scan licenses use the same PC, no additional prompts will be given. If a user with a Scan license logs into another PC and the scanning utility has not been previously installed, the user will again be prompted to install the software. Users can scan into Content using a Mac or PC. The only difference between scanning with a PC or Mac is that Mac users are unable to scan into Etrieve File.

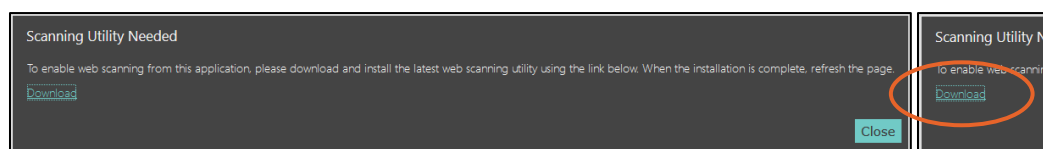


FIGURE 1.3 Etrieve Prompt Scanning Utility Needed



The Etrieve Content page layout is divided into four sections:

- ▶ Header (top bar)
- ▶ Navigation Panel (left column)
- ▶ Viewer and Toolbar (center page)
- ▶ Index Panel (right column)

What is displayed in these four sections will vary depending on the user's security. For instance, the only Areas which will appear under the Tree in the Navigation Panel are those Areas containing Document Types for which the user has been granted some level of access.

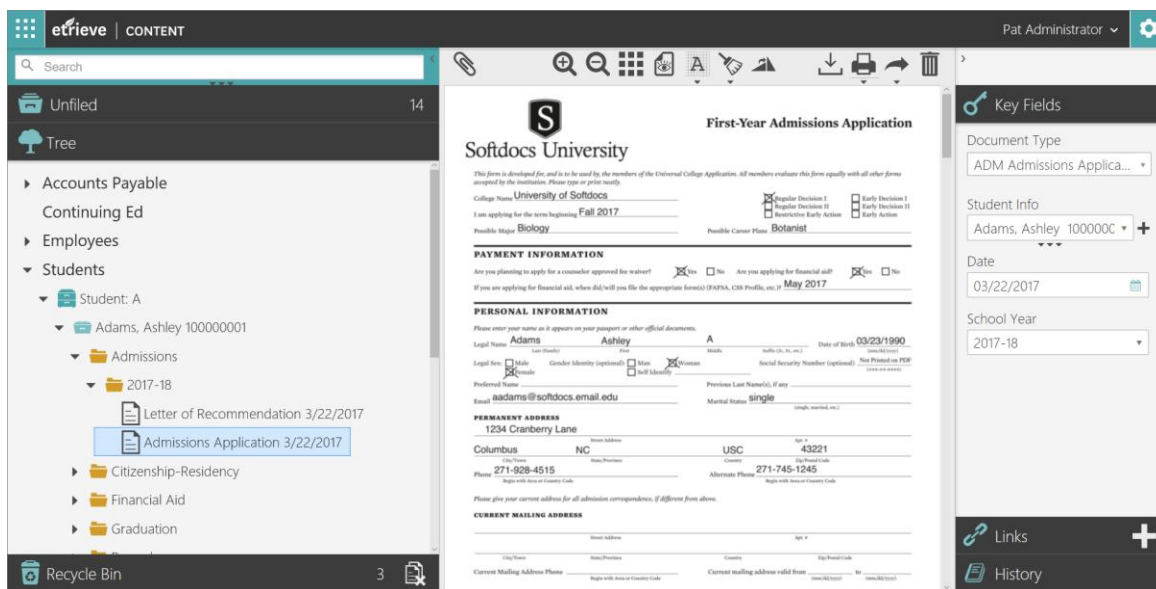


FIGURE 1.4 Etrieve Content Page Layout

### 1.3 Header

The header is the topmost bar on the Content Page. It contains four sections:

- ▶ App Switcher
- ▶ Etrieve | Content (View Reset)
- ▶ Username
- ▶ The Cog (Configuration Menu Access)



FIGURE 1.5 The Header

**APP SWITCHER** | Clicking this icon (nine white squares) opens a three-button menu, allowing the user to navigate between Central, Content, and Security, which are the three main Etrieve applications.

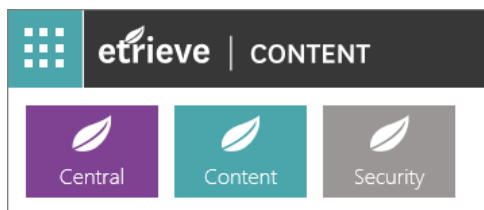


FIGURE 1.6 App Switcher

**ETRIEVE | CONTENT** | Clicking here resets the user's view, clearing all searches and closing any document currently being viewed. It will return the user to the initial EtrieveContent Page.



FIGURE 1.7 Etrieve | CONTENT

**USERNAME** | The username of the currently logged in user. Clicking on the username will display a dropdown menu with three options for administrators— About, Community, and Sign Out. The About page contains technical information about Etrieve, including the version number, copyright date, and tabs for Licenses and Deployment Information. The Community option is only available for users with administrative privileges for Etrieve, and selecting it redirects an administrator to the Softdocs Community to seek any additional information or assistance with Etrieve. Users should always exit Etrieve using Sign Out rather than simply closing the browser window, because Sign Out immediately returns the Etrieve license to the pool.

**CONFIGURATION MENU ACCESS (THE “COG”)** | This icon appears only if the user has been granted administrator privileges in Etrieve Content. It allows administrators access to the Etrieve Content administration menus.

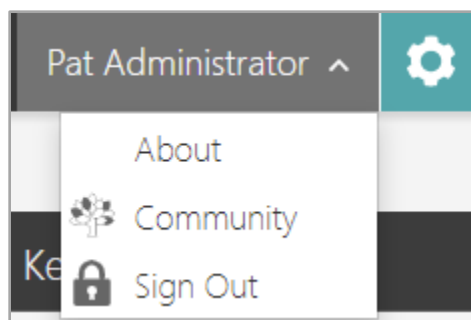


FIGURE 1.8 User Logged-In | The Cog

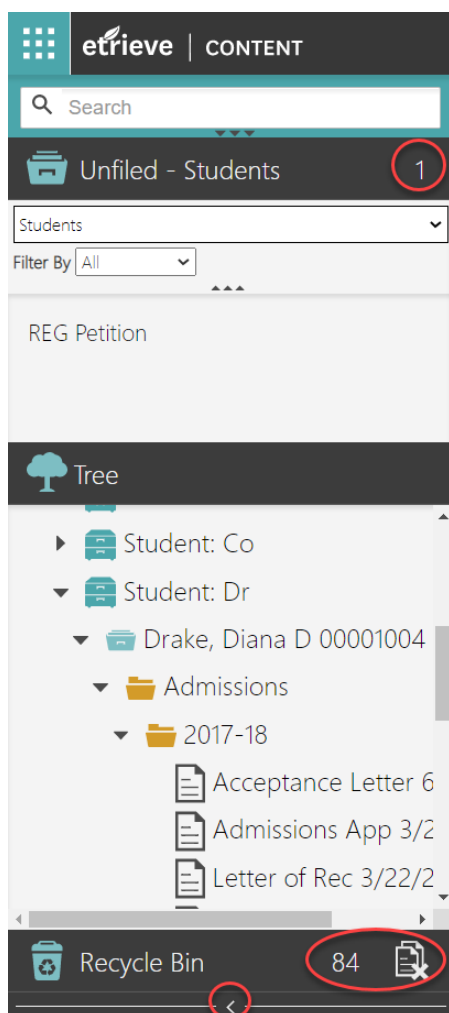
---

## 1.4 Navigation Panel

The Navigation Panel is used for various operations on documents, such as location and selection. It may be collapsed into a “sidebar” menu to increase the size of the Viewer by clicking the small gray arrowhead (<) at the bottom of the panel.

It contains four sections:

- ▶ Search
- ▶ Unfiled Documents
- ▶ Tree
- ▶ Recycle Bin



**TIP** The Badge icon counts the number of unfiled documents in a given area.

**TIP** The Badge icon displays the number of documents in the Recycle Bin for permanent deletion.

FIGURE 1.9 The Navigation Panel

### 1.4.1 Search

Use the Search field to locate document(s) in the Tree by entering information about its key fields or OCR text (if Optical Character Recognition was set for the Document Type).

For simple searches, start typing in the Search field, and Etrieve will start suggesting results. For instance, entering the name or ID of an employee, vendor, or student will take the user to the Drawer level in the Tree. This is the most popular function of search.

To access the Advanced Search feature, click on the three small arrowheads just below the center of the Search field and complete the fields as needed. The Search field will expand to allow the user to enter multiple search criteria to locate the desired document(s). Upon successfully adding criteria to the search, completed fields will refresh to allow additional criteria to be entered as needed.

An Advanced Search is really two or more simple searches which work together to help locate the desired document(s) in the filing Tree. Click the + Add Search Field button to add additional Search filters. Search fields will “stack”, and may be deleted if unwanted.



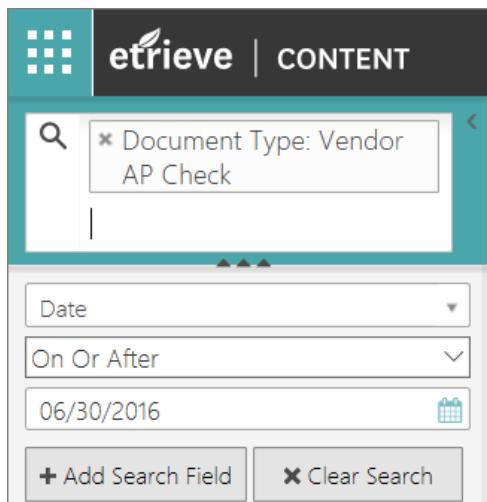


FIGURE 1.10 Advanced Search Feature

To reset Search, users should either click the “Clear Search” button or click Etrieve | CONTENT in the header after working with the located document(s). After a search has been performed, a count of the number of documents located may be obtained by hovering the cursor over the Tree bar for a few seconds, after which a panel will be displayed in the Viewer to report the document count.

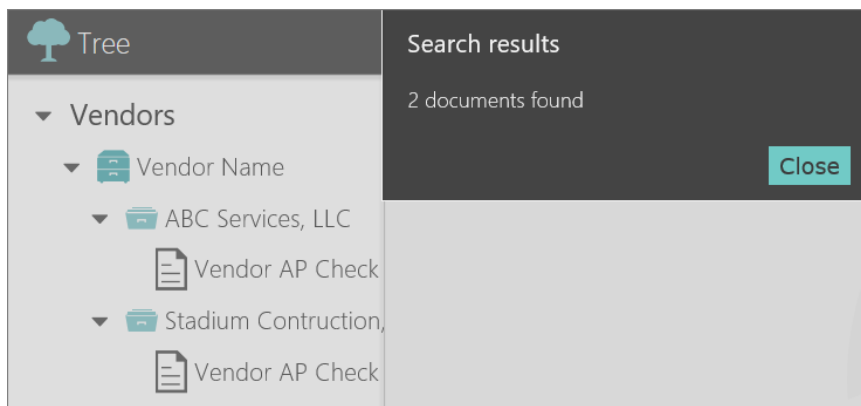


FIGURE 1.11 Document Count Search Results

#### 1.4.2 Unfiled Documents by Area

Documents may be brought into the Etrieve Unfiled Area by scanning or attaching. Documents not filed by Etrieve’s automated import mechanism will also arrive in the Unfiled Area.

There is a single, distinct location for Unfiled documents for each Area. Unfiled documents are listed in the order of their arrival, with the most recently arrived document at the top of the list.

A count of Unfiled items is also displayed on the Unfiled Area bar. The contents of the Unfiled documents may be filtered to show all Unfiled documents, the current user’s documents only, or imported documents only. To access the filter, click on the Unfiled bar, which will expand the view, then click on the three small arrowheads below the Area dropdown menu. To collapse the view, click on the arrowheads again.

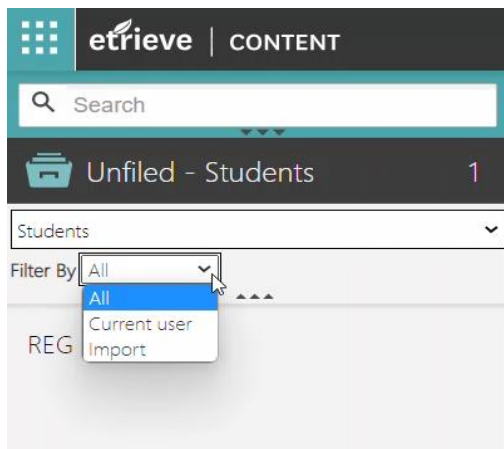


FIGURE 1.12 Unfiled Documents 'Filter by'

### 1.4.3 Tree

The Tree displays the electronic filing structure of Etrieve Content Areas. Areas in the Tree and their components may be opened and their contents displayed by clicking the arrowheads to the left of the filing levels which comprise each Area, or by double clicking on the text of the filing level. To collapse the view, click the arrowheads again. The hierarchy of Tree components is Area, Cabinet, Drawer, Folder(s), and Document.

**NOTE** An Area must have at least one folder level defined before documents will file into the Tree.

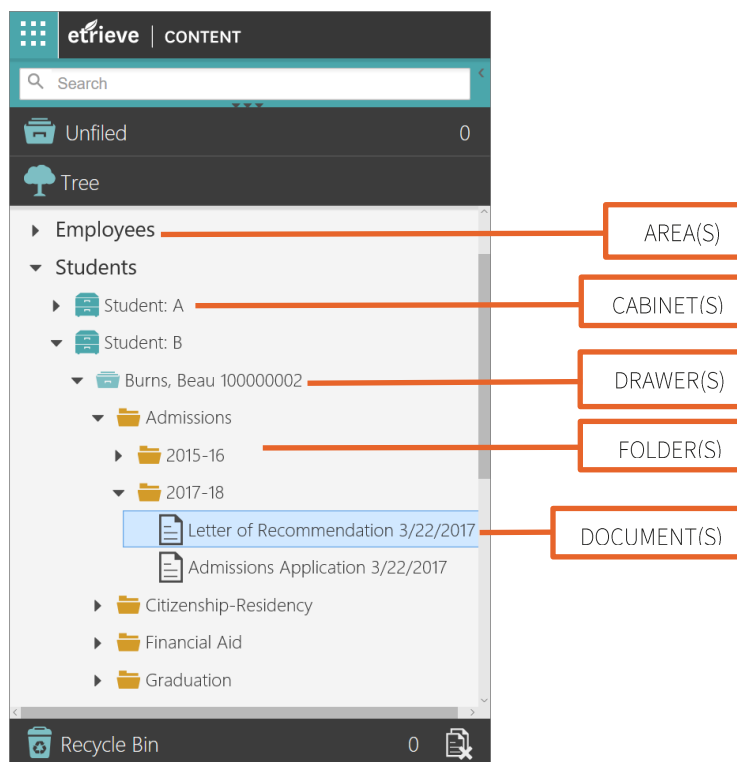


FIGURE 1.13 Tree

### 1.4.4 Recycle Bin

Similar to the Unfiled Documents Area, there is a single distinct Recycle Bin for each Area.

Deleted documents are moved to the Recycle Bin. They remain there until they are either purged permanently by an Etrieve Content Administrator or recovered by a user with the granted permission to recover deleted documents (Document Delete). Users with the Document Delete privilege can recover documents from the Recycle Bin by clicking the Recycle Bin bar to expand the contents. A list of deleted documents is displayed, and individual documents may be recovered by clicking the refresh button to the right of the document name.

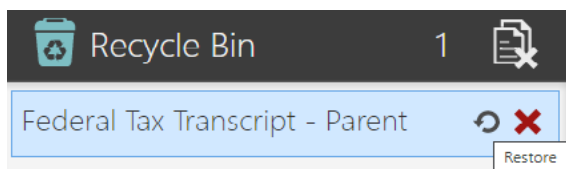


FIGURE 1.14a Restore Document

If a document is recovered from the Recycle Bin, Etrieve attempts to return it to its original location within the Tree. If that is not possible due to modifications to the Tree's filing structure in the intervening time between deletion and recovery, the recovered document will return to the Unfiled Documents Area.

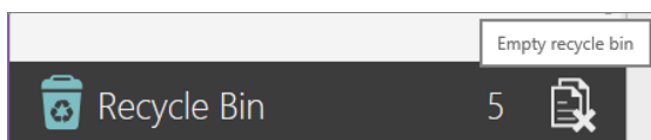


FIGURE 1.14b Empty Recycle Bin

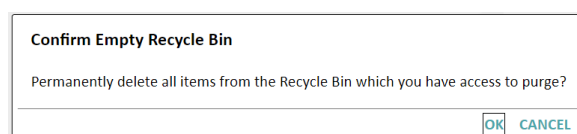


FIGURE 1.14 c Confirm Empty Recycle Bin

**IMPORTANT NOTE** | Administrators may choose to completely purge an Area's Recycle Bin using the icon on the Recycle Bin bar, or may purge individual deleted documents by clicking the Recycle Bin bar to expand the contents. A list of deleted documents is displayed, and they may be permanently deleted by clicking the red X to the right of the document name.

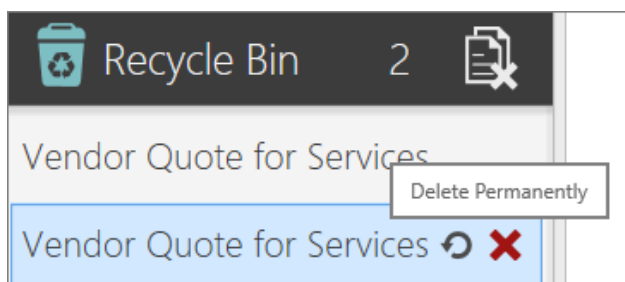


FIGURE 1.14d Delete Document Permanently

## 1.5 Viewer

The Viewer is the section in the middle of the page that displays the selected document. At the top of the Viewer is the Toolbar. The icons for annotation tools and cleaning tools open a second toolbar when clicked, allowing users with the correct permissions to modify the document image in the Viewer using those tools.

**NOTE** | When a protected PDF is open in the Viewer, a padlock icon will be visible in the top left corner. Protected PDFs are discussed more in section 1.5.3.

**Softdocs University**

**BILL TO:**  
**SOFTDOCS, INC.**  
 BUSINESS OFFICE  
 807 BLUFF RD.  
 COLUMBIA, SC 29209  
 PHONE (803) 695-6679  
 FAX (803) 695-6644  
 WWW.SOFTDOCS.COM

**P.O. NUMBER**  
 P0024421

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**VENDOR**  
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ITEM NUMBER	QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
1	6.0	MO	MONTHLY RENTAL UNIT #372 UNITS, DECEMBER 30, 2016 02_220_00_541200_35003	99.00	594.00

FIGURE 1.15 The Viewer

In addition to PDFs and graphics (PNG, TIFF), the following document file types are also supported by the Viewer. The Toolbar actions of Attach, Scan, Split, Thumbnail View, Annotations, Cleaning Tools, and Redactions are not enabled for these documents. The ability to view documents in a read-only format eliminates confusion between viewing an image of a document and viewing one of the following document file types:

- ▶ AutoCAD (DWG)
- ▶ MS Word (DOC) (DOCX)
- ▶ MS Excel (XLS) (XLSX)
- ▶ MS PowerPoint (PPT) (PPTX)
- ▶ JPEG 2000 (JPG2)

**THE COMMON APPLICATION**

**FIRST-YEAR APPLICATION**

**APPLICANT**

Legal Name: Burns, Beau B.  
 Preferred name, if not first name (only one):  
 Birth Date: 03/23/1990  
 Sex assigned at birth: ☐ Male ☒ Female  
 US Social Security Number, if any: 678-54-5454  
 E-mail Address: aadams@softdocs.email.edu  
 Preferred Telephone: ☐ Home ☒ Mobile Home (271) 928-4515  
 Mobile: ( )  
 Permanent home address: 1234 Cranberry Lane, Columbus, NC, USA, Apartment # 43221  
 If different from above, please give your current mailing address for all admission correspondence: (from ) to )  
 Current mailing address: ( )  
 If your current mailing address is a boarding school, include name of school here:

**FUTURE PLANS**

Your answers to these questions will vary for different colleges. If the online system did not ask you to answer some of the questions you see in this section, this college chose not to ask that question of its applicants.  
 College: Cornell  
 Entry Term: ☐ Fall (Jul-Dec) ☐ Spring (Jan-Jun)  
 Decision Plan:   
 Academic Interests: Biology, Geology, Botany, Entomology  
 Career Interest: Botanist, Scientist, Research  
 Deadline: (mm/dd/yyyy)  
 Do you intend to apply for need-based financial aid? ☒ Yes ☐ No  
 Do you intend to apply for merit-based scholarships? ☒ Yes ☐ No  
 Do you intend to be a full-time student? ☒ Yes ☐ No  
 Do you intend to enroll in a degree program your first year? ☒ Yes ☐ No  
 Do you intend to live in college housing? No  
 What is the highest degree you intend to earn? Masters

**DEMOGRAPHICS**

Citizenship Status: U.S. Citizen  
 1. Are you Hispanic/Latino? ☐ Yes ☒ No ☐ I am unsure of my background

FIGURE 1.16 Microsoft Word Document with disabled Tools

### 1.5.1 Toolbar

The Toolbar allows users to bring new documents into Etrieve and to interact with them afterwards. For users without the necessary permissions to perform an action, the corresponding icon will be grayed out and unavailable.

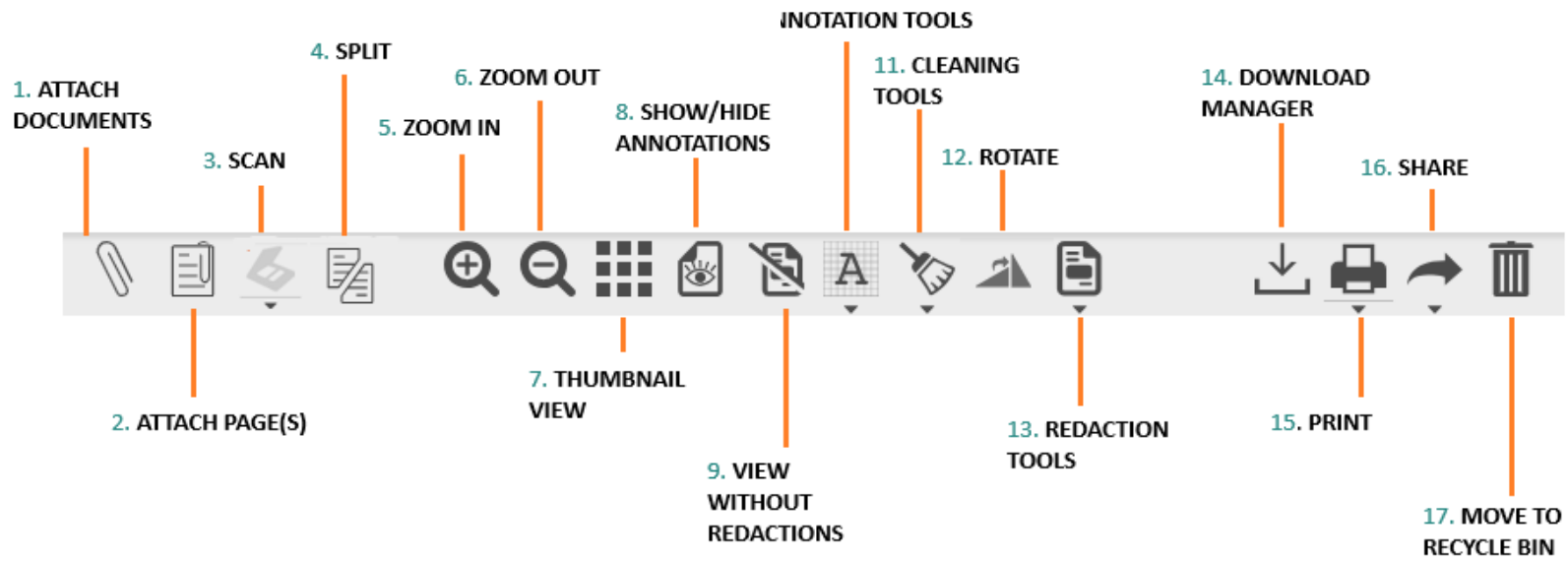


FIGURE 1.17 Toolbar

**1 ATTACH DOCUMENTS** | Allows the user to import a document either into an Area's Unfiled Documents or folder.

**2 ATTACH PAGE(S)** | Allows the user to import additional pages to attach to the existing document.

**NOTE:** Attaching a protected PDF to an existing document is not allowed. User will receive an error message.

**3 SCAN** | Users with scanning privileges can scan documents into an Area's Unfiled Documents or folder, or attach the scanned document to a document open in the Viewer. The user can utilize Etrieve scanning preferences or access Third Party preferences through the advanced configuration settings. To access advanced scanner configuration settings, click on the down arrow at the bottom of the scan button. Settings are stored per user. Users can scan into Content using a Mac or PC; scanning with Mac functions identically to scanning with a PC except for the ability to scan into Etrieve File, which is only available on a PC. When the "Duplex" option is selected, the option "Each Page is New Document" is disabled.

**4 SPLIT** | Allows the user to select one or more pages of the existing document to split off and create a new document.

**5 ZOOM IN** | Zooms in on the document. This does not change the dimensions of the document.

**6 ZOOM OUT** | Zooms out on the document. This does not change the dimensions of the document.

**7 THUMBNAIL VIEW** | Displays all pages of the document in the Viewer window as thumbnails. This allows document pages to be rearranged (drag and drop) or deleted.

**NOTE:** Page deletion in the thumbnail view is permanent; single pages that are deleted within the thumbnail view cannot be recovered. Thumbnail view is intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.

8 **SHOW/HIDE ANNOTATIONS** | Toggles on/off the display of annotations in the Viewer.

**NOTE:** Users can view annotations on a Content document within the Etrieve Central document Viewer. Annotations that have been added to a document are accessible without the user needing to click on the View in Source button.

9 **VIEW WITHOUT REDACTIONS** | Allows users with the appropriate permission to view the unredacted copy of a document with redactions. This icon will not display on documents where no redactions have been added.

**NOTE:** When reviewing a document in 'Unredacted Mode' a red banner will display at the top of the document.

10 **ANNOTATION TOOLS** | Toggles on/off the display of the annotation toolbar. The tools available on the annotation toolbar are:

- A **Note** | Creates an electronic sticky note on the document. Resize by dragging and dropping an edge or corner of the note. Double click inside the note to add text.
- B **Highlight** | Highlights a selected area with yellow, grey, red, purple, pink, green, blue, or orange. Select the color using the down arrow at the bottom of the icon.
- C **Freehand** | Allows users to write on the document using the cursor. Select the color using the down arrow at the bottom of the icon.
- D **Rectangle** | Creates a solid black rectangular box over a selected area. Resize by dragging and dropping an edge or corner of the rectangle.
- E **Rubber Stamp** | Places a rubber stamp with the current date and username embedded into the stamp. The down arrow is used to select the type of stamp by clicking the down arrow at the bottom of the icon. Available stamps include: Approved, Paid, Deleted, Denied, Duplicate, Final, Official, Processed, Received, Reviewed, Unofficial, and Verified.

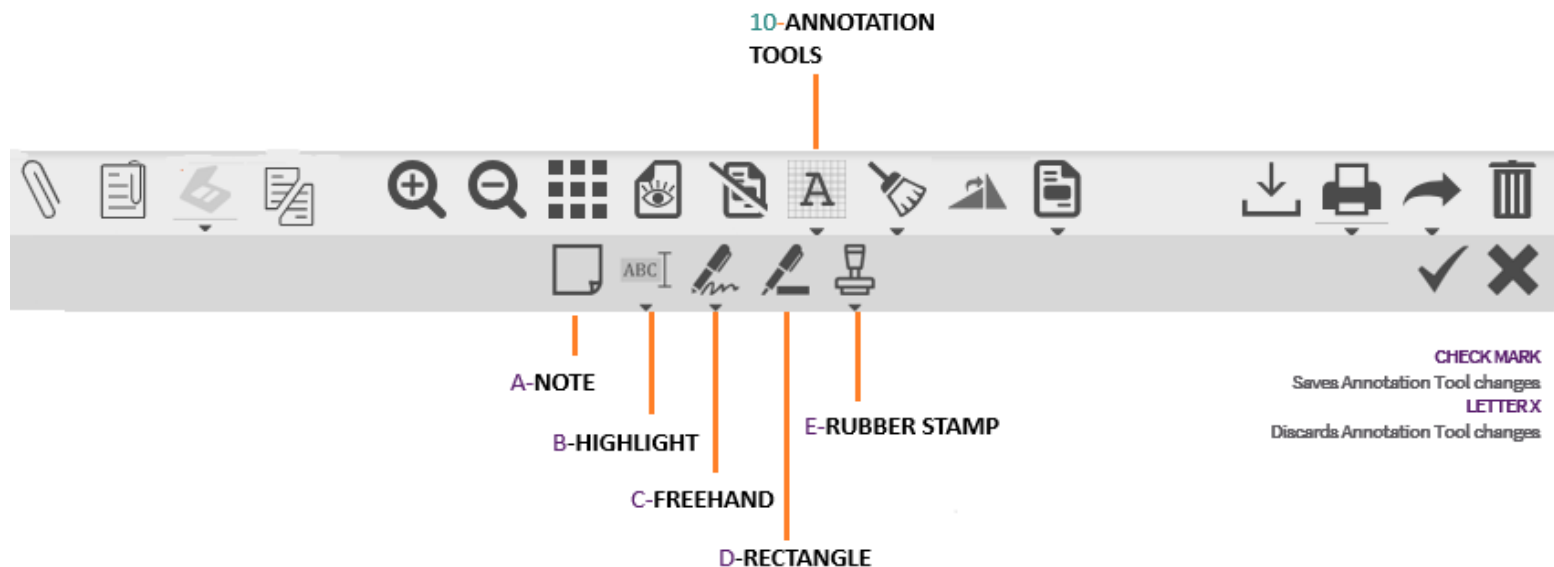


FIGURE 1.18 Annotation Tools

**QUICK TIP:** Use Control Plus (Ctrl+) and Control Minus (Ctrl-) to adjust the size of the entire browser window.



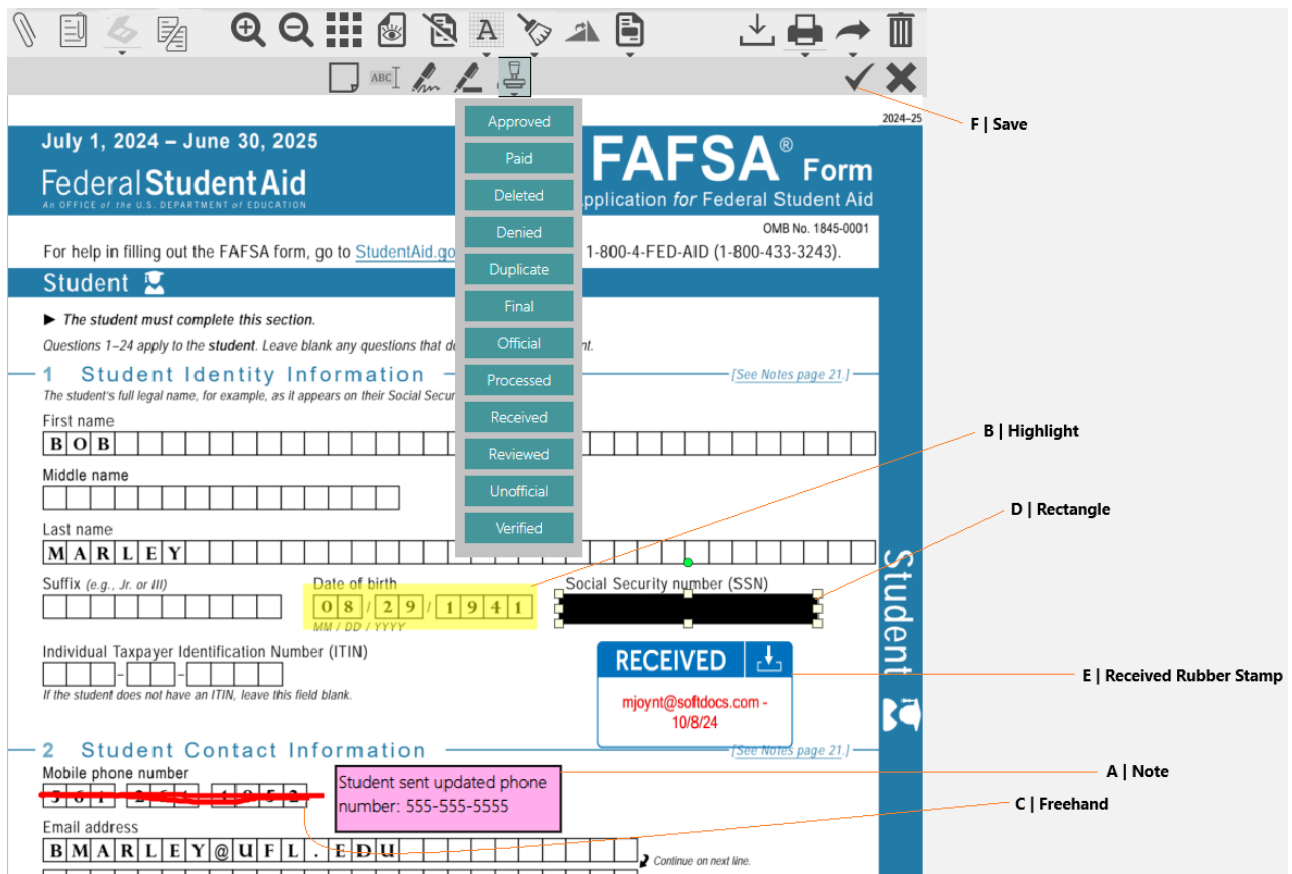


FIGURE 1.19 Illustration of Annotation Tool

## NOTES |

- 1 Unsaved Annotations Tool actions are not automatically discarded when the user attempts to navigate away from the document. A warning panel is presented, and the user must select either Save or Discard.
- 2 Adding annotations is intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.

**11 CLEANING TOOLS |** Toggles on/off the display of the document cleaning toolbar. The tools available on the document cleaning toolbar are:

- A **Adjust BrightnessX%** | Adjusts the appearance of a document by changing its brightness. May be adjusted positive or negative. Click the lamp icon to apply.
- B **Adjust Contrast X%** | Adjusts the appearance of a document by changing its contrast. May be adjusted positive or negative. Click the contrast icon to apply.
- C **Invert Color** | Reverses the colors within the document like a photographic negative.
- D **De-speckle** | Removes speckles on the document image (black and white images only).
- E **Remove Hole Punches** | Removes hole-punches from the left margin (black and white images only). Rotate the page if the hole punches aren't in the left margin.
- F **Remove Borders** | Eliminates the borders on the document image (black and white images only).
- G **Crop Margins** | Adjusts the edges and size of the document image.
- H **Auto De-skew** | Automatically adjusts the angle of the document to correct a skewed scan.
- I **Rotate** | Rotates the angle of a document by the number of degrees entered. May be adjusted positive or negative.

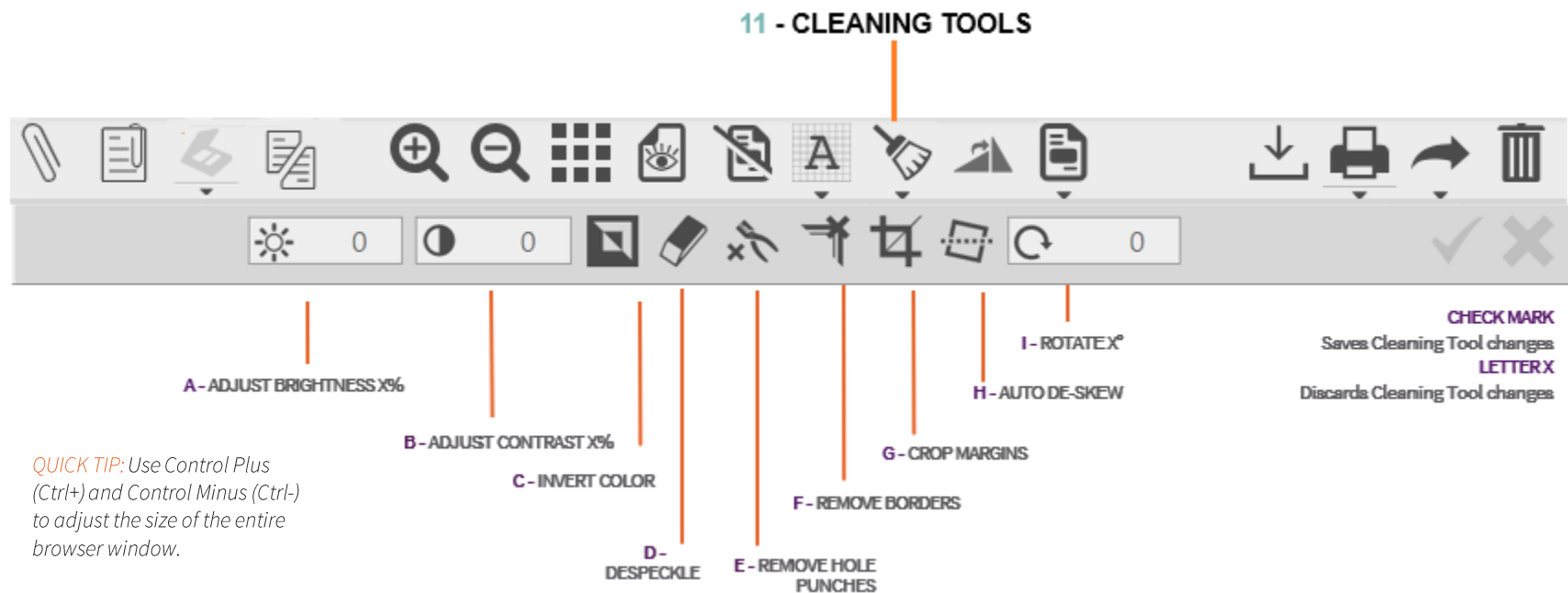


FIGURE 1.20 Cleaning Tools

#### NOTES|

- 1 Brightness, Contrast, and Rotate icons must be clicked to apply any values entered. Despeckle, Remove Hole Punches, and Remove Borders will convert a color or greyscale document to black and white.
- 2 Cleaning Tools will be disabled after permanent redactions have been added to a document so any Cleaning Tool actions should occur before applying redactions.
- 3 Unsaved Cleaning Tool actions are not automatically discarded when the user attempts to navigate away from the document. A warning panel is presented, and the user must select either Save or Discard.
- 4 The document cleanup tools are intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.

**12 ROTATE 90° CLOCKWISE** | Rotates the document 90° clockwise with each click. This does not require a save. This tool can be used by users with View-only permission to rotate a document in the Viewer, while other tools remain unavailable to use.

**13 Redaction Tools** | Toggles on/off the display of the redactions toolbar. For users without the necessary permissions, icons on this toolbar will be grayed out and unavailable. The tools available on the annotation toolbar are:

- A Create** | Creates a permanent solid black box over a selected area. Multiple redactions can be added at once. Right clicking on a redaction while in Create mode will add a new redaction.
- B Move/Resize** | Adjusts the size and location of a redaction on the page.

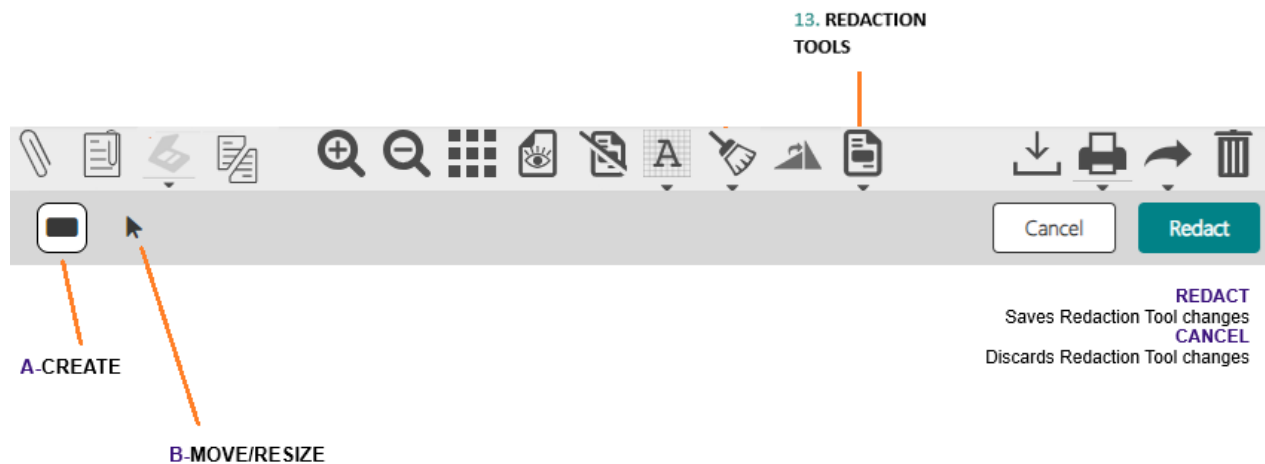


FIGURE 1.21 Redaction Tools

#### NOTES |

- 1 Unsaved Redaction Tool actions are not automatically discarded when the user attempts to navigate away from the document. A warning panel is presented, and the user must select either Save or Discard.
- 2 Adding redactions is intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.
- 3 Certain actions, such as document splitting and image cleaning will become disabled after redactions have been applied on a document.

**14 DOWNLOAD MANAGER** | Downloads the document to the user's local workstation. Documents may be downloaded with or without annotations.

**NOTE** | All Microsoft Office documents will be downloaded into a zipped folder when Download or Print is selected.

**15 PRINT** | Prints the document to a printer that is accessible by the local workstation. Any documents linked together may be printed together. To do this, click the arrowhead below the Print icon and check the box for Include Linked Documents.

**NOTE** | Printing is intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts to print a protected PDF.

**16 SHARE** | This option allows users to email a link to the document in the Viewer or allows the user to select and save the link for either a specific document or specific search criteria. With either option, if the user receiving the email or opening the link is not currently logged into Etrieve with their default web browser, they will first be presented with the login page. After successful login, the document or the new search results will be displayed in the Tree as appropriate.

Users may email a link to a document (not the document itself). The receiving party may view the document only if the recipient is an Etrieve Content user with permission to view the Document Type. To send the link, users must first load the desired document into the Viewer, then click the arrowhead below the Email icon to display a simple email panel. In the 'To' (recipient's) field, start typing part of the desired recipient's name to begin displaying a list of Etrieve users.

Alternatively, users may enter an email address in the format of person@emaildomain.edu. Any other entry besides this (or selecting from the list as described above) will cause failure of delivery for the email. The Direct Links option will

display the link for a search, and when a document is in the Viewer, a link to the current document. A link for a search allows the user to save this link as a bookmark or as a shortcut. When the link is selected, the search will again be executed in Etrieve and the search results displayed in the Tree. As with the email option, the user executing the search will have access only to those documents to which they have permissions. A link to a specific document is similar to the link sent in the Email option. Like the saved link for a search, this link can be bookmarked or saved as a shortcut to quickly navigate directly to the document.

**NOTE** In Figure 1.22 b the letters "mi" have been entered, which displays all internal users who have the letter sequence "mi" as any part of his or her name.

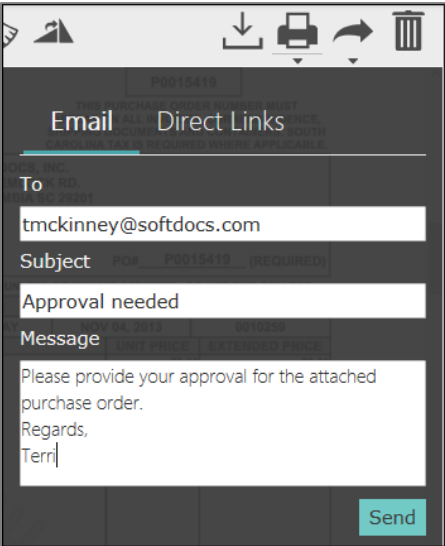


FIGURE 1.22 a Email

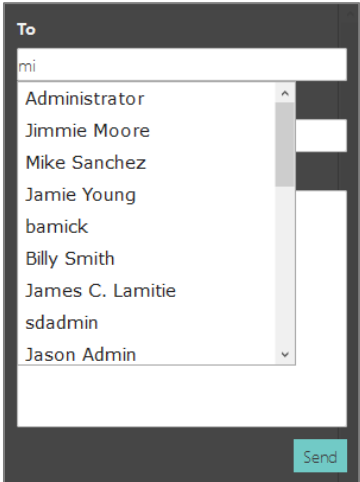


FIGURE 1.22 b Filter names with 'mi'

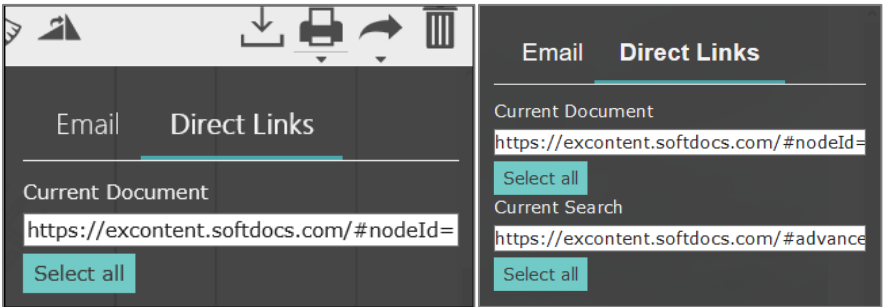


FIGURE 1.22 c Direct Links

**NOTE |** In order for an email message to be sent out of the user's email domain, Etrieve must be configured to allow email relaying. This configuration typically occurs during installation.

**17 MOVE TO RECYCLE BIN |** Deletes the document in the Viewer, sending it to the Recycle Bin, where it can be restored by a user with the necessary permissions or purged by an administrator.

### 1.5.2 Protected PDFs

Etrieve Content supports protected and e-signed PDF files, along with a suite of tools for users and administrators to manage, view, and transfer protected PDFs. Protected PDFs include password-protected PDFs, encrypted PDFs, and e-signed PDFs. The Viewer will visually indicate when a user is viewing a protected PDF by displaying a lock icon and text to the left of the Document Viewer action bar. Protected PDFs are stored in Content in their original format.

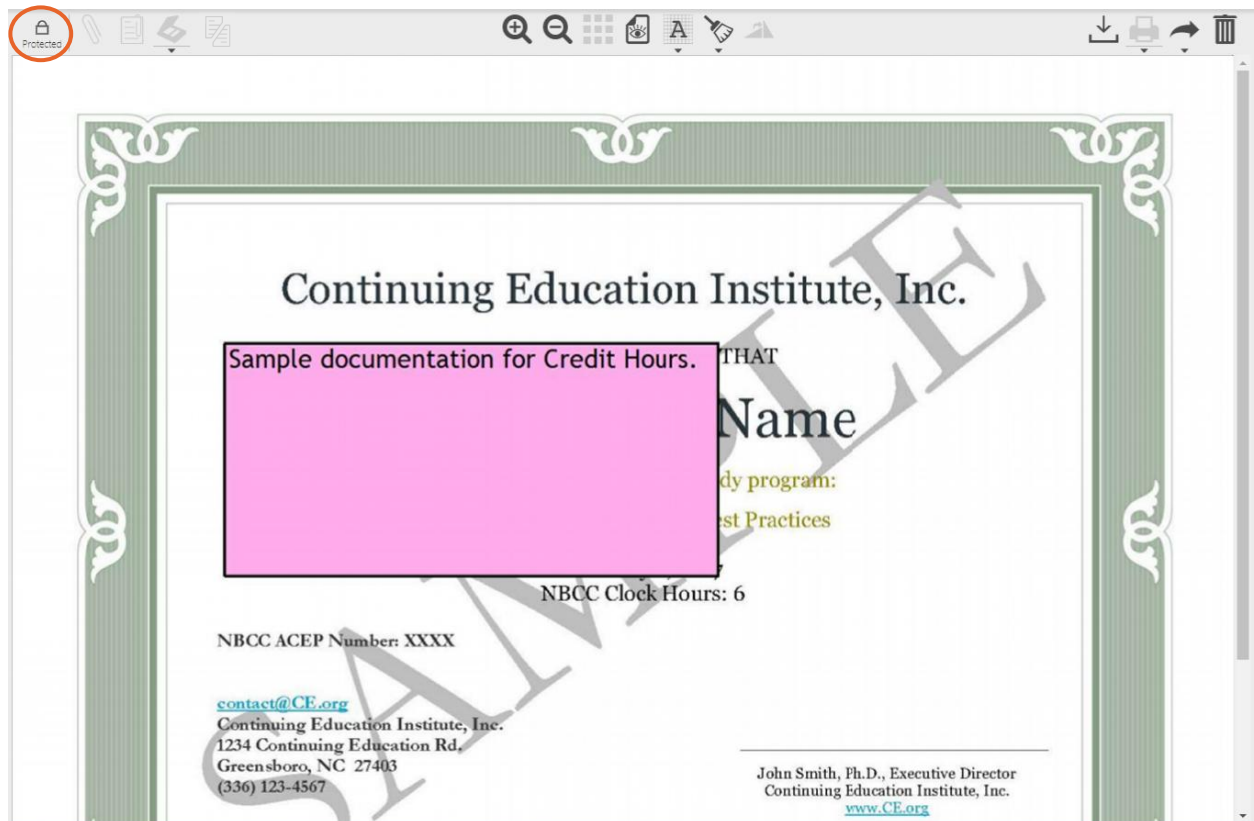


FIGURE 1.23 Protected Lock Icon on Protected PDF

Password-protected PDFs require the password to be entered before the document will be displayed in the Viewer. Entering an incorrect password will prevent the document from displaying.

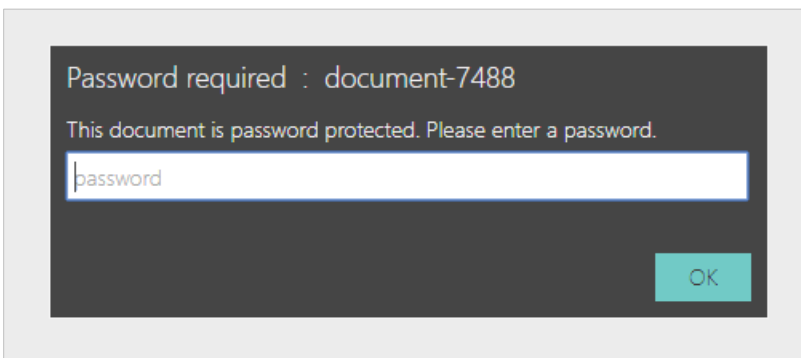


FIGURE 1.24 Password Prompt for Protected PDF

When viewing a protected PDF, a number of features in the Viewer are intentionally disabled. This includes adding annotations, attaching a protected PDF to an existing document, using the document clean up tools, performing document merges, and printing password-protected PDFs. A tooltip displays whenever a user attempts any of these disabled actions.

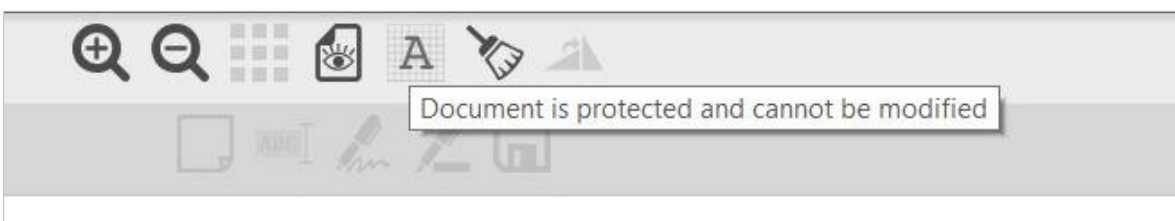


FIGURE 1.25 Tooltip for Disabled Actions on Protected PDF

**NOTE** | Content has support for web browser password managers for Chrome, Firefox, and Safari. When viewing a password-protected PDF on these browsers, Etrieve will communicate with the browser when the browser asks if the user wants to store their password for accessing the document. Microsoft Edge Chromium does not support saving document passwords.

### 1.5.4 Attach, Add Pages, and Scan

As previously mentioned, users may bring new documents into Etrieve by either using Attach, Add Pages, or Scan. Users may control initial filing behavior when Attaching or Scanning by either:

- ▶ Selecting an Area in the filing Tree
- ▶ Selecting a Cabinet, Drawer or Folder in the filing Tree
- ▶ Selecting a document in the filing Tree

If an Area is selected, the document brought into Etrieve will arrive in the Area's Unfiled Documents location (key fields will need to be completed to finish filing the document):

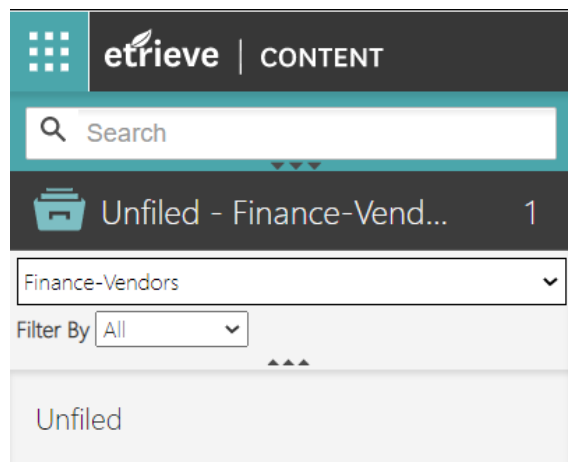


FIGURE 1.26 Unfiled Documents by Area

If a Cabinet, Drawer or Folder is selected, the document brought into Etrieve will arrive in the selected Cabinet, Drawer or Folder, with the designation of “Unnamed” (key fields will need to be completed to finish naming the document):

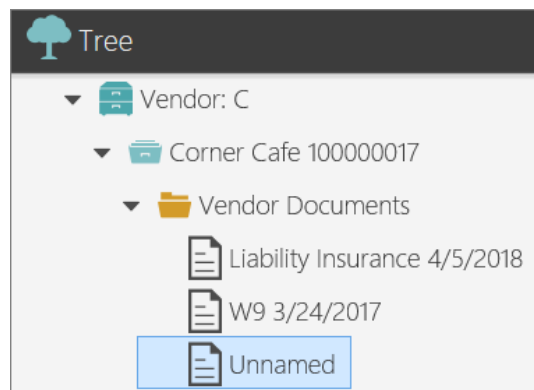


FIGURE 1.27 Unnamed Document in Folder

- 1 **ATTACH** | When the Paperclip icon is clicked in the Viewer, Etrieve is instructed to locate a document to bring into the Viewer. A standard Windows File Explorer panel is launched, and the user may now browse to the desired location and click Open to complete the Attach process.

**NOTE** | The attach icon will be disabled until an Area, Cabinet, or Folder is selected in the Tree.

- 2 **ADD PAGES** | When the Attach Pages icon is clicked in the Viewer, Etrieve is instructed to locate a document to attach pages to a document which is already in the Viewer. If a document is selected, the attached image will be



added (appended) to the end of the current document image.

**NOTE** | Attaching a protected PDF to an existing document is intentionally disabled. A tooltip will display whenever a user attempts any disabled actions.

- 3 **SCAN** | When the Scan icon is clicked in the Viewer, scanning will commence without allowing the user to make changes to scanner settings. This may or may not be the desired action. If a document is selected, the scanned image will be added (appended) to the end of the current document image.

When the small arrowhead under the Scanner icon is clicked in the Viewer, the Scanner panel opens, where users may make several selections about how the document to be scanned will be handled (the selections for Scanner, Feeder, Brightness and Contrast are rarely changed). Scanning settings are saved when they are changed.

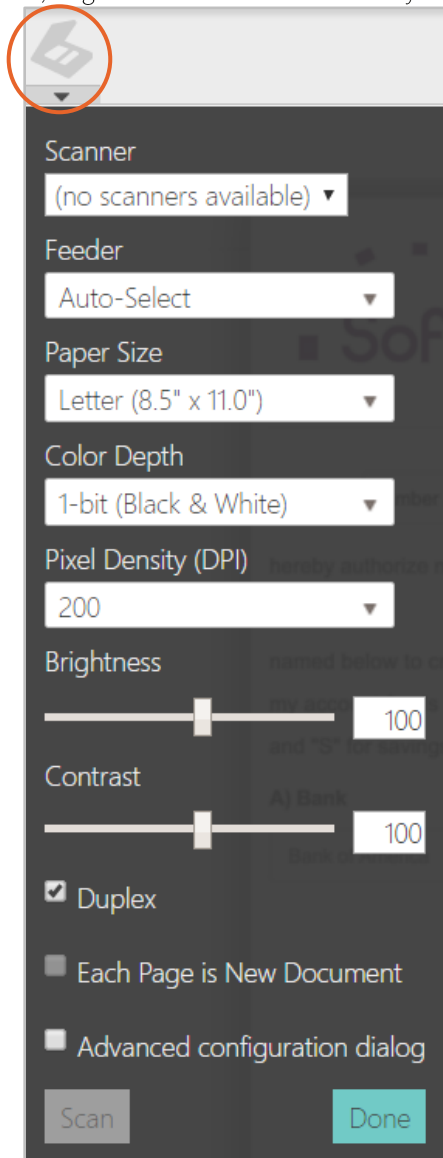


FIGURE 1.29 Scanner Settings

- ▶ Paper Size – Users may select one of four paper sizes. Normally, it is best to sort documents to be scanned by paper size.

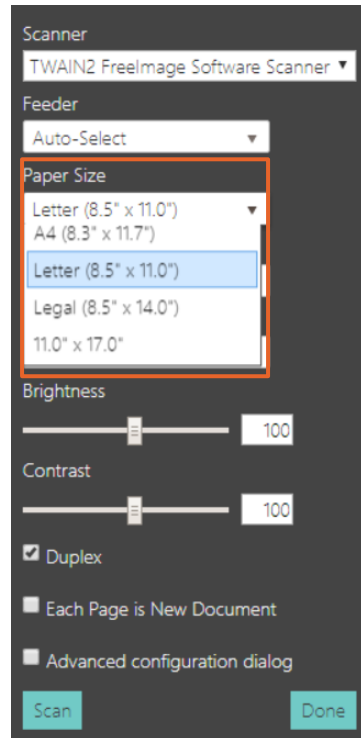


FIGURE 1.30 Scanner Paper Size Options

- ▶ Color Depth – Users may select one of three color depths. The higher the value selected, the more space the document will consume in the document image repository. 1-bit is usually acceptable for black & white documents with no shades of gray, but 8-bit grayscale may produce a better image. 24-bit color is required for images where it is necessary to preserve colors in documents (including possibly colored paper stock).

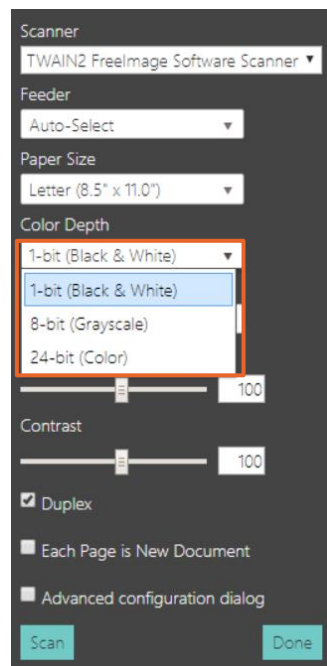


FIGURE 1.31 Scanner Color Depth

- ▶ Pixel Density – Users may select one of several pixel densities. A higher value for pixel density generally produces a sharper scanned image, but it also consumes more space in the document image repository. Usually, a value between 200 and 300 will produce acceptable results.

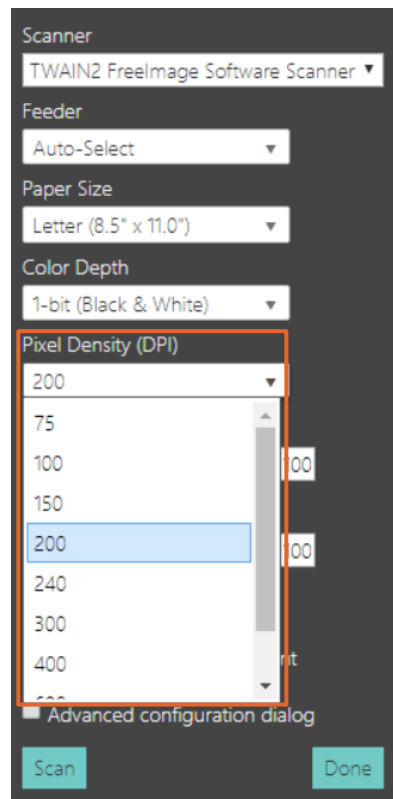


FIGURE 1.32 Scanner Pixel Density (DPI)

- ▶ Duplex – If the duplex box is checked, this instructs the scanner to scan both the front and the back of the document in a single pass. If it is unchecked, only the front of the document will be scanned.  
  
Most document scanning software is able to detect if the back of a document is blank and will not add the blank page to the scan.  
  
However, if a highlighter has been used on the document, or if there are stains on the document which have bled through to the back, having duplex checked will cause the unwanted back of the document to be scanned. Users may use the Thumbnail View after scanning to locate and delete these unwanted pages.
- ▶ Each Page Is New Document – Checking this box will force the scanner to treat each page in a packet of scanned documents as separate documents.
- ▶ Advanced Configuration Dialog – If this box is checked, the user has the ability to configure settings for the specified scanner through the third parties User Interface. These settings are saved per user.

**NOTE** | Softdocs recommends using the Fujitsu Paperstream scanning software. Once the box is checked, the Etrieve configuration settings will minimize and this will become the only available option. To expand the other options, simply uncheck the check box.

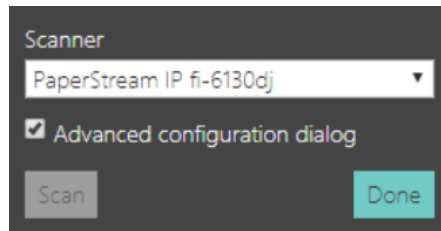


FIGURE 1.33 Advanced Configured Dialog Scanner Page

The Third Party (PaperStream®) configuration settings will appear and can then be manipulated. To access the configuration settings for PaperStream®, select the two opposite facing arrows in the top right corner. The Settings Dialog will appear and can be configured.

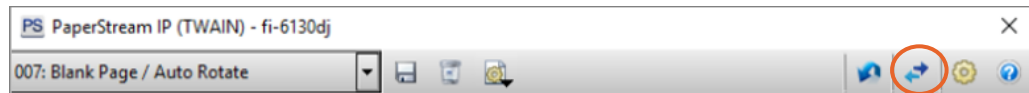


FIGURE 1.34 Scanner Advanced Options

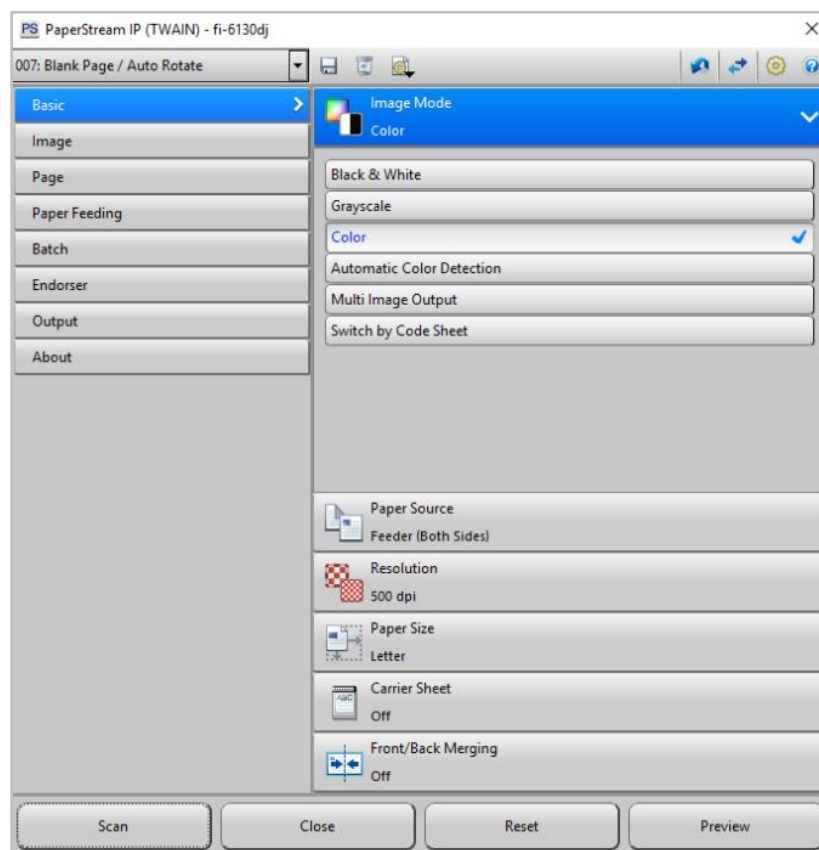


FIGURE 1.35 Scanner Advanced Options Page

- ▶ Image Mode – Users may select which color selection matches the document that is being scanned in to the system.
- ▶ Paper Source – Determines which tray of the scanner is being utilized.
- ▶ Paper Size – Users may select one of four paper sizes. Normally, it is best to sort documents to be scanned by paper size.
- ▶ Carrier Sheet – The user may turn this feature on when the document being scanned is not of standard shape or size.

- ▶ Front / Back Merging – Automatically combines two images into one. Can take two separate images or the front and back of a page and combine into one single page image. Used for endorsed checks, Drivers Licenses, etc.

### 1.5.5 Document Split

This Split feature provides the capability of splitting a single document into multiple documents. This can be used to split a batch of different documents which were scanned in as a batch.

When the Split icon is clicked in the Viewer, Etrieve opens a new page where the user can select one or more pages of the existing document to split off and create a new document.

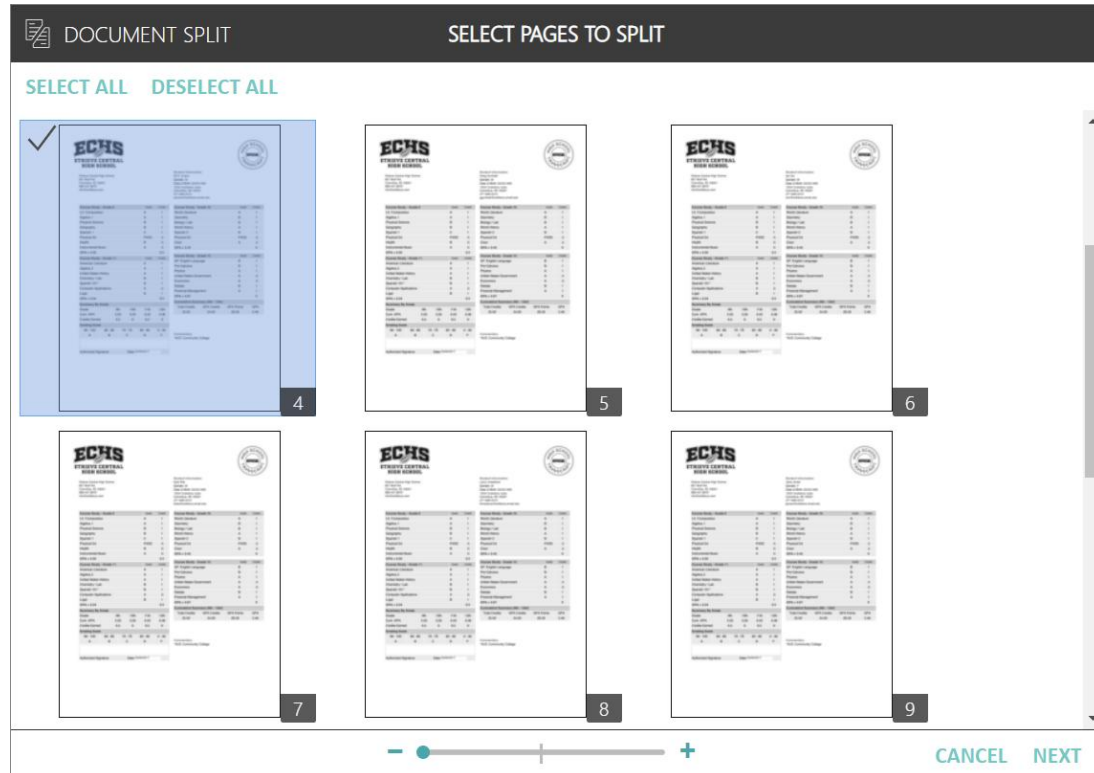


FIGURE 1.36 Document Split Screen

The Next button at the bottom right of the page must be selected to continue on to the next step of the Split process—populating Key Field information.

FIGURE 1.37 Document Spilt Verify Pages and Select Document Type

At a minimum, the user will have to select a Document Type but additional information can be optionally filled in per user requirements before being allowed to click the Split button at the bottom. At this point, a final dialog box will display before the operation is finalized.

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FIGURE 1.38 Document Split Confirmation

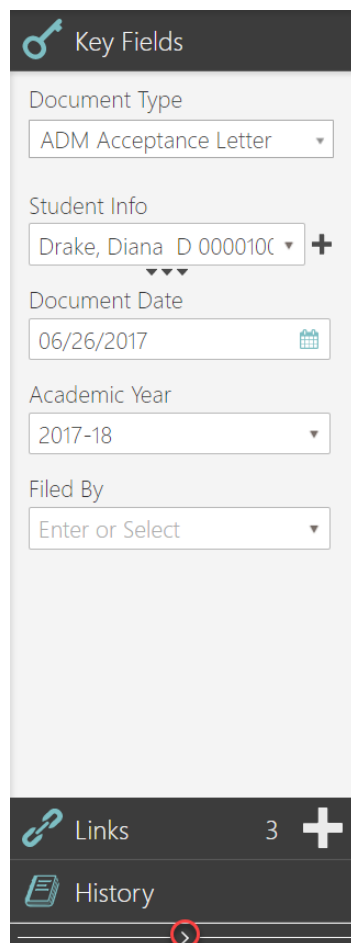
Selecting Cancel will cancel out of the operation. Selecting one of the other two options will kickoff the Split document operation. Upon successful splitting of the document, the user will be taken to the location that is indicative of the option selected.

- ▶ Yes and continue splitting – back to the starting Split Document popup dialog box and the pages which were just split out into a new document will no longer display. Pages cannot be split into more than one new document. The user is allowed to continue splitting the original document into more new documents, using the same procedure outlined.
- ▶ Yes and complete – completely out of the Split operation to the normal document view.

On the original document that was split, document history will display that a document was Split Update and the new documents' history will display Split Create.

## 1.6 Index Panel

The Index Panel has three sections: Key Fields, Links, and History. It may be collapsed into a “sidebar” menu to increase the main document Viewer by clicking the small gray arrowhead (>) at the bottom of the Key Fields panel.



The screenshot shows the Index Panel with a dark header bar. The 'Key Fields' section is expanded, showing several input fields: 'Document Type' (dropdown menu with 'ADM Acceptance Letter'), 'Student Info' (dropdown menu with 'Drake, Diana D 000010C' and a plus icon), 'Document Date' (text field with '06/26/2017' and a calendar icon), 'Academic Year' (dropdown menu with '2017-18'), and 'Filed By' (dropdown menu with 'Enter or Select'). Below the Key Fields section are two collapsed sections: 'Links' (with a chain icon, the number '3', and a plus icon) and 'History' (with a document icon). At the bottom of the panel, there is a small gray arrowhead (>) inside a red circle.

FIGURE 1.39 Index Panel

### 1.6.1 Key Fields

There are two types of Key Fields: Document (most common) and Lookup. In their most common usage, they hold data used to search for documents.

Key Fields contain data for indexing, searching, and general referencing of documents. Key Fields may also contain data useful in automations and workflows, such as document status (e.g., Pending, Approved, Open, Closed).

The nature of the Document Type will determine what Key Fields are assigned to it. Obviously, an AP Check Document Type will require different Key Fields than an Admissions Application Document Type, though both of these Document Types would likely share a number of common Key Fields.

After a document has been selected from the unfiled documents and is loaded into the Viewer, it is normally filed by:

- 1 Using the dropdown menu in the Document Type Key Field (always the first Key Field on the list) to select the correct document type, and then,
- 2 Completing the rest of the Key Fields in the panel. A Key Field can be required for two reasons:
  - ▶ It has been marked as a required field by an administrator in Key Field rules, and/or,
  - ▶ It is required for a name definition or a tree filing requirement.

The document will then be automatically filed in the appropriate folder in the Tree when enough Key Field information has been entered.

Lookups are special Key Fields which have multiple Key Fields contained within them. One or more Key Fields in the Lookup are designated as Unique Identifier(s). This is the “anchor” Key Field assigned to the document, used to distinguish this document and its filing location from all others.

A Lookup Key Field may be identified by the fact that it has a bold plus sign (+) to the right and three small arrowheads centered just below. When the user clicks on these arrowheads, the Lookup opens to reveal the subordinate Key Fields which together comprise the Lookup.

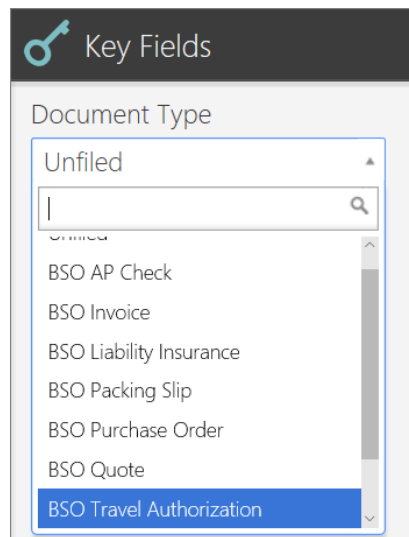


FIGURE 1.40 a Key Fields

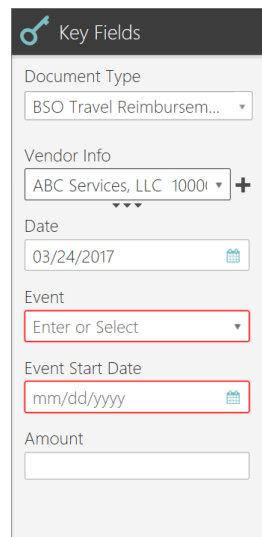


FIGURE 1.40 b Required Key Fields

**NOTE**  
Required Key  
Fields will  
have a red  
border  
surrounding  
the field.

**NOTE |** Lookups may contain multiple versions. A typical reason for this is a change of a person’s last name. The Etrieve user needs to be able to use Search to find a given document using either last name, so both versions of the Lookup should be preserved.

There are three main icons within the Lookup:

- 1 A star icon indicating that this is the default version of the Lookup.
- 2 A document icon which may be clicked to associate this Lookup version to the document being viewed.
- 3 An X which may be clicked to remove the Lookup version. The ability to add or delete Lookups (and values within them) is controlled by administrators in Etrieve Security, so all users may not be able to do this deletion.

The 'Key Fields' interface is shown with a dark header containing a key icon and the text 'Key Fields'. Below the header, there are several sections: 'Document Type' with a dropdown menu showing 'ADM Admissions Applica...'; 'Student Info' with a dropdown menu showing 'Jarratt, Heather 100000' and a '+' icon; a list of student entries with 'Harris, Heather 100000008' and 'Jarratt, Heather 100000008' (the latter has a star icon); 'ERP ID' with a dropdown menu showing '100000008'; 'First Name' with a dropdown menu showing 'Heather'; 'Middle Name' with a dropdown menu showing 'H.'; and 'Last Name' with a dropdown menu showing 'Jarratt'.

FIGURE 1.41 Lookup Key Fields

If the star or document icons are small, this means that this Lookup is the default version and is associated to the document currently displayed in the Viewer. If the star or document icons are large, they may be clicked to make this Lookup the default version or to associate this Lookup to the displayed document. The X will always be large and clickable.

The 'Key Fields' interface is shown with a dark header containing a key icon and the text 'Key Fields'. Below the header, there are several sections: 'Document Type' with a dropdown menu showing 'ADM Letter of Recomme...'; 'Student Info' with a dropdown menu showing 'Iams, Ashley 100000001' and a '+' icon; a list of student entries with 'Adams, Ashley 100000001' (the latter has a star icon); and a tooltip that says 'This is the default version.' pointing to the star icon.

FIGURE 1.42 Lookup Key Fields

If a document is filed in the wrong folder, simply change the data in the Key Field(s), hit the Enter key, or click out of the Key Field box. The document will refile accordingly.

To send a document back to Unfiled documents, select Unfiled from the Document Type Key Field dropdown selection.

## 1.6.2 Links

Links function as “electronic staples,” which allows two or more documents to be linked to each other, either by an automation or by user action. Each linked document will still display separately in the Viewer, but the Links Bar contains the number of linked documents within the section header, and may be clicked to view existing Links. By clicking on one of the documents displayed, the image in the Viewer and the Key Fields list will change, but the tree location will not.

There is a simple three step process to manually link documents:

- 1 Select the first document you want to link in the Tree, then click the large plus sign (+) in the Links bar. It will rotate and change into an X.
- 2 Find and click on the second document in the Tree to which you want to link. The X will change into a check mark (✓).
- 3 Click the check mark, which will change back to the plus symbol. The Link has been created.

To manually unlink documents:

- 1 Find one of them in the Tree, then click the Links bar (which will display the list of linked documents).
- 2 Hover the cursor over the document on the bottom of the list.
- 3 A small Chain icon will appear under this document showing that it is linked. Click on the Chain icon and document will be unlinked.

**NOTE** | Unlinking documents occurs automatically, and without a confirmation prompt. Use caution to avoid unlinking documents in error.

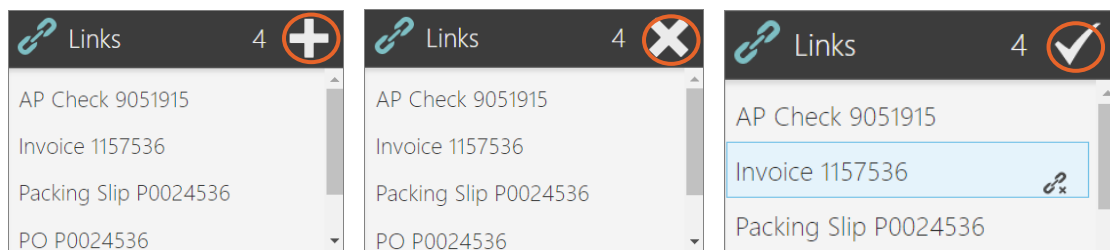


FIGURE 1.43 Links

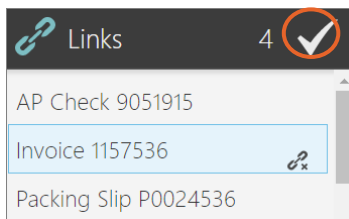


FIGURE 1.44 Remove Links

### 1.6.3 History

When the user clicks the History bar, Etrieve Content displays the record of what actions have taken place on the document currently displayed in the Viewer. The action, the date it took place, and which user took the action are displayed. If the user hovers the cursor over the date, the date and time of the action will popup.

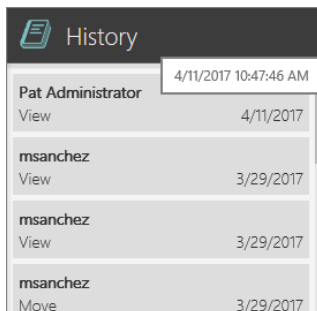


FIGURE 1.45 History