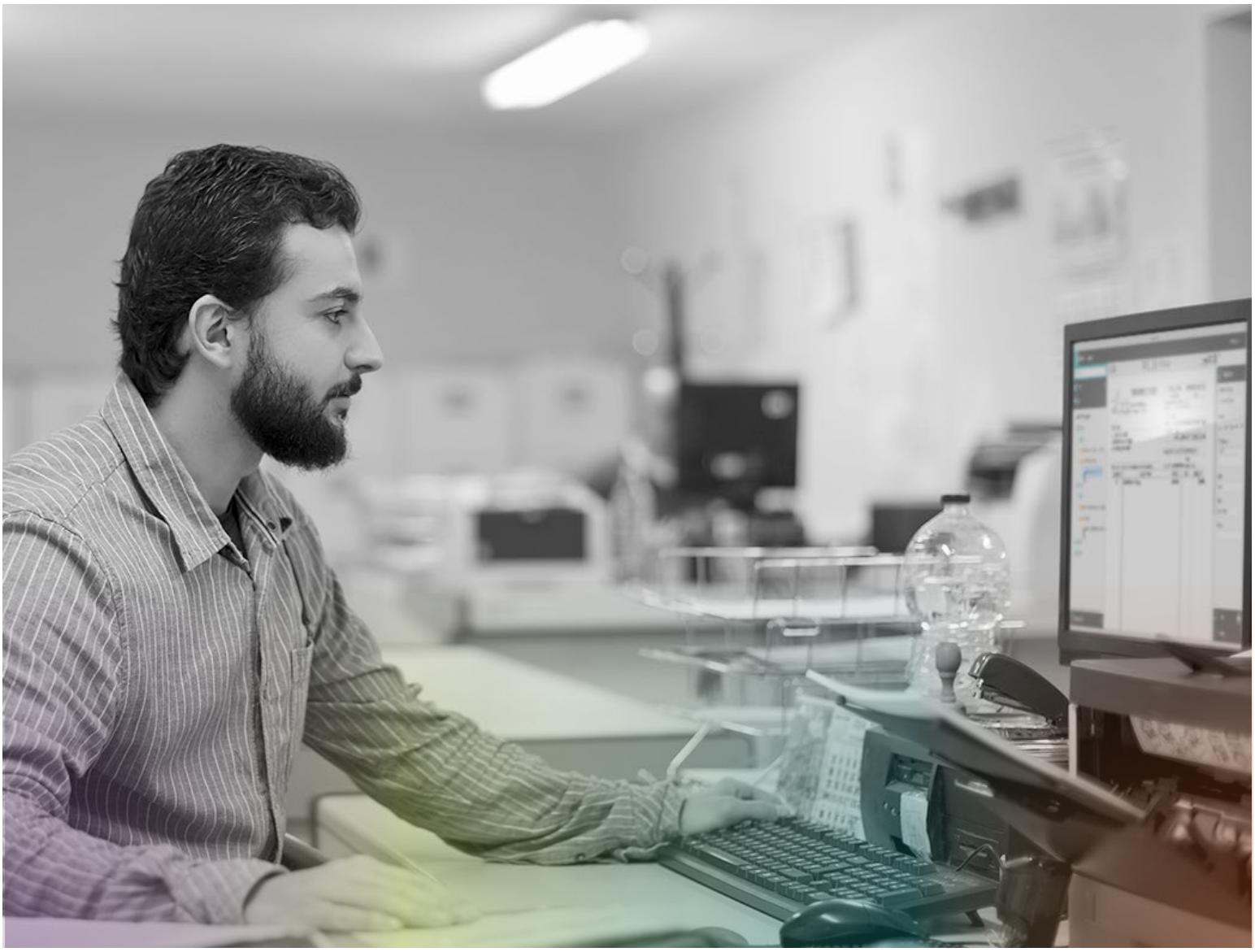
etrieve™
by Softdocs

Content User Guide

VERSION 2020.1



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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
- Mozilla Firefox
- Safari (Mac/iOS)

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

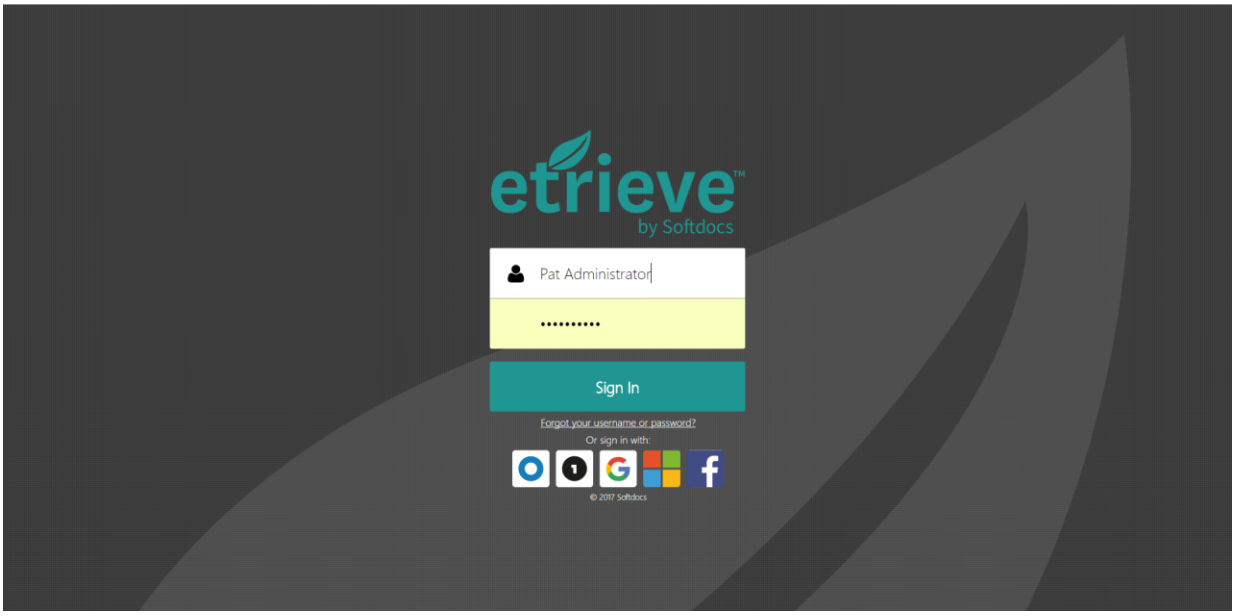


FIGURE 1.1 Etrieve Sign In “Splash” Page

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

The list of possible identity providers will depend on the institution’s particular needs and configurations. An institution may elect to use a single sign-on third-party provider or have an institution’s ‘Branded’ Sign In Page.

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.

After the identity provider is selected, the Sign In page will be presented, prompting for the username and password. Also, your institution may have elected to implement an initial message (such as a FERPA warning) which must be agreed to before logging in.

After the user enters the correct login information and selects the “Sign In” button, the user will then be directed to Etrieve Content.

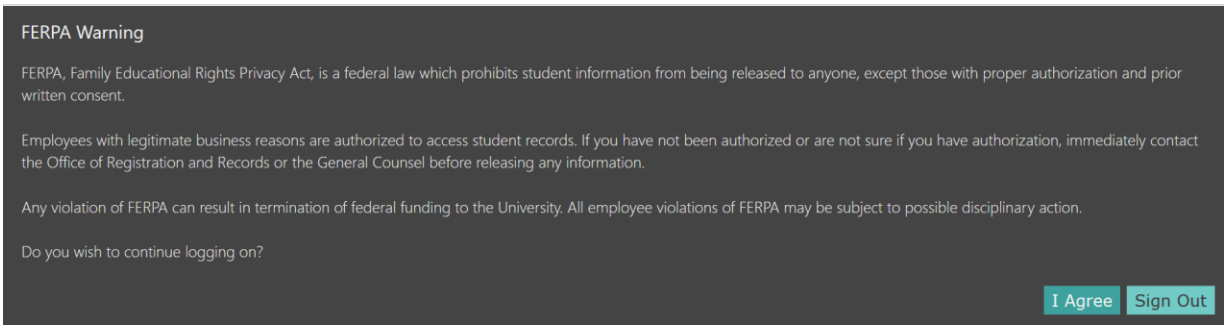


FIGURE 1.2 FERPA Warning Acknowledgement

FIGURE 1.3 Etrieve Sign In Page

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 downloads 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.

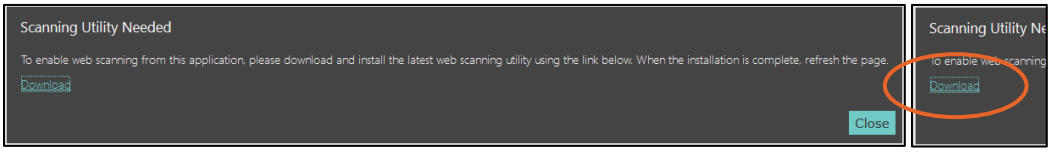


FIGURE 1.4 Etrieve Prompt Scanning Utility Needed

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.

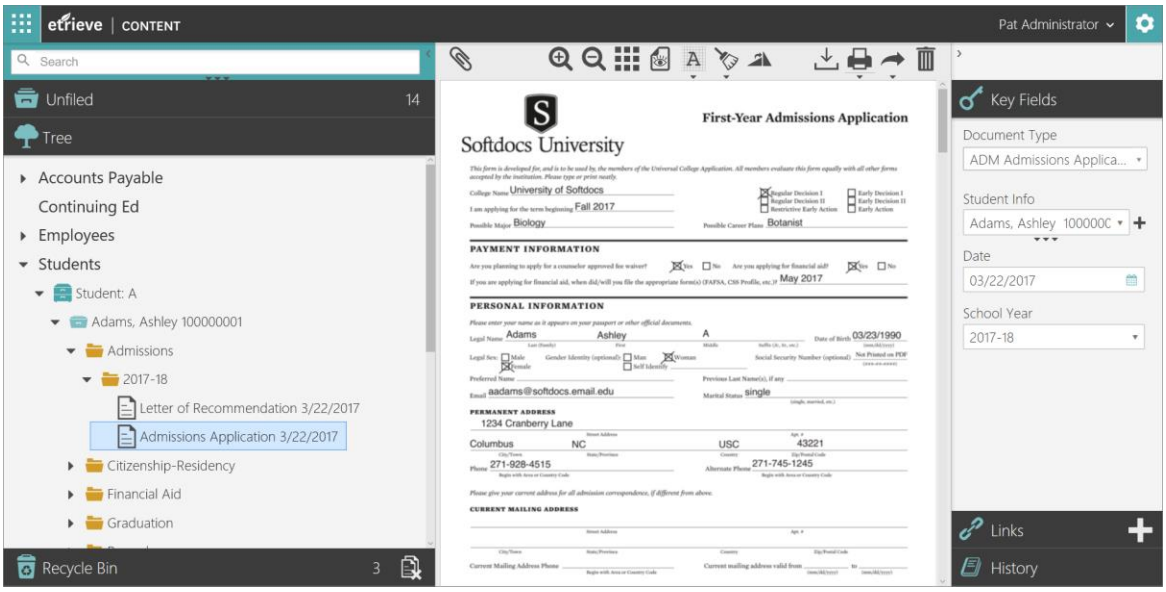


FIGURE 1.5 Etrieve Content Page Layout

1.3 The 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 1.6 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.

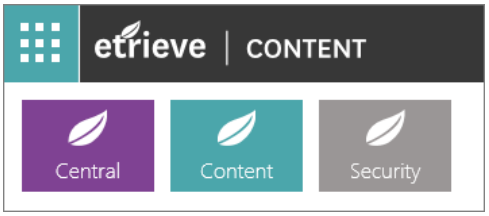


FIGURE 1.7 App Switcher

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 Etrieve Content Page.

FIGURE 1.8 Etrieve | CONTENT

USERNAME | The username of the currently logged in user. Clicking on the username will display a dropdown menu with two options: About and Sign Out. The About screen contains technical information about Etrieve, including the current system version. 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.

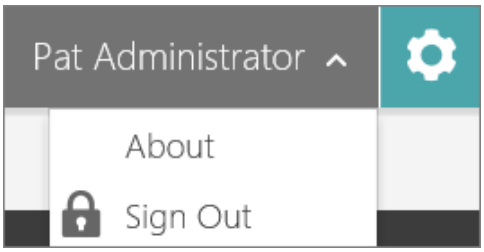


FIGURE 1.9 User Logged-In | The Cog

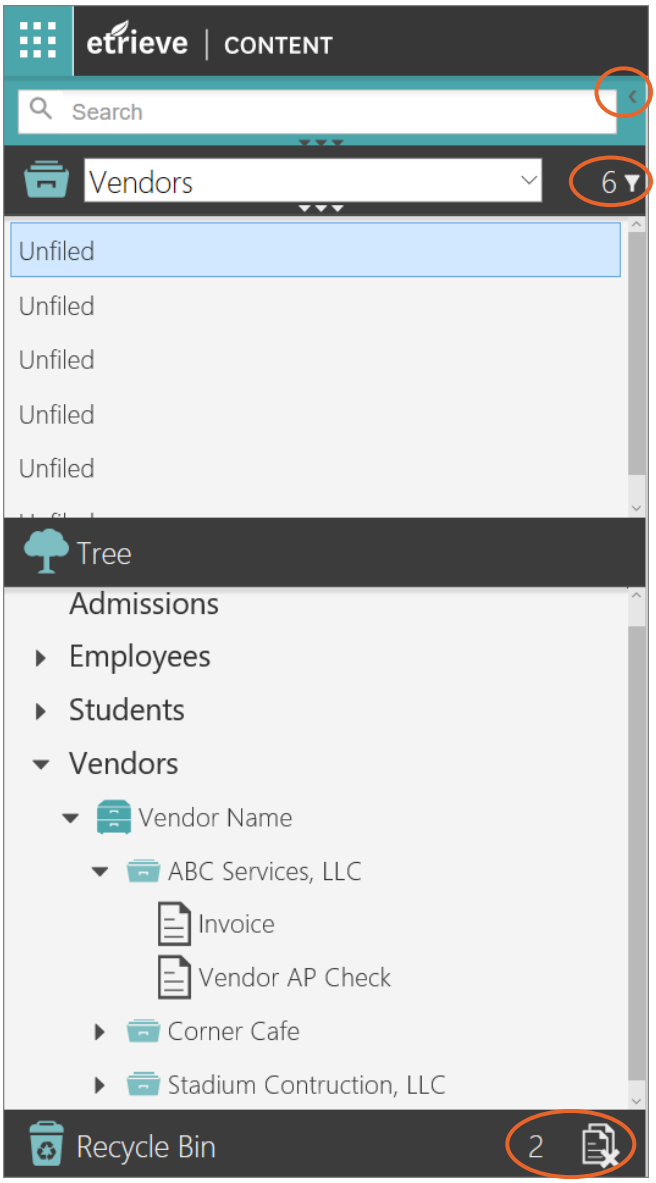
CONFIGURATION MENU ACCESS (THE "COG") | This icon appears only if the user has been granted administrator privileges in Etrieve Content. It allows administrators access to the Etrieve Content administration menus.

1.4 The 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 (<) just to the right of the Search box.

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 1.10 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).

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 a second, third, fourth, etc., Search filter. Search fields will “stack”, and may be deleted if unwanted.

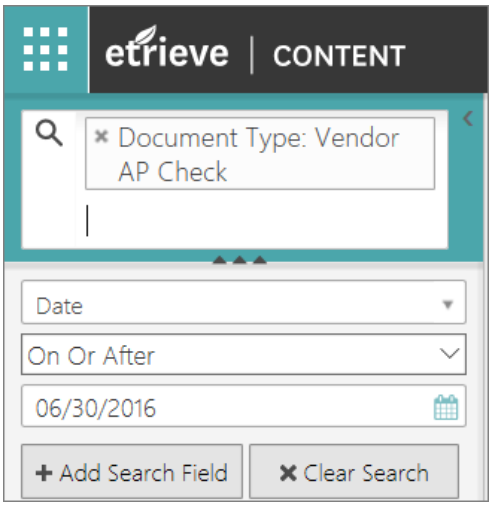


FIGURE 1.11 Advanced Search Feature

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.

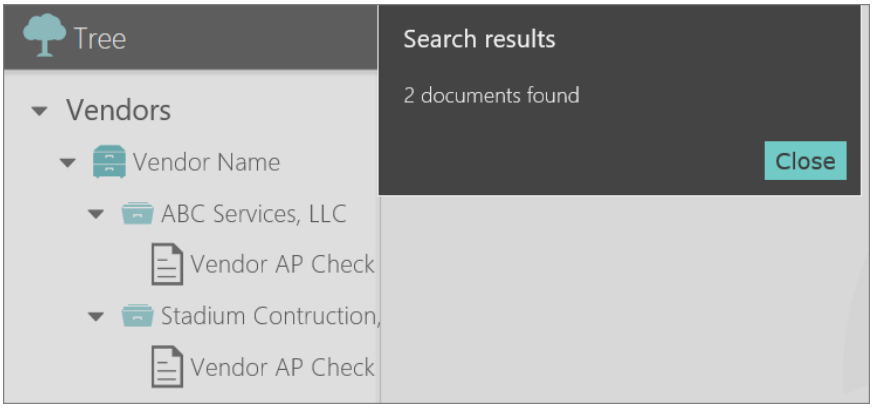


FIGURE 1.12 Document Count Search Results

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.

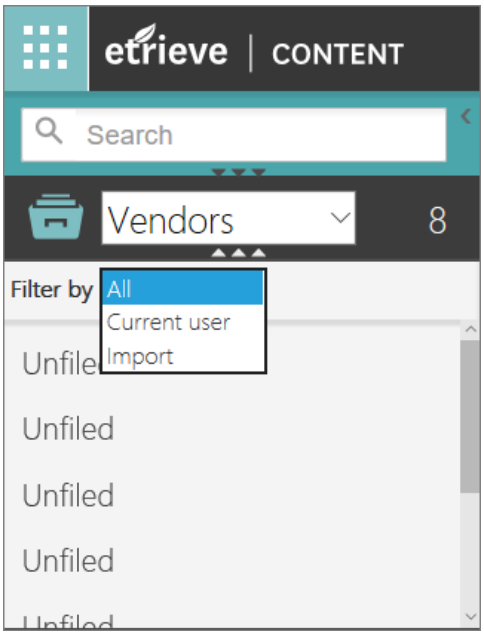


FIGURE 1.13 Unfiled Documents 'Filter by'

1.4.3 The 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.*

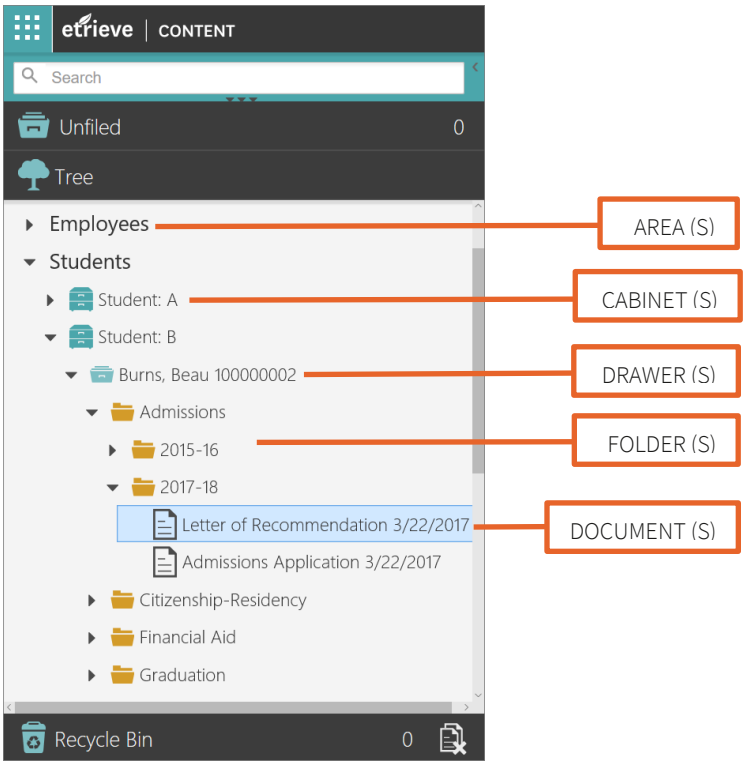


FIGURE 1.14 Tree

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).

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.

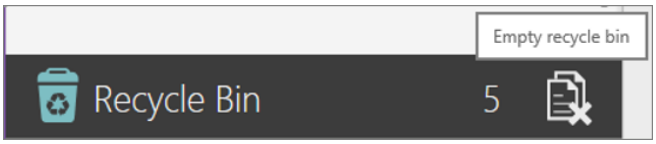


FIGURE 1.15 a Empty Recycle Bin

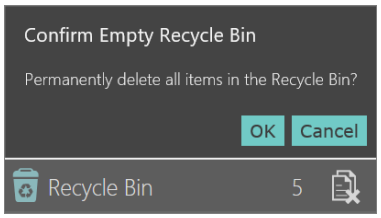


FIGURE 1.15 b Confirm Empty Recycle Bin

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.

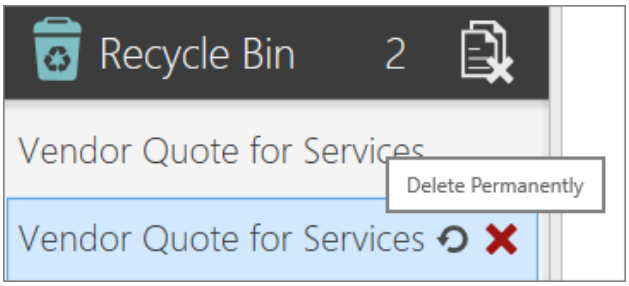
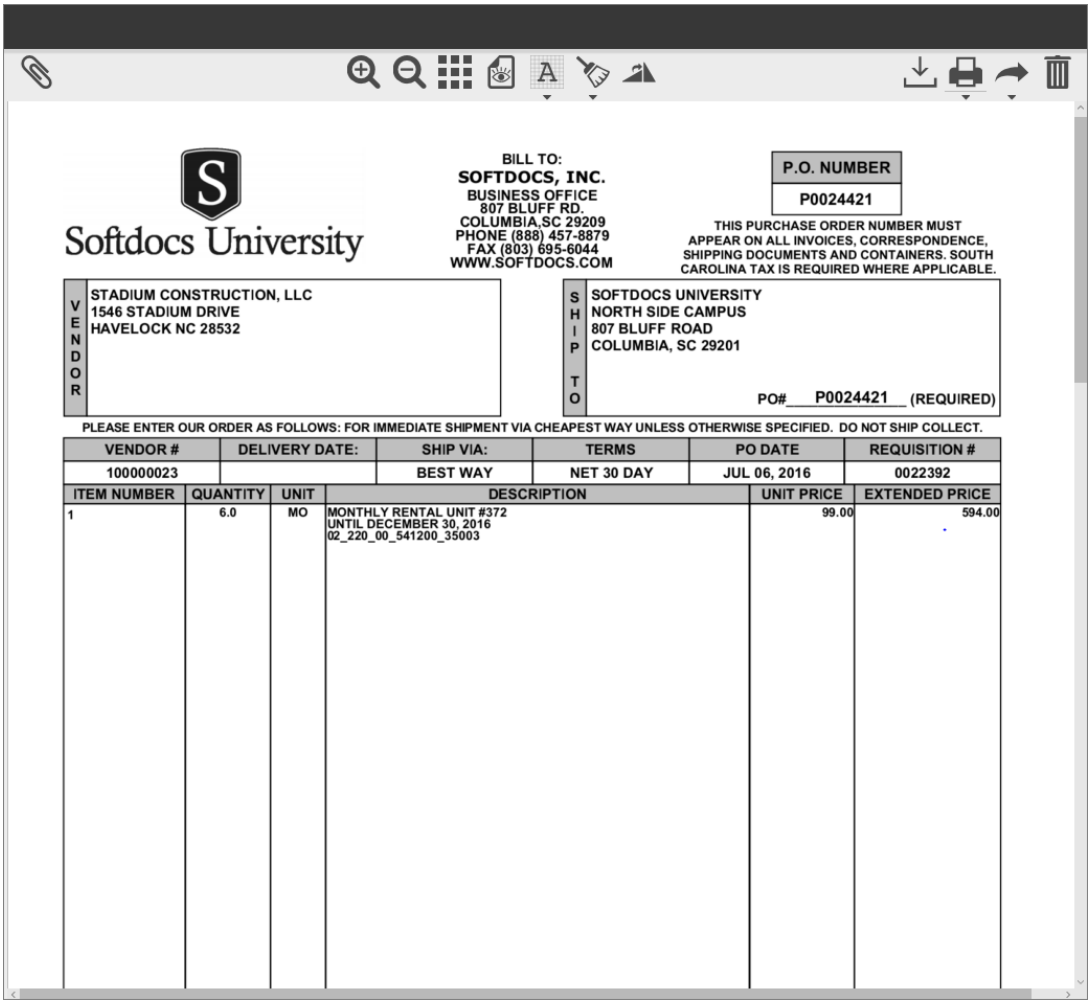


FIGURE 1.15 c Delete Document Permanently

1.5 The 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.



Softdocs University

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FAX (803) 695-6044
WWW.SOFTDOCS.COM

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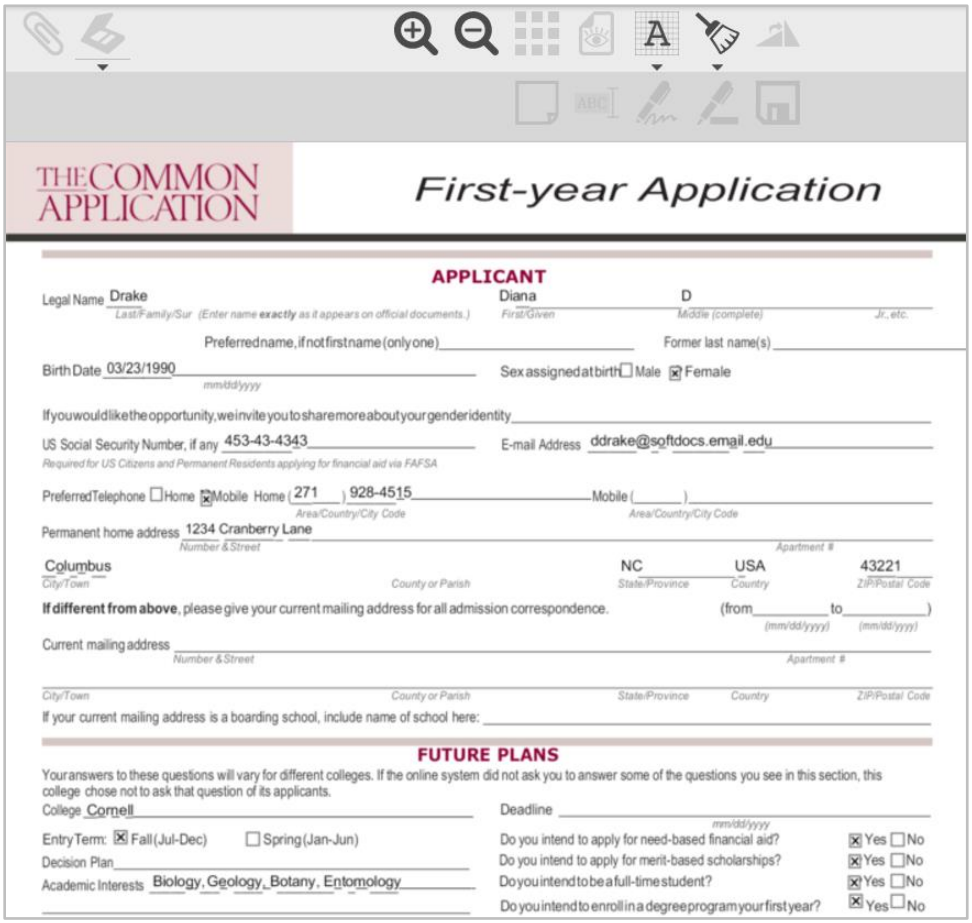
ITEM NUMBER	QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
1	6.0	MO	MONTHLY RENTAL UNIT #372 UNTIL DECEMBER 30, 2016 02_220_00_541200_35003	99.00	594.00

FIGURE 1.16 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, Annotations Toggle, Cleaning Tool Toggle, and Thumbnail view 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 Drake (Last/Family/Sur) (Enter name **exactly** as it appears on official documents.) Diana (First/Given) D (Middle (complete)) (Jr., etc.)

Preferred name, if not first name (only one) _____ Former last name(s) _____

Birth Date 03/23/1990 (mm/dd/yyyy) Sex assigned at birth ☐ Male ☒ Female

If you would like the opportunity, we invite you to share more about your gender identity _____

US Social Security Number, if any 453-43-4343 E-mail Address ddrake@softdocs.email.edu

Required for US Citizens and Permanent Residents applying for financial aid via FAFSA

Preferred Telephone ☐ Home ☒ Mobile Home (271) 928-4515 (Area/Country/City Code) Mobile (_____) (Area/Country/City Code)

Permanent home address 1234 Cranberry Lane (Number & Street) (Apartment #)

Columbus (City/Town) (County or Parish) NC (State/Province) USA (Country) 43221 (ZIP/Postal Code)

If different from above, please give your current mailing address for all admission correspondence. (from _____ to _____) (mm/dd/yyyy) (mm/dd/yyyy)

Current mailing address _____ (Number & Street) (Apartment #)

(City/Town) (County or Parish) (State/Province) (Country) (ZIP/Postal Code)

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 Deadline _____ (mm/dd/yyyy)

Entry Term: ☒ Fall (Jul-Dec) ☐ Spring (Jan-Jun)

Decision Plan _____

Academic Interests Biology, Geology, Botany, Entomology

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

FIGURE 1.17 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:

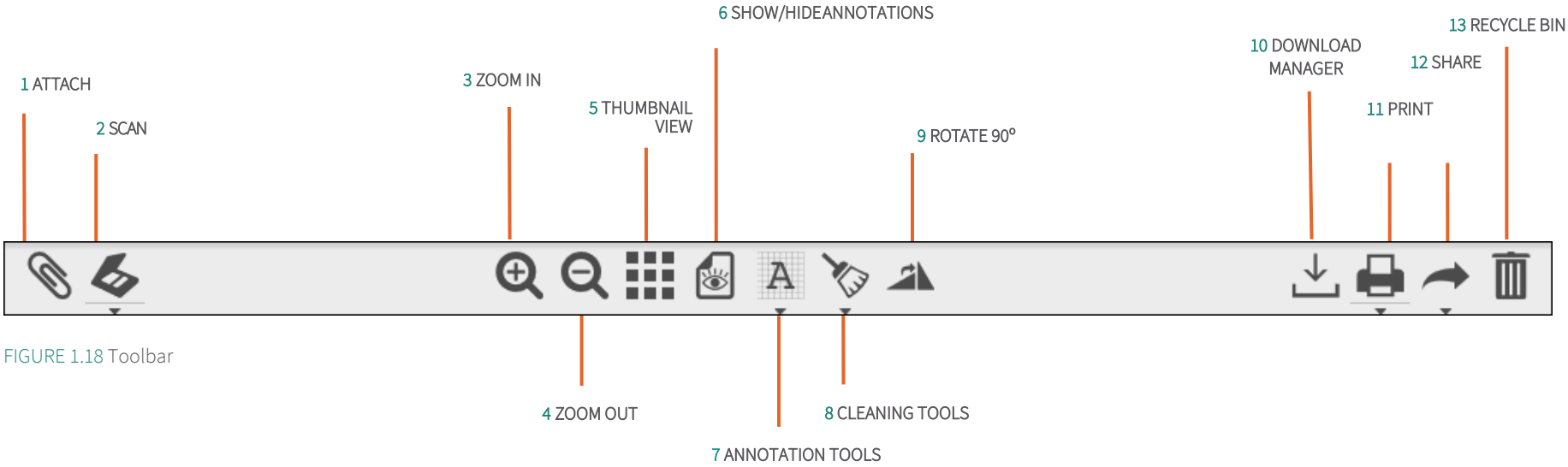


FIGURE 1.18 Toolbar

1 ATTACH | Allows the user to import a page or document either into an Area's Unfiled Documents or folder, or to append pages to a document open in the Viewer.
NOTE | Attaching a protected PDF to an existing document is intentionally disabled. A tooltip will display whenever a user attempts any disabled actions.

2 SCAN | Users with scanning privileges can scan documents into an Area's Unfiled Documents or folder, or append the scanned document to a document open in the Viewer. The user has the ability to utilize Etrieve scanning preferences or to access Third Party preferences through utilizing the advanced configuration settings. Settings are stored per user.

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

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

5 THUMBNAIL VIEW | Displays all pages of the document in the Viewer window as thumbnails. This allows document pages to be rearranged (click and drag) or deleted. NOTE | Page deletion in the thumbnail view is permanent; single pages that are deleted within the thumbnail view cannot be recovered.

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

7 ANNOTATION TOOLS | Toggles on/off the display of the annotation 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 Note | Creates an electronic sticky note on the document.

B Highlight | Highlights a selected area with yellow.

C Freehand | Allows users to write on the document using the cursor.

D Rectangle | Creates a solid black rectangular box over a selected area.

E Rubber Stamp | Provides the ability to select a rubber stamp to place on the document. Each stamp embeds the current date and username into the stamp image.

The following rubber stamps are available in Etrieve:

- *Approved*
- *Deleted*
- *Denied*
- *Duplicate*
- *Final*
- *Official*
- *Paid*
- *Processed*
- *Received (delivered in 2019.8)*
- *Reviewed*
- *Unofficial*
- *Verified*

F Save | Saves annotations. Unsaved annotations are discarded without warning.

8 CLEANING TOOLS | Toggles on/off the display of the document cleaning toolbar. For users without the necessary permissions, icons on this toolbar will be grayed out and unavailable. The tools available on the document cleaning toolbar are:

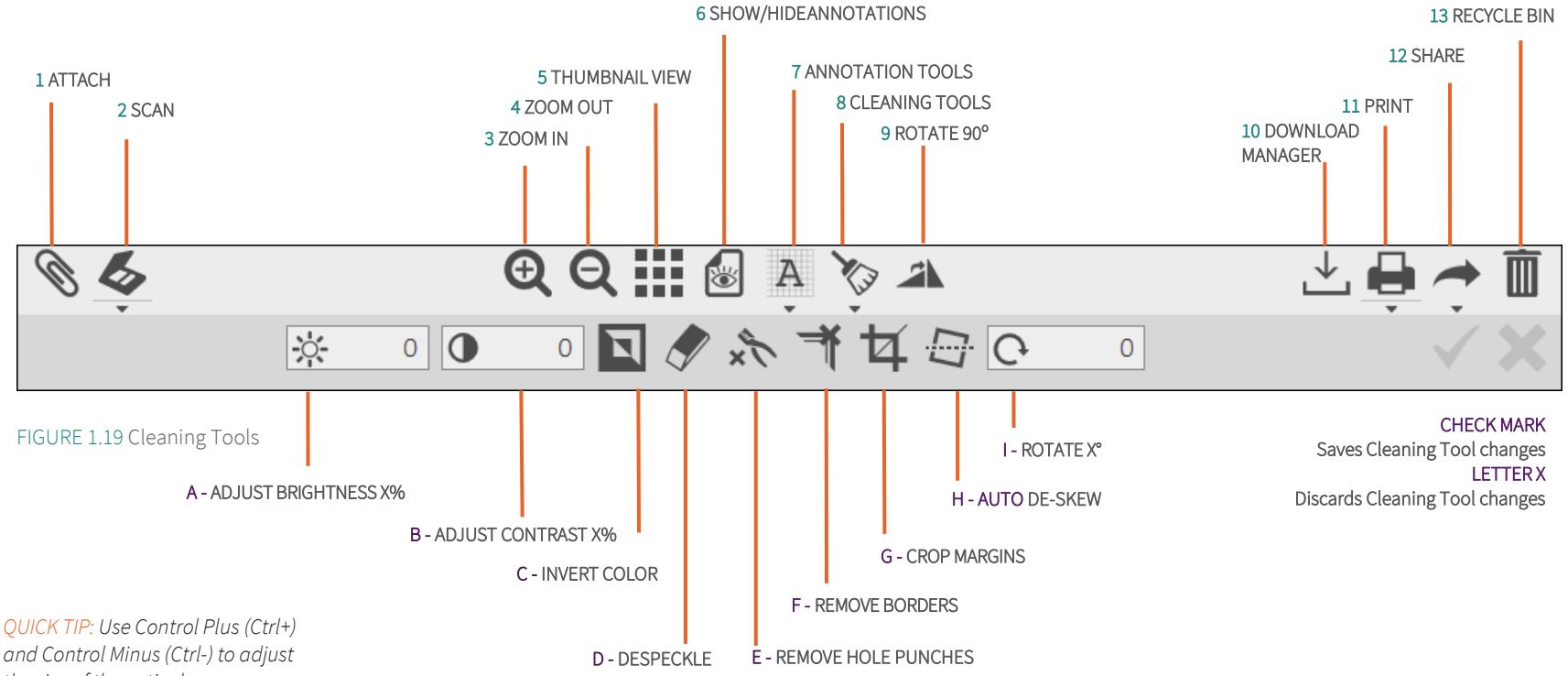


FIGURE 1.19 Cleaning Tools

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

A Adjust Brightness X% | 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. Click the circular arrow icon to apply (this change does not require a save action).

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. 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.
3. The document cleanup tools are intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.

9 ROTATE 90° CLOCKWISE | Rotates the document 90° clockwise with each click.

10 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.

11 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.

12 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 the display of 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 1.19 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.*

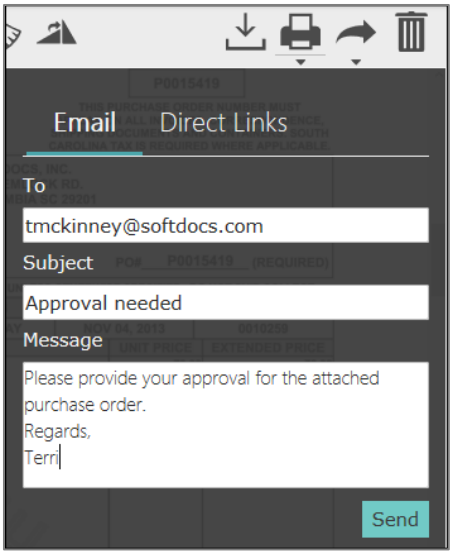


FIGURE 1.20 a Email

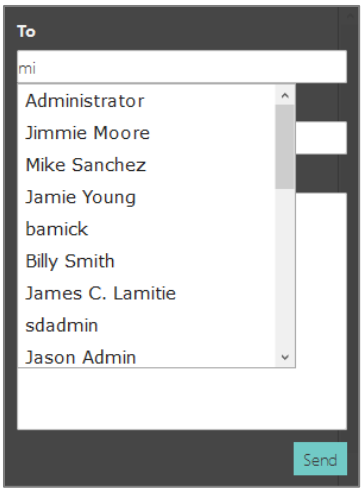


FIGURE 1.20 b Filter names with 'mi'

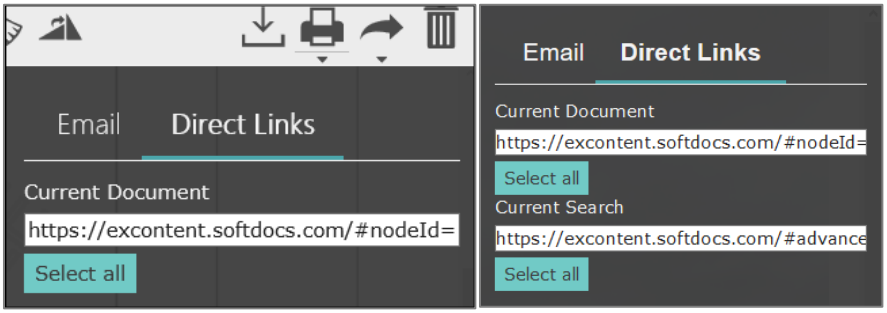


FIGURE 1.20 c Direct Links

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.

13 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 Illustration of Annotation Tools

As previously mentioned, Annotation Tools toggles on/off the display of the annotation 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 | Note - Creates an electronic sticky note on the document.

B | Highlight - Highlights a selected area with yellow.

C | Freehand - Allows users to write on the document using the cursor.

D | Rectangle - Creates a solid black rectangular box over a selected area.

E | Rubber Stamp – Provides the ability to select a rubber stamp with current date and username to place on the document.

F | Save - Saves annotations. Unsaved annotations are discarded without warning.

IMPORTANT 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.

NOTE | Adding annotations is intentionally disabled for protected PDFs. A tooltip will display whenever a user attempts any of these disabled actions.

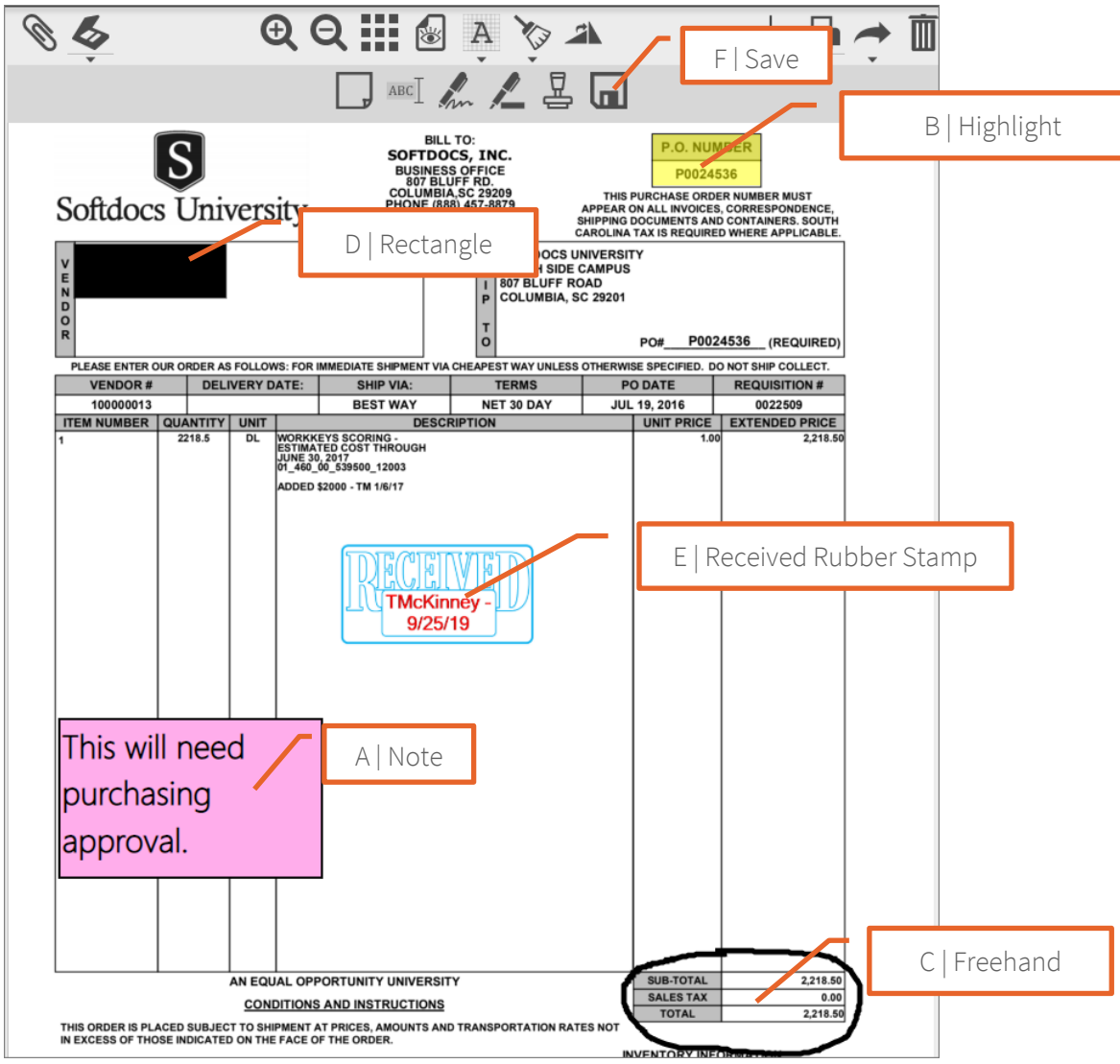


FIGURE 1.21 Illustration of Annotation Tools

1.5.3 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.

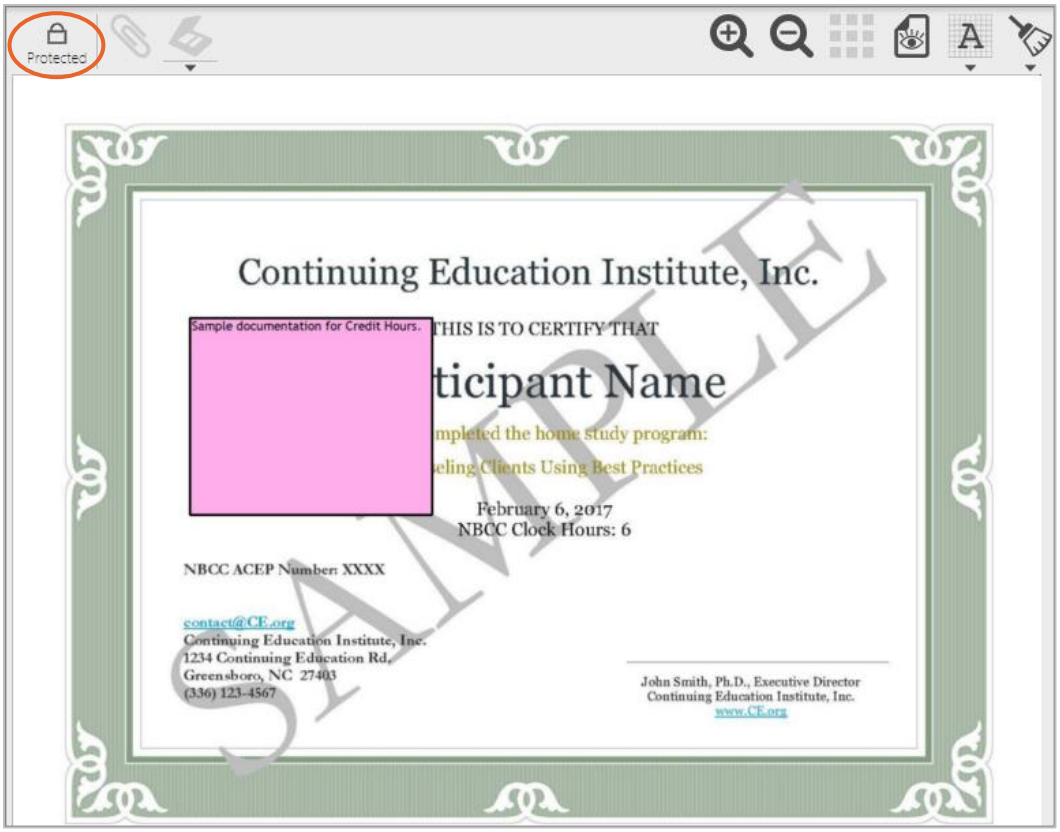


FIGURE 1.22 Protected Lock Icon on Protected PDF

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.

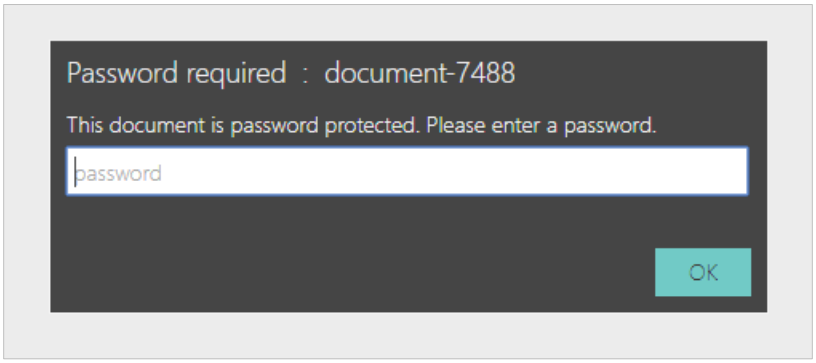


FIGURE 1.23 Password Prompt for Protected PDF

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.

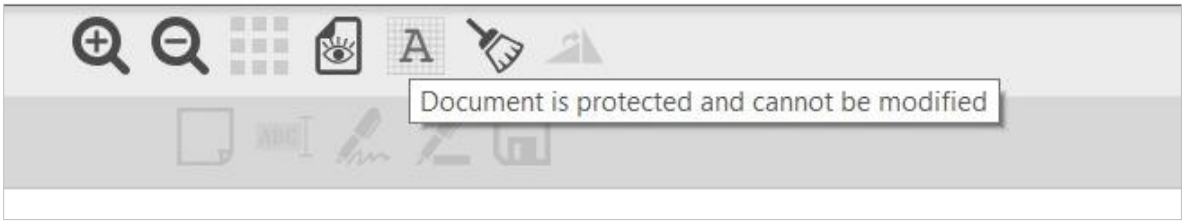


FIGURE 1.24 Tooltip for Disabled Actions on Protected PDF

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 does not support saving document passwords.

NOTE | Protected PDF support is off by default. It can be turned on in the Content Settings menu by checking the box next to 'Perform File Analysis'. See section 2.3.8 for more information.

1.5.4 Attach & Scan

As previously mentioned, users may bring new documents into Etrieve by either using Attach 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):

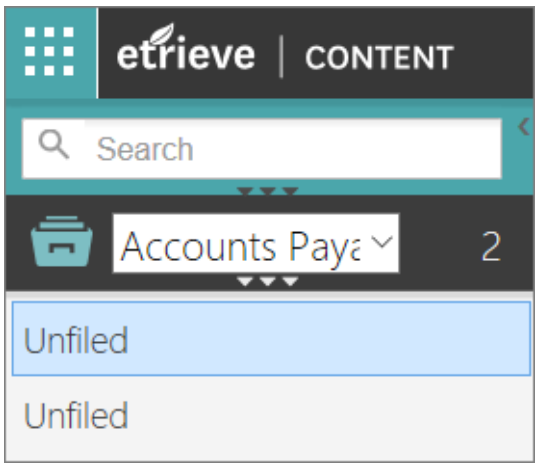


FIGURE 1.25 Unfiled Documents by Area

If a Cabinet, Drawer or a 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):

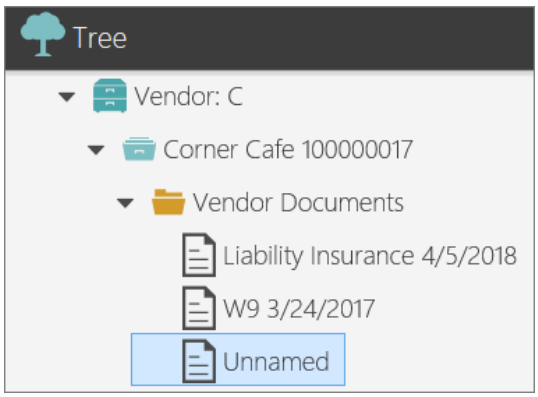
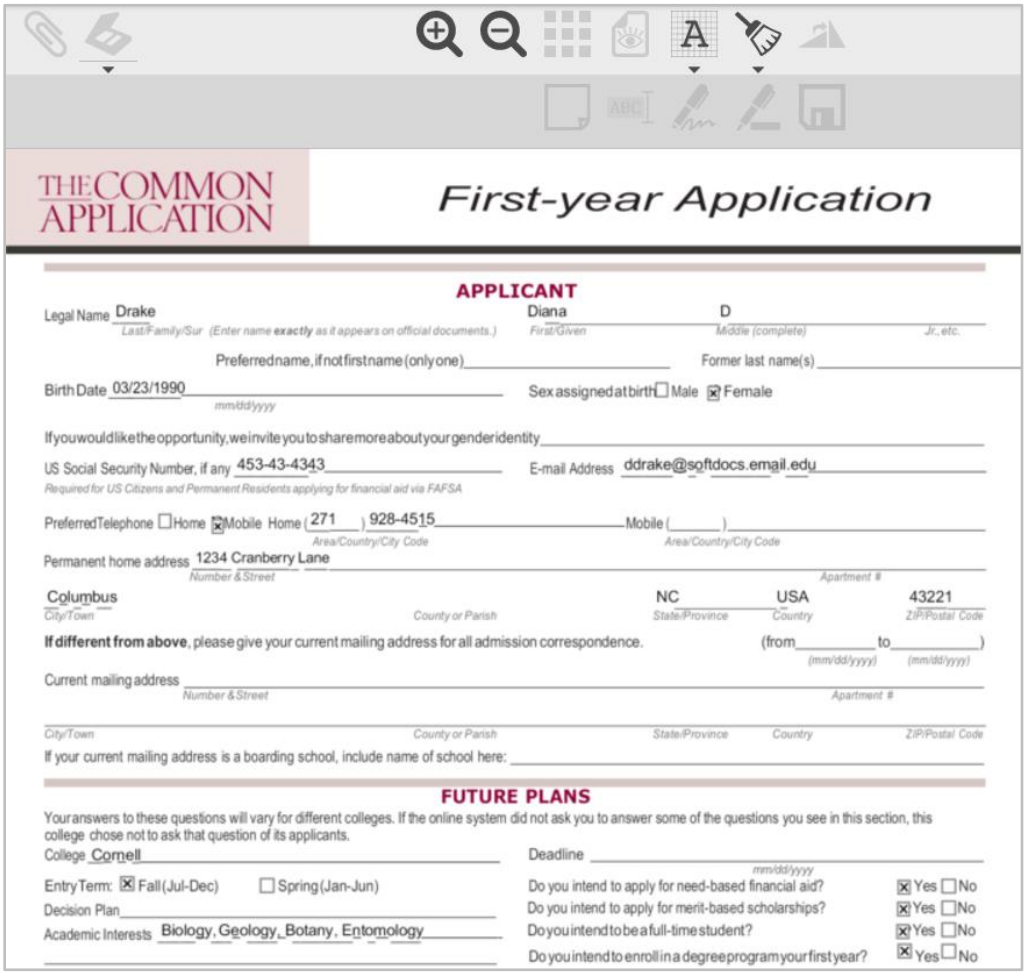


FIGURE 1.26 Unnamed Document in Folder

In addition to PDFs and graphics (PNG, TIFF), the following Document File Types are also supported by the Viewer. The Toolbar actions such as Attach, Scan, Annotations/Toggle, Cleaning Tool Toggle, and Thumbnail view 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 Drake (Last/Family/Sur) Diana (First/Given) D (Middle (complete)) (Jr., etc.)

Preferred name, if not first name (only one) Former last name(s)

Birth Date 03/23/1990 (mm/dd/yyyy) Sex assigned at birth ☐ Male ☒ Female

If you would like the opportunity, we invite you to share more about your gender identity

US Social Security Number, if any 453-43-4343 E-mail Address ddrake@softdocs.email.edu

Required for US Citizens and Permanent Residents applying for financial aid via FAFSA

Preferred Telephone ☐ Home ☒ Mobile Home (271) 928-4515 (Area/Country/City Code) Mobile (_____) (Area/Country/City Code)

Permanent home address 1234 Cranberry Lane (Number & Street) (Apartment #)

Columbus (City/Town) (County or Parish) NC (State/Province) USA (Country) 43221 (ZIP/Postal Code)

If different from above, please give your current mailing address for all admission correspondence. (from _____ to _____) (mm/dd/yyyy) (mm/dd/yyyy)

Current mailing address (Number & Street) (Apartment #)

(City/Town) (County or Parish) (State/Province) (Country) (ZIP/Postal Code)

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 Deadline (mm/dd/yyyy)

Entry Term: ☒ Fall (Jul-Dec) ☐ Spring (Jan-Jun)

Decision Plan

Academic Interests Biology, Geology, Botany, Entomology

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

FIGURE 1.27 Microsoft Word Document File Type Disables Annotations

ATTACH | When the Paperclip icon is clicked in the Viewer, Etrieve is instructed to locate a document to bring into the Viewer or to attach (append) to a document which is already in 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. 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.

1 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.

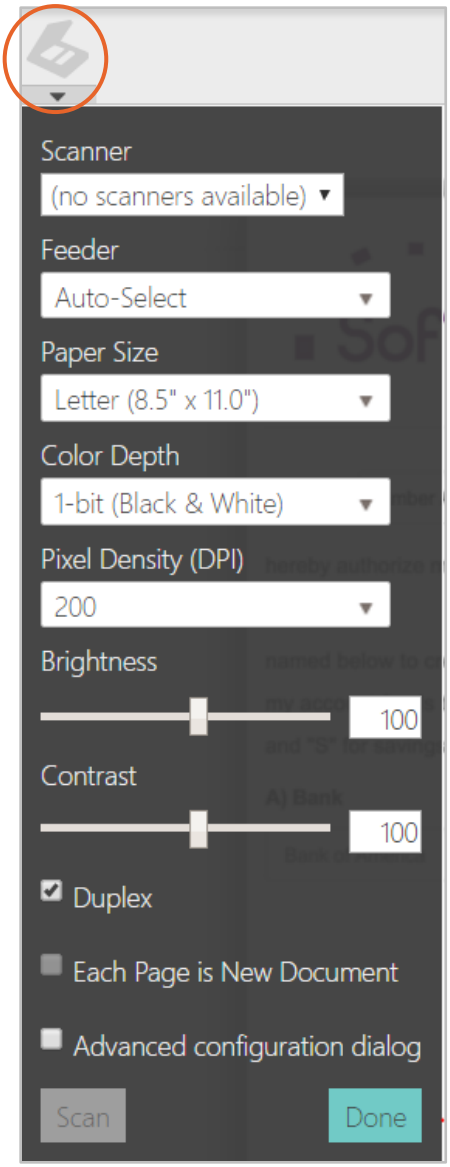


FIGURE 1.28 Scanner Settings

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

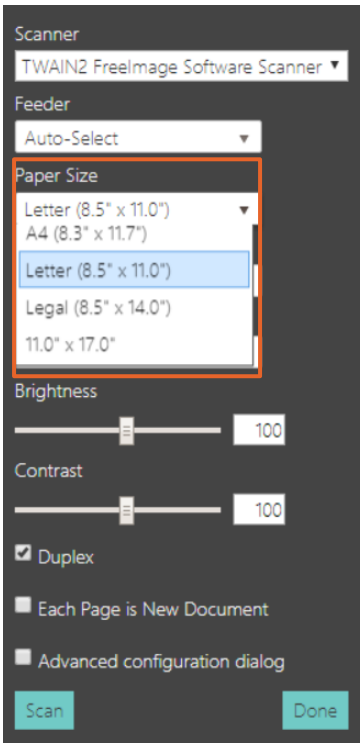


FIGURE 1.29 Scanner Paper Size Options

- 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).

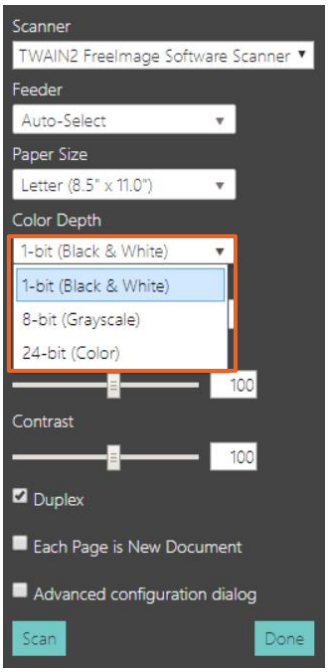


FIGURE 1.30 Scanner Color Depth

- 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.

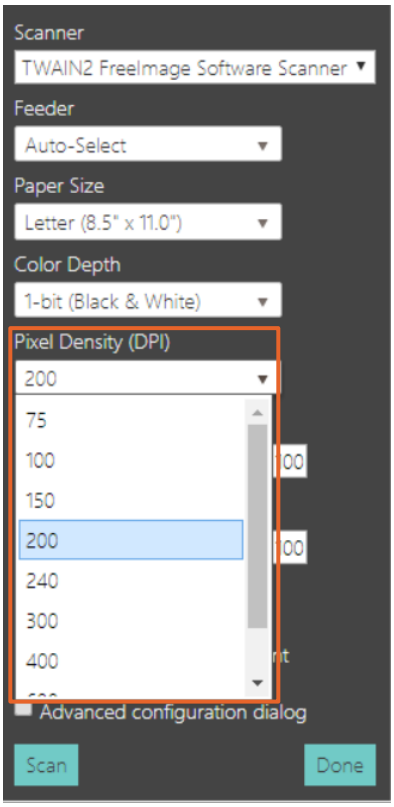


FIGURE 1.31 Scanner Pixel Density (DPI)

- 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. If the Duplex checkbox is also marked, anything (text or stains) on the back of the scanned pages will also be treated 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.

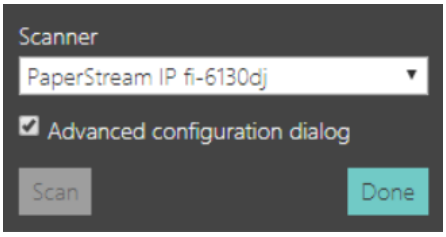


FIGURE 1.32 Advanced Configured Dialog Scanner Page

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.

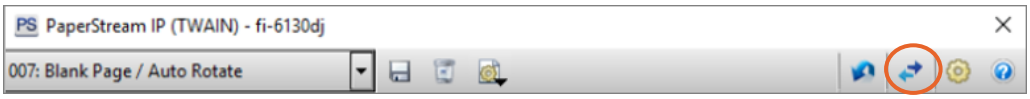


FIGURE 1.33 Scanner Advanced Options

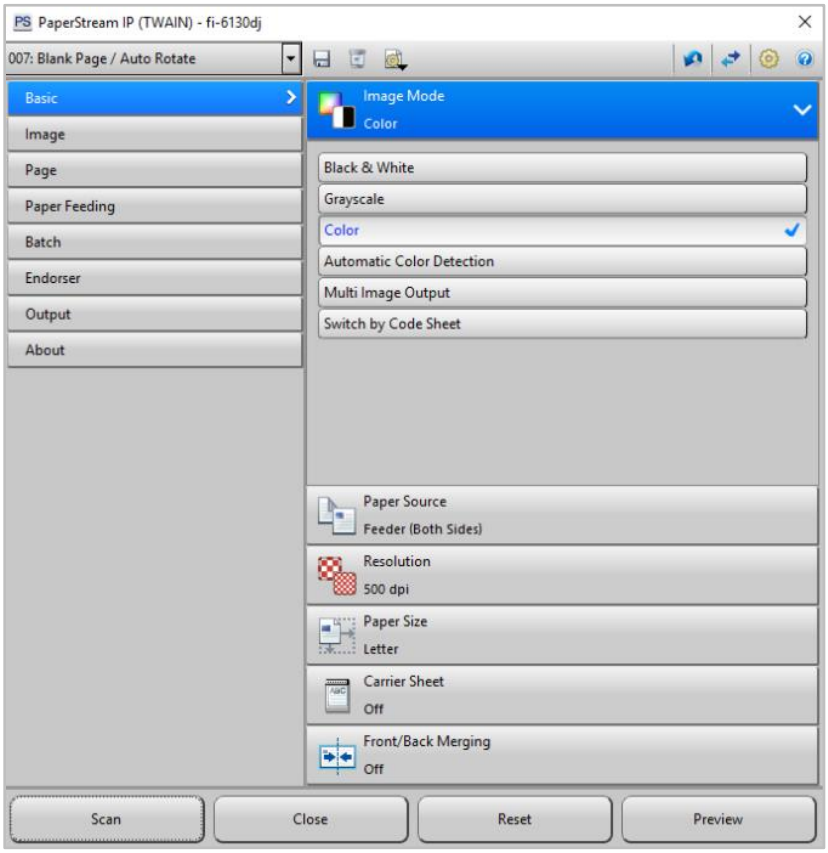


FIGURE 1.34 Scanner Advanced Options Page

- 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.

1.6 The 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 (>) just above the key graphic in the Key Fields panel.

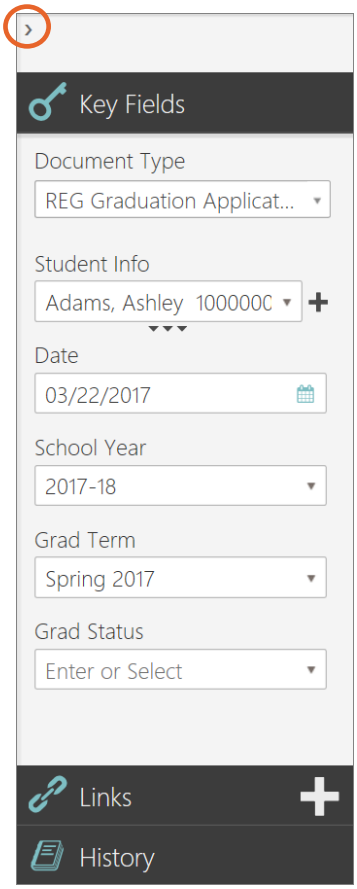


FIGURE 1.35 Index Panel

1.6.1 Key Fields

There are two types of Key Fields: Document Type (most common) and Lookup Type. 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 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. Etrieve will create the folder/drawer for the document based on this.

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.

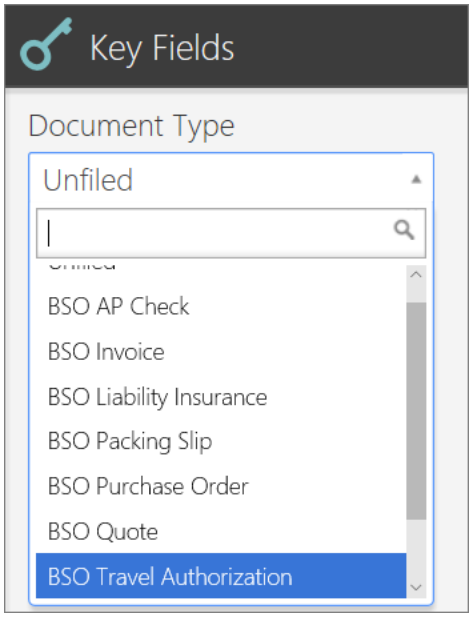
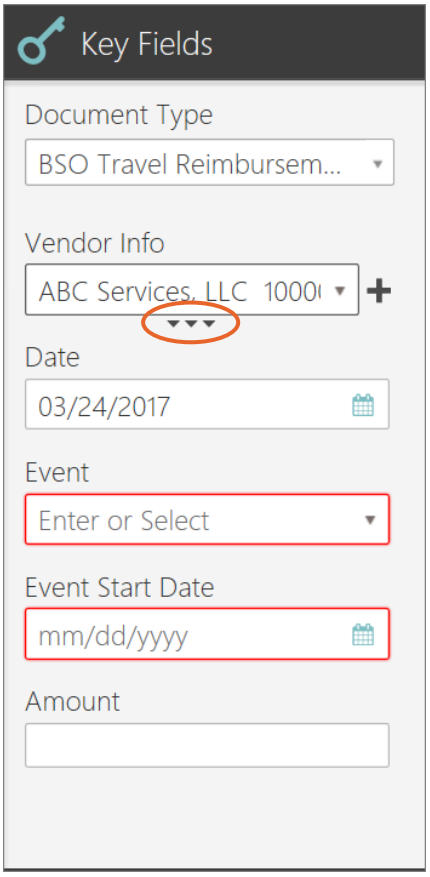


FIGURE 1.36 a Key Fields



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

FIGURE 1.36 b Key 'Required' Fields

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 Key Field:

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 in Etrieve Security, so all users may not be able to do this deletion.

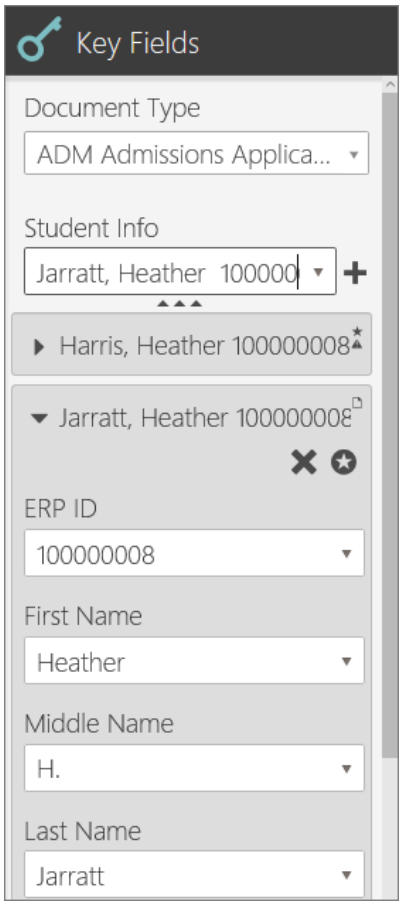


FIGURE 1.37 Lookup Key Fields

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.

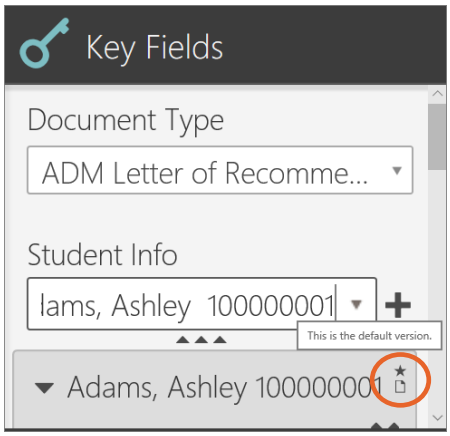


FIGURE 1.38 Lookup Key Fields

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 may be clicked to view any 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.

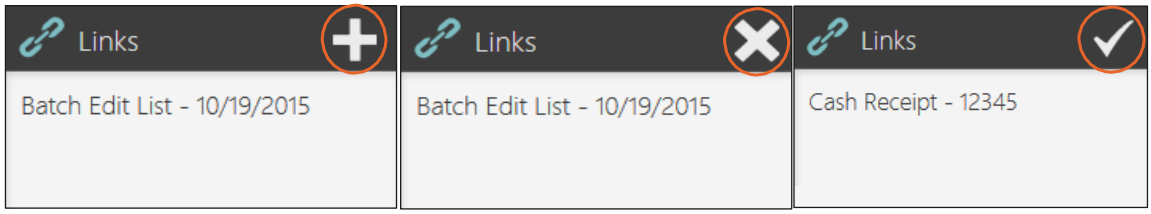


FIGURE 1.39 Links

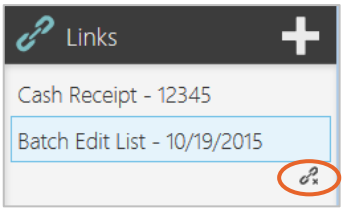


FIGURE 1.40 Remove Links

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 pop up.

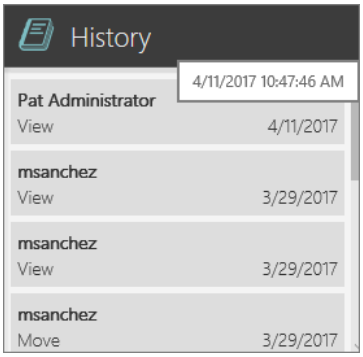


FIGURE 1.41 History