Feith WebFDD
Version 9.2
User Guide

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Introduction

Welcome to WebFDD

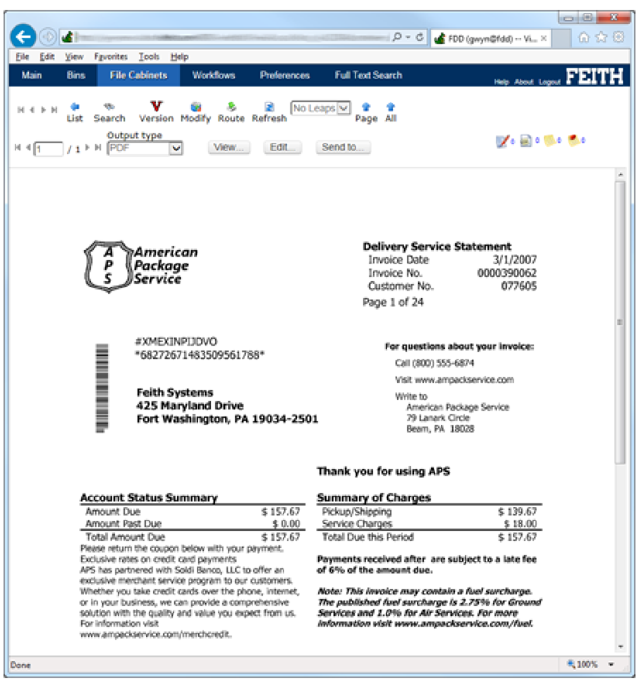
WebFDD (Web Feith Document Database) is the thin client application for viewing and managing your documents in the FDD system. Import your pages into WebFDD and then index the pages into documents in a file cabinet, entering key information that identifies each document. Find documents based on the key information or any word in the pages. Manage your documents, processing through your Workflow iQ workflows, making notes, updating your Forms iQ forms, adding pages, and more.

Get started:

- Import pages into WebFDD
- Index pages into documents in a file cabinet
- Search for documents
- View documents

Plus:

- Process documents through your Workflow iQ workflows
- Update your Forms iQ forms
- Make notes and redactions
- Manage documents
- Export and email documents



What's New?

The following are features which have been added or improved in WebFDD:

- **Filter File Cabinet Search Results:** After searching in a file cabinet, filter the results further to find the documents you need. See Filter Search Results for more information.
- **Support for Elasticsearch:** WebFDD now supports Elasticsearch, the third-party full text search engine. Autonomy IDOL is still supported. Feith TREE on Verity is no longer supported. See Full Text Search Overview for more information.
- **Full Text Search Results Layout:** The results of a full text search are laid out more simply. The results show the item's metadata and full text summary for each page that matches your search criteria. You may also view the entire full text content of the item and browse through the locations where your search terms are found. See Full Text Search Overview for more information.
- **Enable or Disable Distinct Values Search:** An administrator chooses whether Distinct Values Search is enabled or disabled on a given field. This option is set in Feith Control Panel. See Search for Documents for more information.
- **Automatic Full Text Index:** Instead of manually checking the Full Text Index checkbox, documents and batches are automatically indexed for full text searching according to the file cabinet's or bin's configuration. The FDD administrator configures file cabinets and bin to automatically add data to the full text database in Feith Control Panel (see **Feith Control Panel User Guide** for more information). See Full Text Search Overview for more information on full text searching.
- **Forms iQ Integration Links:** Forms iQ integration links (also known as WiFiQs) are supported in WebFDD. An integration link is assigned to a workflow task by the workflow designer in Workflow iQ Manager (see Workflow iQ Manager User Guide for more information) when action is required outside of WebFDD in order to process the workflow documents. If a task has a Forms iQ integration link, the link launches automatically when you retrieve a workflow document. See Integration Links for more information.
- **View Dynamic Folders:** Dynamic Folders may be used to automatically organize related documents in one location. Like documents, dynamic folders are assigned index values. One or more of these index values are used to gather the documents the dynamic folder contains. Which index values the dynamic folder matches on is determined by a file cabinet leap configured as the Dynamic Folder Leap on the file cabinet in Feith Control Panel (see **Feith Control Panel User Guide** for more information). The content of the dynamic folder changes on the fly as the results of the Dynamic Folder Leap change over time. Dynamic folders are created in FDD Client and may be viewed in WebFDD. See Dynamic Folders for more information.
- **List Fields:** List fields are supported. A list field can contain multiple values (e.g. a list of invoices or email addresses). There are three types of list fields: List of Strings, List of Numbers, and List of Dates. Enter multiple values into a list field by pressing the **ENTER** key between each value, putting each value on a separate line. See Index Batch for more information on entering values into index fields.
- **Warnings for Blank Search and Distinct Values Search:** For a file cabinet with many documents, a blank search or distinct values search could take a long time. Warnings have been added on these types of searches to make sure you want to do such a search. The warnings may be turned off if desired in Preferences or overridden by the FDD Administrator to stay on or off. See Search for Documents and Change Preferences for more information.
- **Collections:** Collect a document into a collection folder in the Collections file cabinet. A collection is a set of documents from any file cabinet brought together for your desired purpose, such as exporting them for someone. See Collect Documents for more information.

Frequently Asked Questions

Some of my preferences are disabled?

Any preference overridden by your administrator will be disabled.

As an administrator, how do I override the preferences of other users?

You must be logged in as the FDD Administrator - the "fdd" user - in order to access **Admin Preferences**. You may override user preferences if necessary. If you login as the FDD Administrator and do not see **Admin Preferences**, then the administrative features have been hidden.

How do I choose whether to do a case-sensitive or case-insensitive search on a file cabinet string field?

A search in a string field may return case-insensitive or case-sensitive results based on how your administrator configured the field in Feith Control Panel. If you want to do the opposite search from that which your administrator configured (e.g. case-insensitive instead of case-sensitive), do an advanced search. See Advanced Search for more information.

How do I clear the sort on the grid?

Your last sort is always remembered for your convenience. In order to clear the sort, you can clear the cookies from your browsing history. The next time you view the grid, no sort will be applied.

Can I view a document in a new window and still have the grid up in its own window?

Yes. Turn on the **Open Documents in New Window** option in your **Preferences**. See Change Preferences for more information.

I want to manually add a document to a workflow, but when I try to do so the workflow does not show up in the list?

Confirm that you are in the file cabinet the workflow is based on. Note that if the workflow is based on a virtual file cabinet, you must add the document from the virtual - not the virtual's base file cabinet. If you are in the correct file cabinet, confirm that you are assigned to the workflow's Start Task (whether your user is assigned or you are a member of an assigned group). This is set in Feith Workflow iQ Manager. See the Workflow iQ Manager User Guide for more information.

Tips and Tricks

- If you go to the same place all the time as soon as you login to WebFDD, use the **Go to** preference to automatically go there as soon as you log in. See Change Preferences for more information.

- To reindex a document or some of a document's pages into another file cabinet, first route the pages to a bin then index the pages as needed. See Route Document and Index Batch for more information.

- Make searching easier by using wildcards, keywords, and more. For example, search for documents filed **thismonth**. See Search on String Values, Search on Date Values, and Search on Number Values for more information.

- Use advanced search to build or write the search SQL query exactly the way you want. See Advanced Search for more information.

- After searching in a file cabinet, filter the results further to find the documents you need. See Filter Search Results for more information.

- Reorder and hide file cabinet fields the way you like. See Reorder and Hide Fields for more information.

- Export the data from the grid to an .xls file. See The Grid for more information.

Login

See the following for instructions:

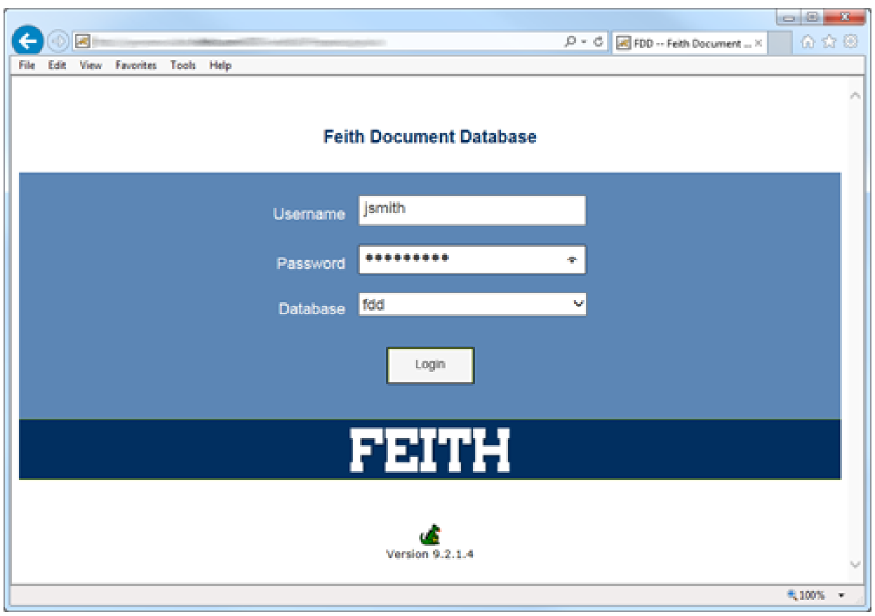
- Login to WebFDD
- Turn Off Auto Login

Login to WebFDD

To log in to WebFDD:

1. Open a browser window and enter the WebFDD address. The WebFDD login screen displays.

   If you Single Sign-On, the WebFDD login screen is not displayed and you are logged in automatically.
2. Enter your **Username**.
3. Enter your **Password**.
4. Select your **Database**.
5. Optionally check **Log me in automatically**. Turn this option on for WebFDD to remember your login information and automatically login for you, skipping the login screen.



6. Click **Login**. You are logged into WebFDD.

   Notes:

   - You may receive a **Message** before being logged into WebFDD. Your administrator can create login messages to provide you with information they want you to be aware of before using the system, such as status, use, or other information. If you receive a message, click **OK** to proceed and login to WebFDD. If you choose to **Cancel** then you will not be logged into WebFDD. Messages are configured in Feith Control Panel.
   - If you are prompted to **Change Your Password** on login, your password expired according to the rules of your administrator and you need to change it. See Change Your Password for more information. Password expiration is set in Feith Control Panel.

Turn Off Auto Login

To turn off the **Log me in automatically** option:

1. Click **About**. The **About WebFDD** window displays.
2. Click **Clear Auto Login**. The auto login option is cleared and you will now be prompted to login when you go to WebFDD.

Note: You are always logged in automatically if you Single Sign-On. This clears the **Log me in automatically** option, which is for database-authenticated users only.

The WebFDD Interface

The WebFDD Navigation Bar

The WebFDD navigation bar is located at the top of the WebFDD screen in your browser window.

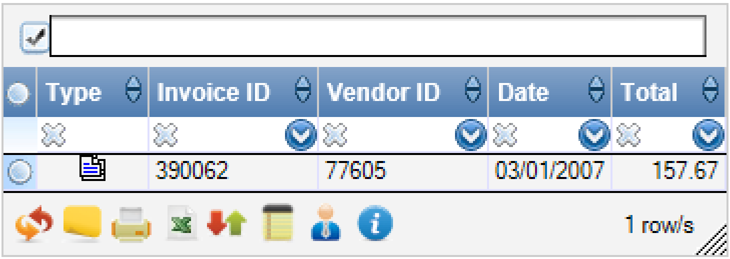
OPTION	DESCRIPTION
Main	All bins, file cabinets, and workflows (with their tasks) to which you have access. You may also perform a **Full Text Search** for batches and documents by their text content across all bins and file cabinets. This feature is available if your system is configured with a full text database. See Full Text Search Overview for more information.
Bins	The **Bins** tab list all bins to which you have access. A bin contains batches of pages that are brought into the system, to be indexed later into a file cabinet. See Import Pages to Bin and Introduction to Indexing for more information on bins and batches. Each bin has a count indicating how many batches are in the bin. Click the bin icon to view the **Bin Detail**, including the internal ID, description, storage server, etc. You may also perform a **Full Text Search** for batches by their text content across all bins. This feature is available if your system is configured with a full text database. See Full Text Search Overview for more information.
File Cabinets	The **File Cabinets** tab lists all file cabinets to which you have access. A file cabinet contains documents with pages, as well as folders, stored with "index values" that identify them. See Introduction to Indexing and Introduction to Searching for more information on indexing into file cabinets and searching file cabinets. If you are in a workflow's administration group, you also have access to the workflow's admin file cabinet and it displays in the file cabinet list as well (see The Admin File Cabinet for more information). Click the file cabinet icon to view the **File Cabinet Details**, including the internal ID, type, number of fields, etc. You may also perform a **Full Text Search** for documents by their text content across all file cabinets. This feature is available if your system is configured with a full text database. See Full Text Search Overview for more information.
Workflows	The **Workflows** tab lists all workflows and their tasks to which you have access. A workflow is a combination of tasks and routes that moves a work item (workflow document or folder) through a set of business rules until the work is completed. See Workflow iQ Overview for more information on workflows and processing work items in workflow tasks. Each workflow task has a count indicating how many work items are in the task. Click the workflow task icon to view the **Workflow Task Details**, including the internal ID, number of fields, base file cabinet, etc. You may also click **Work to Do** to see all workflows and workflow tasks to which you have access that contain work. See Work To Do Screen for more information.
Preferences	Set various user **Preferences** according to how you want to use WebFDD, such as navigation options and warning messages. See Change Preferences for more information.
Full Text Search	Perform a **Full Text Search** for documents and batches by their text content. You may search across **All** bins and file cabinets or select a specific file cabinet. This feature is available if your system is configured with a full text database. See Full Text Search Overview for more information.

Help	Open the WebFDD help file.
About	View information **About** WebFDD, your general FDD system, and your session. You may also change your password. See View Session Information and Change Your Password for more information.
Logout	Log out of the database and disconnect from WebFDD.

Note: If you are logged in as the FDD Administrator you will also see **Admin Preferences**, where user preferences can be overridden if necessary, and **Admin**, where various WebFDD administrative settings may be configured. If you are logged in as the FDD Administrator and do not see **Admin Preferences** or **Admin**, then the administrative features have been hidden.

The Grid

The grid lists batches in a bin, documents in a file cabinet, or work items in a workflow task with their information.



You may left-click an item to view it or select the item by clicking **Select Row** and perform an action using the grid right-click context menu.

The Grid Right-Click Context Menu

Select the item by clicking **Select Row** and perform an action using the grid right-click context menu. Depending on whether you are viewing a batch in a bin, a document in a file cabinet, or a work item in a workflow task, the right-click menu options will vary.

OPTION	LOCATION	DESCRIPTION
View	Bin, File Cabinet, and Workflow Task	View the item. You may select multiple items to view. See The View Window, View Documents, and View Workflow Document in Task for more information.
Modify	File Cabinet only	Modify the document's index values. See Modify Index Values for more information.
Copy	File Cabinet only	Copy the document to the clipboard so it can be pasted into a folder. You may select multiple documents to copy. See Folders for more information.
Email	Bin, File Cabinet, and Workflow Task	Email the item. You may select multiple items to email. See Email Pages and Documents for more information.
Route	Bin and File Cabinet	Route the item to a bin. You may select multiple items to route. See Route Document for more information.
Add To Workflow	File Cabinet only	Add the document to a workflow. You may select multiple documents to add to a workflow. See Add Document to a Workflow for more information.
Properties	Bin, File Cabinet, and Workflow Task	View the item's properties, including the item type, internal ID, who created it, when it was created, etc. Depending on the type of item, you may also access document notes, audit information, workflow history, locate the document, etc. See Documents Notes and View Workflow History for more information.

Add Folder	File Cabinet only	Add a folder. See Folders for more information.
Collect	File Cabinet and Workflow Task	Collect the item into a collection folder. You may select multiple items to collect. See Collect Documents for more information.
Import	Bin and File Cabinet	Import pages in to the system. See Introduction to Importing for more information.
Delete	Bin and File Cabinet	Delete the item. You may select multiple items to delete. See Delete Pages and Documents for more information.
RMA Properties	File Cabinet only	Set the document's RMA properties.
Leaps	File Cabinet only	The list of leaps available in the file cabinet is displayed. Select the desired leap in order to perform a leap on the document. See Leaps for more information.
Index	Bin only	Index the batch. See Introduction to Indexing for more information.
Unlock	Workflow Task only	Unlock a work item locked by you to make it available for other workers. You may select multiple work items to unlock. See Unlock Workflow Document for more information.

The Grid Controls

Control the grid's display and perform other actions using the grid controls.

To sort items in the grid:

- Click the column header. The sort indicator shows the direction of the sort and, if sorting on multiple columns, the order in which the columns are applied to the sort. See Sort Search Results for more information.

To resize the grid:

- Click the resize control in the bottom right corner of the grid and drag to make the grid bigger or smaller.

To resize grid columns:

1. Hold the mouse pointer over the line between two column headers. The pointer becomes a double-ended arrow.
2. Click-and-drag the column's side to make it bigger or smaller.

To reorder grid columns:

- Click on the column header and drag the column to the desired location.

To show or hide grid columns:

1. Click **Columns** . The **Select columns to display** window opens.
2. Uncheck columns to hide them. You may re-check columns to display them again.
3. Click **OK**. The grid is adjusted to only display the selected columns.

To print the grid:

1. Click **Print** . The grid is prepared for printing in a separate browser window and the browser's print interface displays.
2. Choose the desired options and print the grid. The grid is printed.

To export the grid data:

1. Click **Export** . You are prompted to download the export file.
2. Download the export file. The export file contains the grid data.

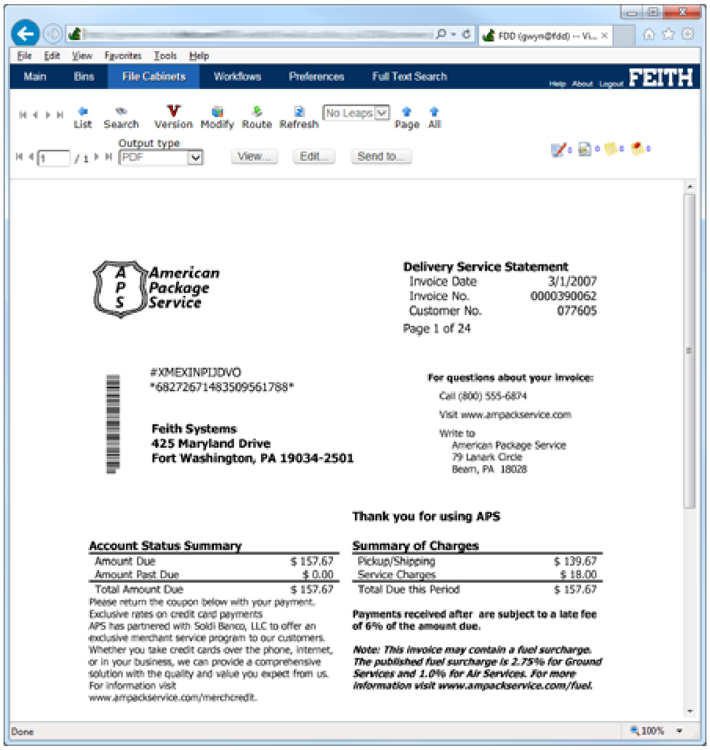
To view the grid help:

- Click **Show Help** . The **Feith Grid Help** window opens.

For instructions on how to filter file cabinet search results in the grid, see Filter Search Results.

The View Window

The view window displays a batch in a bin, a document in a file cabinet, or a work items in a workflow task and allows you to perform various actions on them.



View Window Options

Depending on whether you are viewing a batch in a bin, a document in a file cabinet, or a work item in a workflow task, the available options will vary. The below options are available in all interfaces. See View Batches, View Documents, and View Workflow Document in Task for more information on the options specific to those items.

Note: The below options vary depending on your view mode. See View Modes for more information.

OPTION	DESCRIPTION
	Navigate the pages in the item. Note that this option is only available when in **Single** page view mode.
Output type	Choose how you want the page(s) to render using **Output type** (e.g. **PDF**, **Raw**, **JPEG**, etc). Note that the list of available output types varies depending on your view mode.
View	Display the **View** options.
Single	View the document in **Single** page view mode. See View Modes for more information.
All	View the document in **All** pages view mode. See View Modes for more information.

Mini	View the document in **Mini** pages view mode. See View Modes for more information.
Pop	Open the pages in a new browser window. You may set the document to always open in a new browser window in **Preferences** (see Change Preference for more information). Note that this option is only available when in **Single** page view mode or **All** pages view mode.
Left	Rotate the page 90 degrees left. See Rotate Page for more information. Note that this option is only available when in **Single** page view mode.
Right	Rotate the page 90 degrees right. See Rotate Page for more information. Note that this option is only available when in **Single** page view mode.
Overlay	View the overlay on the page. See View Overlay for more information.
Reorder	Reorder the pages. See Reorder Pages for more information.
Reload	Reload the item display.
Info	View the page information, including who created the page, when it was created, the internal ID, etc. You may also access the page's audit information. Note that this option is only available when in **Single** page view mode.
Edit	Display the **Edit** options.
Add	Add pages. See Add Pages for more information.
Delete	Delete the current page. See Delete Pages and Documents for more information. Note that this option is only available when in **Single** page view mode.
Replace	Replace the current page. See Replace Page for more information. Note that this option is only available when in **Single** page view mode.
Send to	Display the **Send to** options.
URL	Email a WebFDD URL to the item. See Email URL to Page or Document for more information.
Email	Email the item as an attachment. See Email Pages and Documents for more information.
Export	Export the item from the FDD system to your local machine. See Export Pages and Documents for more information.
1 1 2 1	View notes on the item. See View Notes for more information.

User Administration

Change Your Password

Change your user's password.

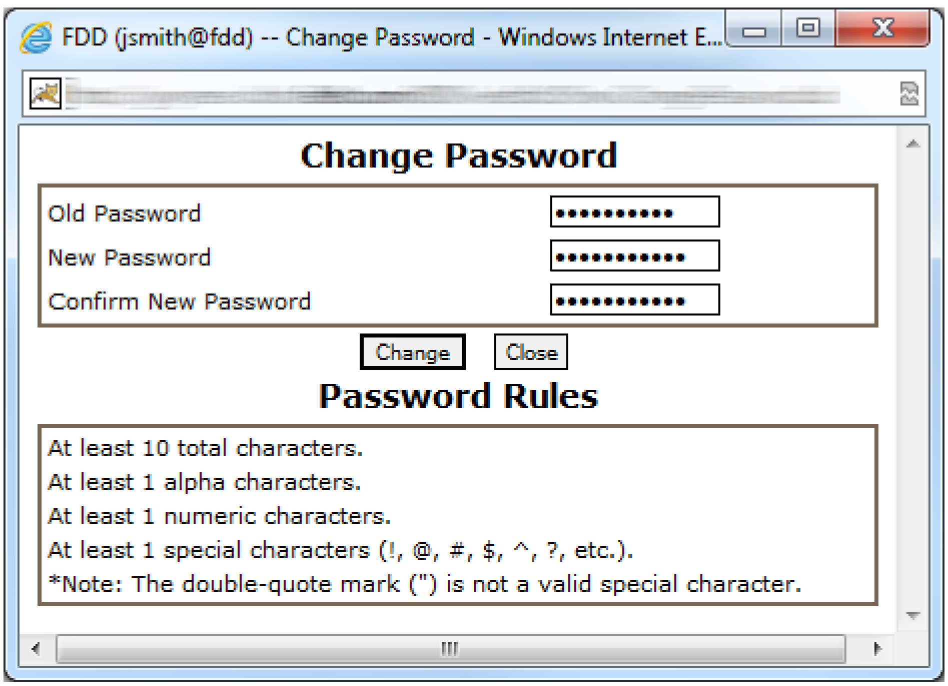
To change your password:

1. Click **About**. The **About WebFDD** window opens.
2. Click **Change Password**. The **Change Password** window opens.
3. Enter your New Password. The new password must meet the password requirements.

   The FDD administrator can set password complexity requirements in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

   These requirements are displayed on the Change Password window and include:

   - The minimum length of a password.
   - The minimum number of numeric characters (0-9).
   - The minimum number of alpha characters (a-z and A-Z).
   - The minimum number of printable non-alphanumeric characters (e.g. !, @, #, $, etc).
4. Re-enter the new password for confirmation.



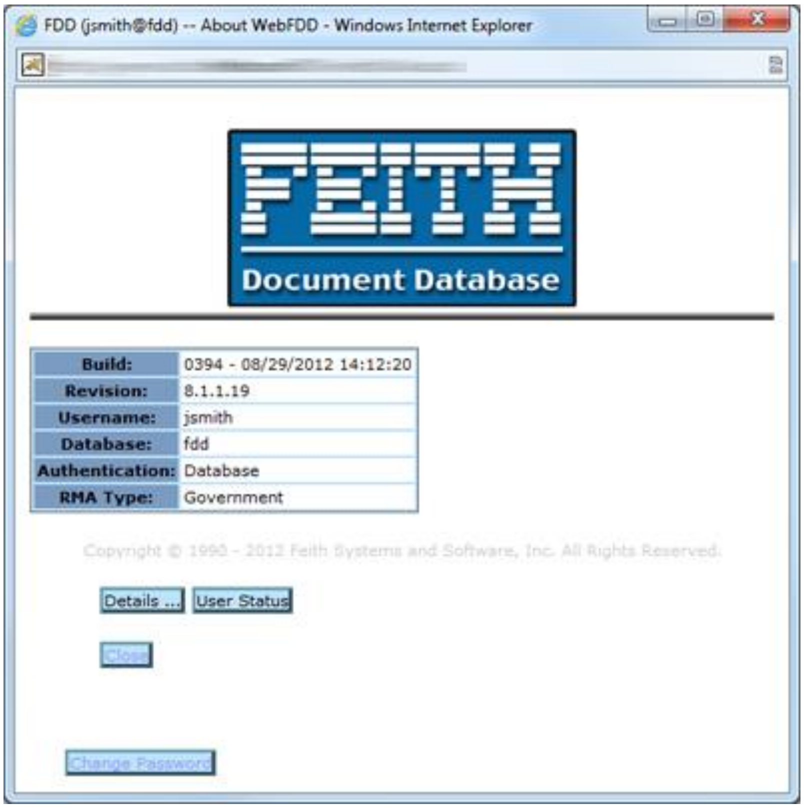
5. Click **Change** to save changes. Click **Close** to close the **Change Password** window without changing your password.

View Session Information

View information about your WebFDD session, such as the database to which you are connected and how your user is authenticated

To view information about you WebFDD session:

- Click **About**. The **About WebFDD** window opens.



The **About WebFDD** window displays the following session information:

  - **Username:** The user you are logged in as.
  - **Database:** The database to which you are connected.
  - **Authentication:** How your user is authenticated. A database-authenticated user is shown as **Database** and an externally-authenticated user (e.g. Single Sign-On user) is shown as **Externally Authenticated**.

The **About WebFDD** window also displays WebFDD **Revision** and **Build** information, as well as your **RMA Type**.

Change Preferences

Set various user preferences according to how you want to use WebFDD, such as navigation options and warning messages.

Note: Your preferences may be overridden by the FDD administrator.

To set your WebFDD preferences:

1. Click the **Preferences** tab.

   Note: The **Preferences** tab does not display if you do not have permission to change your preferences.

2. Change preferences as desired in the following tabs:
   - **Login:** Preference that controls the screen you go to when you login to WebFDD.
   - **Minipage:** Preferences that control how minipages are displayed.
   - **Button:** Preferences that control how buttons display.
   - **GOS:** Preference that controls how GOS (General Object Storage) pages display.
   - **Document:** Preferences that control how documents display.
   - **Search:** Preferences that control how searching looks and works.
   - **Indexing:** Preferences that control how indexing works.
   - **Email:** Preferences that control how and when you receive emails sent from the FDD system through Feith Harrier, such as email notifications from Workflow iQ.
3. Click **Update** to apply your preference changes.

Login Tab

Preference that controls the screen you go to when you login to WebFDD.

PREFERENCE	DESCRIPTION
Go to...	Choose the screen you go to when you login to WebFDD. The available screens are **Main**, **Bins**, **File Cabinets**, **Workflows**, and **Full Text Search**. See The WebFDD Navigation Bar for more information on these screens. If you select **Bins**, **File Cabinets**, or **Workflows**, you may optionally specify a certain bin, file cabinet, or workflow task where you want to go. Selecting a certain bin will take you to the list of batches in that bin. Selecting a certain file cabinet or workflow task will take you to the search form for that file cabinet or workflow task. If you do not specify a certain bin, file cabinet, or workflow task you will be taken to the general list of bins, file cabinets, or workflows, as applicable, depending on which option you select.

Minipage Tab

Preferences that control how minipages are displayed. Click **Default** to restore the preferences to their default values.

PREFERENCE	DESCRIPTION
Number of columns	Enter the number of minipages to display in one column.
Number of rows	Enter the number of minipages to display in one row.
Thumbnail width	Enter the width, in pixels, of each minipage.
Thumbnail height	Enter the height, in pixels, of each minipage.
Minipages DPI	Enter the resolution at which to display minipages.

Button Tab

Preferences that control how buttons display. Click **Default** to restore the preferences to their default values.

PREFERENCE	DESCRIPTION
Button Font Size	Choose **Small**, **Normal**, or **Large** font size for the button text.
Button Viewing Mode	Choose whether the button text or icon, or both, display. Options are as follows: • **Text and Icon:** Both the button icon and text are shown. • **Text Only:** Only the button text is shown. • **Icon Only:** Only the button icon is shown.

GOS Tab

Preference that controls how GOS (Generalized Object Storage) pages display. See View General Objects for more information on GOS pages.

PREFERENCE	DESCRIPTION
Display GOS Objects	Turn this option on to have WebFDD attempt to display the GOS page in the browser. If this option is off, information on the GOS information page is displayed instead with options to save the page or view it in another application. Note that this option is only applies for **Single** page view mode. See View Modes for more information.

Document Tab

Preferences that control how documents display. Click **Default** to restore the preferences to their default values.

PREFERENCE	DESCRIPTION
Item Copy/Cut	Choose how content is handled on the WebFDD clipboard when copying or cutting. Available options are: • **Overwrite current clipboard content:** Copying or cutting an item to the WebFDD clipboard overwrites the current WebFDD clipboard contents. • **Append to the current clipboard content:** Copying or cutting an item appends the item to the current WebFDD clipboard contents.
Open Documents in New Window	Turn this option on to open documents in a new browser window. If this option is off, documents open in the same browser window.
Show Overlay by Default	Turn this option on to display overlays by default. If this option is off, overlays do not display by default. See View Overlay for more information.
Default Viewing Mode	Choose what viewing mode documents display in by default. Available options are: • **Single Page:** Displays each page of the document separately. • **All Pages:** Displays all pages of the document in a single output. • **Minipages:** Displays all pages of the document in miniature. See View Modes for more information.
Default Single Page Output	Choose the default output for the **Single** page viewing mode. See View Modes for more information.
Default All Page Output	Choose the default output for the **All** pages viewing mode. See View Modes for more information.
Default Mini Page Output	Choose the default output for the **Mini** pages viewing mode. See View Modes for more information.

Search Tab

Preferences that control how searching looks and works. Click **Default** to restore the preferences to their default values.

PREFERENCE	DESCRIPTION
Search Layout	Choose your preferred search layout to go to by default. Available options are **Grid**, **Form**, and **Advanced**. See Search Layouts for more information on the search layouts.

Warn on Blank File Cabinet Search	Turn this option on to receive a warning when you do a blank search in a file cabinet with no search criteria. If this option is off, you will not receive the warning. Note that a file cabinet with many documents may take a long time to return the results of a blank search.
Warn on Distinct Field Search	Turn this option on to receive a warning when you do a distinct search on a file cabinet field. If this option is off, you will not receive the warning. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.
Max Results	Choose the default maximum number of results to bring back in **Bins**, **File Cabinets**, **Folders**, and **Workflow Tasks**.

Indexing Tab

Preferences that control how indexing works.

PREFERENCE	DESCRIPTION
Alert user when modifying document index?	Turn this option on to receive a warning in order to confirm modification of index values in workflow. If this option is off, you will not receive the warning.
Retain Indexing Values	Turn this option on to retain the last-used index values during an indexing session. Values may be cleared manually by clicking **Clear** in the index form. If this option is off, the index values will not be retained from one index action to another.
Indexing Mode	Choose the default indexing mode. Available options are: • **Index Whole Batch:** Index all pages in the batch with the same index values, making all pages in the batch one document in the file cabinet. • **Index Current Page:** Index the batch page by page, allowing different pages to have different index values which results in different documents in the file cabinet. See Index Batch for more information on indexing.

Email Tab

Preferences that control how and when you receive emails sent from the FDD system through Feith Harrier, such as email notifications from Workflow iQ. You set email rules that Harrier follows when processing FDD system email. A rule takes effect on an email based on the email's subject.

Any FDD user may set their own rules and the FDD Administrator may view and modify all FDD users' rules as well as set rules for *any* email address. For example, it may be desirable for the FDD Administrator to set rules for an email group (e.g. sales@abcinc.com).

Note: Email preferences are not available by default but may be enabled if desired. Contact your Feith representative for more information.

To add an email rule:

1. Next to the **Rules** list click **Add**. Your FDD **Email** address is displayed and is the email address to which the rule will apply.

   Note: If you are logged in as the FDD Administrator, you can go to **Admin Preferences** to view and modify all FDD users' rules. You may also set a rule for *any* email address by entering the desired email address in the **Email** field. For example, it may be desirable for the FDD Administrator to set rules for an email group (e.g. sales@abcinc.com).

2. Enter a **Description** for the rule.
3. Enter the **Subject** of the email to which the rule will apply. For example, "Expense Report Approval".

   You can use an asterisk (*) as a wildcard in the **Subject** to apply the rule to multiple emails or to emails with unique information in the subject. For example, "*Approval*" would apply to any email with the word "Approval" anywhere in the subject.

   Note: The subject is treated in a case-insensitive manner.
4. Select the rule **Action**:
   - **Block emails:** Emails are blocked and not received.
   - **Delay emails (according to schedule):** Emails are not sent immediately but delayed and sent according to the preferred schedule.
   - **Delay and consolidate emails (according to schedule):** Emails are not sent immediately but delayed according to the preferred schedule as well as grouped into fewer emails.
5. If you chose **Delay emails** or **Delay and consolidate emails**, set the **Schedule** for when you want emails to arrive, choosing the days of the week and times of day that you prefer.
6. If you chose **Delay and consolidate emails**, optionally set the following:
   - **Max Count:** The maximum number of emails to consolidate into a single email.
   - **Consolidated Email Subject:** The subject of the consolidated email.
7. Click **Add**. The rule is added and displays in the **Rules** list.

To modify an email rule:

1. Select the rule in the **Rules** list.
2. Modify the settings as desired.
3. Click **Update**. The rule is updated.

To delete an email rule:

1. Select the rule in the **Rules** list.
2. Click **Delete**. The rule is deleted.

Note: If you are logged in as the FDD Administrator you will also see **Admin Preferences**, where user preferences can be overridden if necessary. If you are logged in as the FDD Administrator and do not see **Admin Preferences**, then the administrative features have been hidden.

Import Pages

Introduction to Importing

Import your pages into a temporary container called a "bin" where they are stored in "batches." A "batch" in a "bin" is like a pile of mixed papers waiting to be organized; they may be related or not. The pages will wait in batches in the bin until they are permanently indexed into a file cabinet.

You can import any type of file into FDD, including images, text, MS Office documents, PDFs, and more. Images and text are stored natively but other file types are stored as GOS (Generalized Object Storage). See View General Objects for more information on GOS pages.

Get started:

- Import files as pages into a bin.
- Mange your batches as needed to prepare the way for quick, easy indexing. Import some more pages into an existing batch, change the batch's priority, rename a batch, and more.

Alternatively, you can skip the batches and bins and:

- Import pages directly into a file cabinet.
- Added a new page to an existing document.

Import Pages to Bin

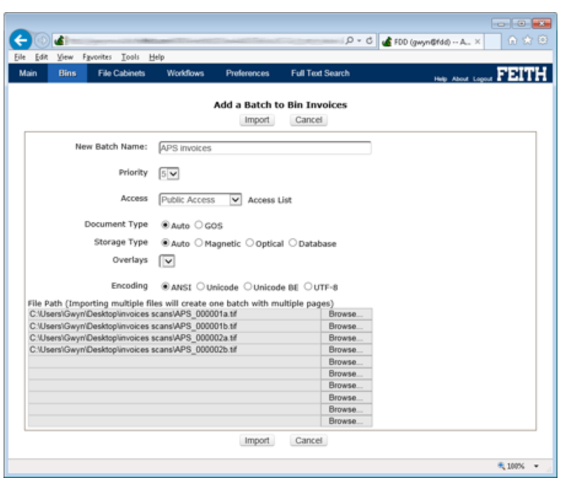
Import pages into a bin, creating a batch of pages to be indexed later into a file cabinet.

To import pages into a bin:

1. Select the bin to which you want to import the pages. Any batches already in the bin display.
2. Click **Import** . The **Add a Batch to Bin** screen displays.
3. Optionally enter a **New Batch Name** or leave it blank to allow WebFDD to assign a name for you.

   Every set of imported pages (called a batch) must have a unique name. You may name the batch yourself by entering a **New Batch Name** (up to 64 characters). Alternatively, you may leave the name blank and allow WebFDD to automatically assign a name for you, specifically the date and time the batch was imported (with a sequential number to force uniqueness, if necessary). These names are very useful since they indicate when the batch was imported.
4. Select the desired import options:
   - **Priority:** Optionally specify a **Priority**. Batch priority is on a scale of **1** to **9**, with **1** being the highest priority.
   - **Access:** Optionally specify document-level permissions by choosing a permission template from the **Access** list.

     It is recommended to use the default **Public Access**. Restricting access to documents using document-level permissions is not normally needed. Document permission templates are created in Feith Control Panel (see **Feith Control Panel User Guide** for more information).
   - **Document Type**: Choose the **Document Type**. Leave the **Auto** option set to have the type detected automatically, or specify the type as **GOS** (Generalized Object Storage). See View General Objects for more information on GOS pages.
   - **Storage Type:** Choose the **Storage Type**, specifying what type of storage to use depending on the setup of your system. It is recommended to use the default **Auto**.
   - **Overlays:** Optionally choose one of the **Overlays** to apply to the pages. See View Overlay for more information on overlays.
   - **Encoding:** Optionally specify the **Encoding** for text pages you are importing. Available options are **ANSI**, **Unicode**, **Unicode BE**, and **UTF-8**.
5. Click **Browse** to browse to a file you want to import as a page. Repeat this process to import multiple files as one batch with multiple pages.

6. Click **Import**. The batch is created with the selected files as pages.

Manage Batches

Import your pages into a temporary container called a "bin" where they are stored in "batches." A "batch" in a "bin" is like a pile of mixed papers waiting to be organized; they may be related or not. The pages will wait in batches in the bin until they are permanently indexed into a file cabinet. Mange your batches as needed to prepare the way for quick, easy indexing.

To add a page to a batch, see Add Pages for instructions.

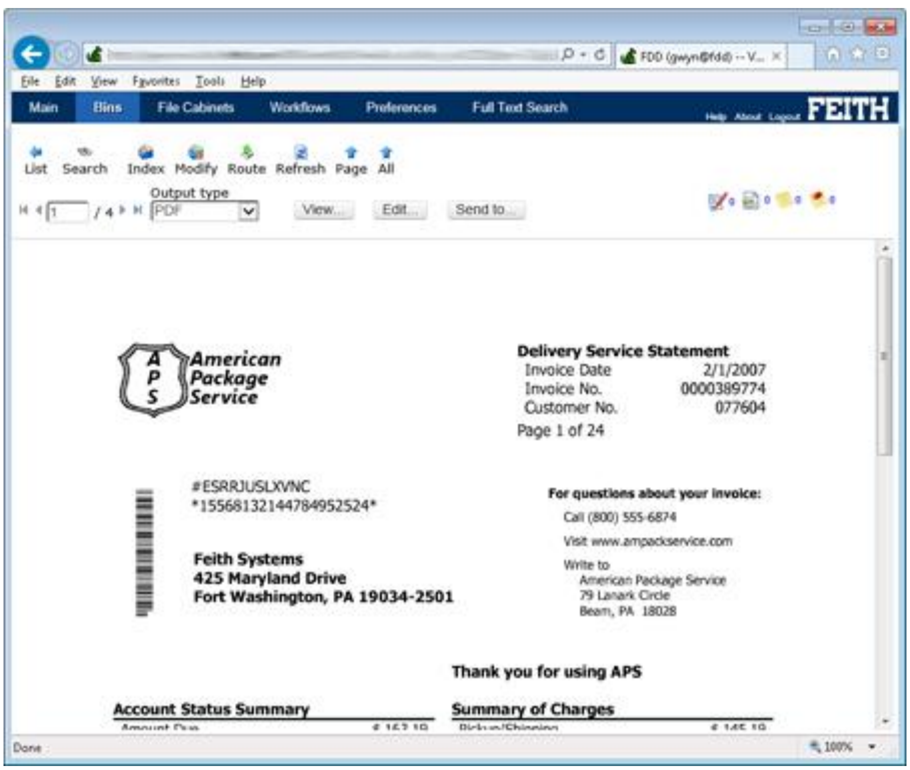
To view a single batch:

1. Select the desired bin. The **Batch list** screen displays and lists all the batches in the bin.

   You may adjust the grid so that the bin list displays as desired. See The Grid for more information.

2. Left-click a batch in the bin list grid to view it. The batch displays in the **View Document** screen.

   Note: If you would prefer the batch to open in a new window, you may turn on the **Open Documents in New Window** option in your **Preferences**. See Change Preferences for more information.



3. You may choose from various view options and perform other functions:

   - **Index** the batch pages as documents in a file cabinet. See Index Batch for more information.
   - Under **View**, choose to display the batch in **Single** page, **All** pages, or **Mini** pages view mode. See View Modes for more information.
   - Under **View**, you may click **Pop** to open the page in a new browser window. You may set the batch to always open in a new browser window in **Preferences** (see Change Preferences for more information).

     Note: This option is only available when in **Single** page view mode or **All** page view mode.
   - Click **Page** to hide the page controls or **All** to hide all controls.
   - Click **List** to return to the bin list.
   - **Modify** the batch's title or priority.
   - **Route** the batch to another bin. See Route Document for more information.
   - See The View Window for more information on other controls and functions, such as rotating pages, reordering pages, adding pages, emailing, exporting, notes, etc.
   - **Note:** If you see the **General Object** page instead of the page itself, the page is GOS (a General Object). See View General Objects for more information.

To view multiple batches:

1. Select the desired bin. The **Batch list** screen displays and lists all the batches in the bin.
2. Select the multiple batches using **Select Row** .
3. Right-click one of the batches and select **View**. The **View Multiple Documents** window opens and the batches display.

   Navigate through the pages in the documents using the controls provided by Adobe Reader in the browser.

To rename a batch:

1. View a batch.
2. Click **Modify** . The batch information window opens.
3. Enter a new **Title** for the batch.
4. Click **Save** . The batch is renamed.

To change a batch's priority:

1. View a batch.
2. Click **Modify** . The batch information window opens.
3. Select a new **Priority** for the batch.

   Batch priority is assigned on a scale of **1** to **9**, with 1 being the highest priority.
4. Click **Save** . The batch priority is changed.

To delete a page from a batch:

1. View the batch containing the page you want to delete.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page that you want to delete.
4. Under **Edit** click **Delete** . You are prompted to confirm the delete.
5. Click **OK** to proceed with the delete. The page is deleted.

To delete a batch:

1. elect the bin containing the batch you want to delete. The bin's batch list displays.
2. Select the desired batch(es) by clicking **Select Row** . You may select multiple batches to delete if desired.
3. Right-click and select **Delete**. You are prompted to confirm the delete.
4. Click **OK** to proceed with the delete. The selected batch(es) is deleted.

Import Pages to File Cabinet

To import pages directly into a file cabinet:

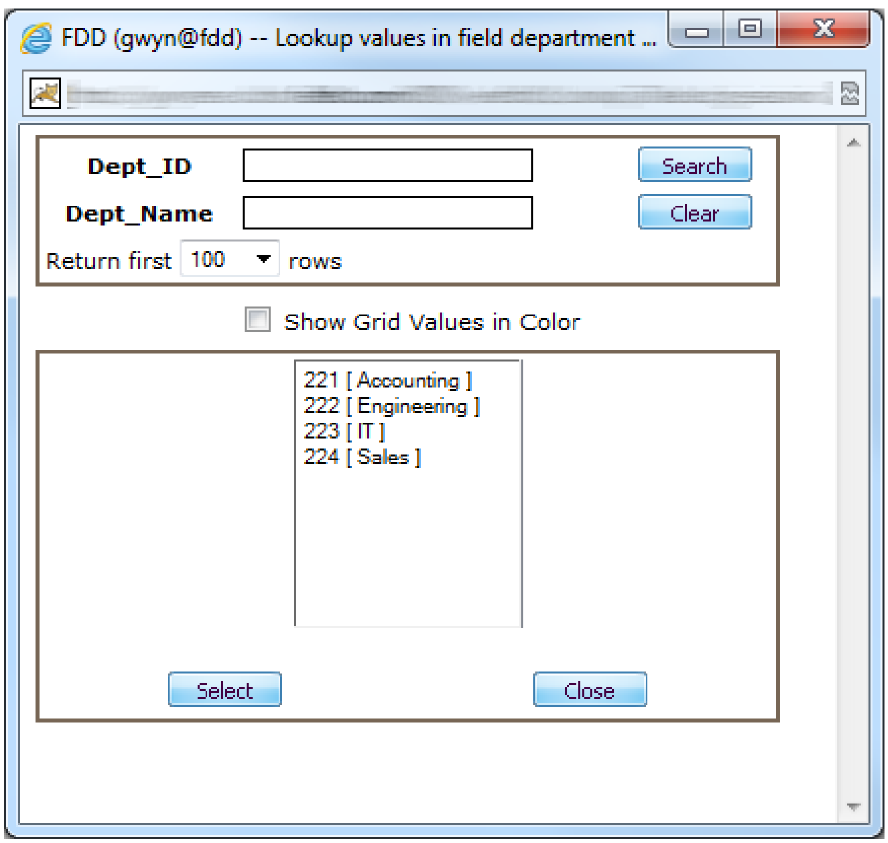
1. Select the file cabinet to which you want to import pages. The **Search in File Cabinet** screen displays.
2. Click **Index New**. The **Import a Document into File Cabinet** screen displays.
3. Enter the index values for the document. Index values are key pieces of information for identifying and finding the document. There are various options for entering index values:
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - If a field has a binoculars icon, click it to choose from a list of suggested values in the **Lookup values** dialog. Note that if the binoculars are red, the value *must* be chosen from the list of suggested values.

     To choose a value from a lookup table:

     In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

     By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

     Select the desired value in the list and click **Select** to insert the value into the field.

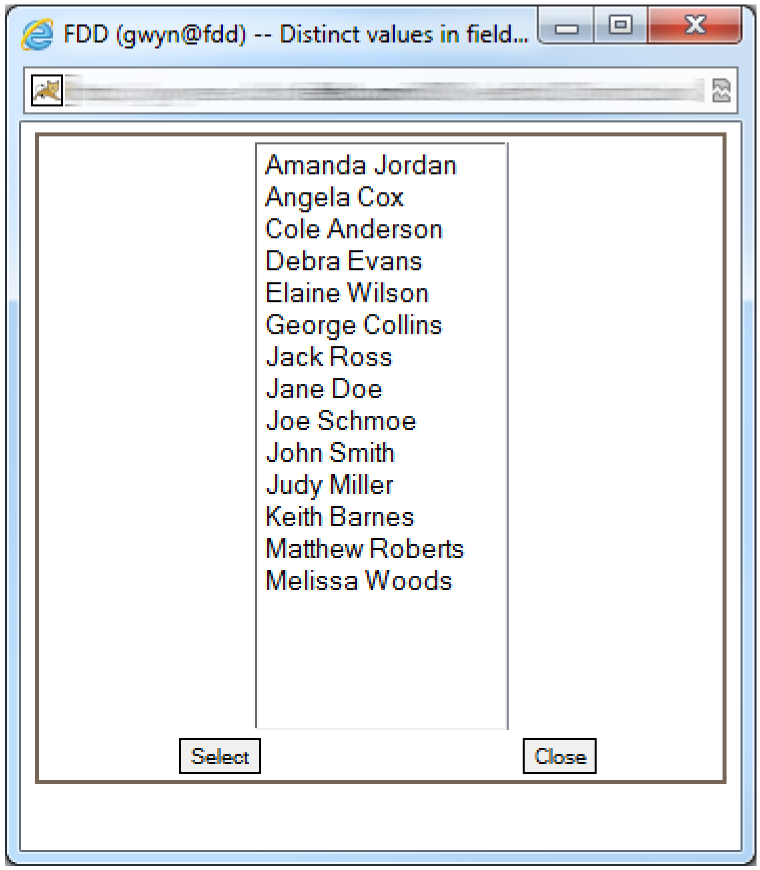


- Select from a list of distinct values that already exist for that file cabinet field by clicking the field name. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



- Note that some index fields may be read-only. You are prevented from entering data into read-only fields.
- Click **Clear** to clear index fields or click **Default** to reset the index fields back to their default values.
- **Note:** If you enter index values identical to an existing document the page(s) will be appended to that document automatically.

4. Select the desired import options:

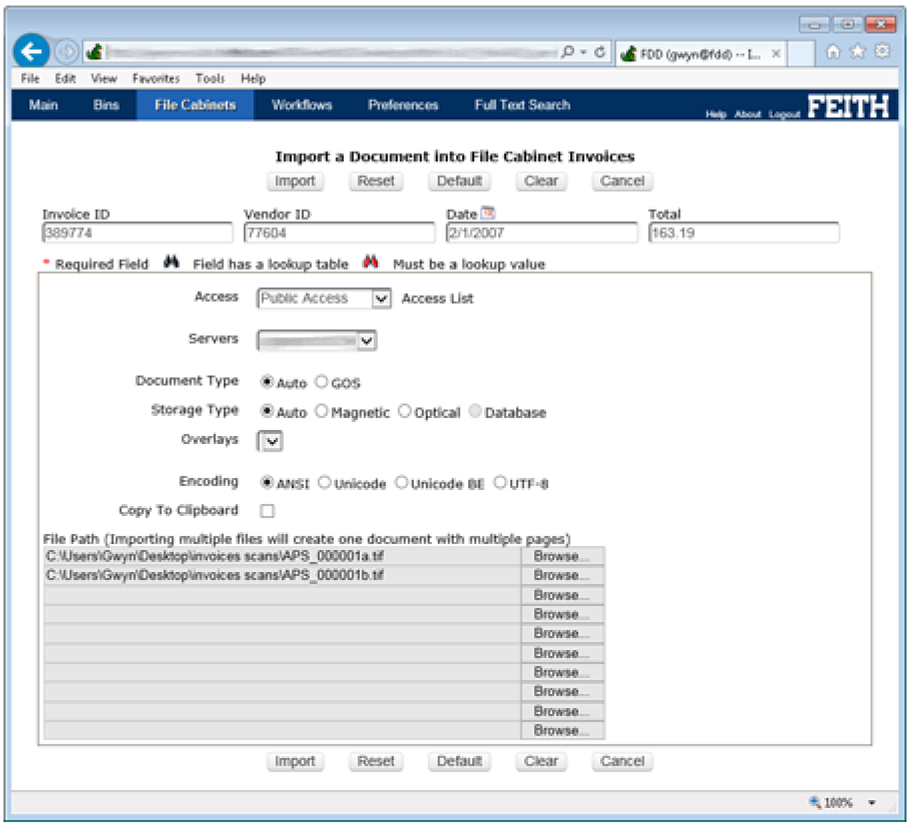
- **Access:** Optionally specify document-level permissions by choosing a permission template from the **Access** list.

  It is recommended to use the default **Public Access**. Restricting access to documents using document-level permissions is not normally needed. Document permission templates are created in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

- **Servers:** Optionally specify the server on which to store the image, if you have more than one image server.

- **Document Type:** Choose the **Document Type**. Leave the **Auto** option set to have the type detected automatically, or specify the type as **GOS** (Generalized Object Storage). See View General Objects for more information on GOS pages.
- **Storage Type:** Choose the **Storage Type**, specifying what type of storage to use depending on the setup of your system. It is recommended to use the default **Auto**.
- **Overlays:** Optionally choose one of the **Overlays** to apply to the pages. See View Overlay for more information on overlays.
- **Encoding:** Optionally specify the **Encoding** for text pages you are importing. Available options are **ANSI**, **Unicode**, **Unicode BE**, and **UTF-8**.
- **Copy to Clipboard:** Optionally copy the new document to the WebFDD clipboard, so that it can be pasted into a folder. See Folders for more information.

5. Click **Browse** to browse to a file you want to import as a page. Repeat this process to import multiple files as one document with multiple pages.



6. Click **Import**. The document is created with the selected files as pages.

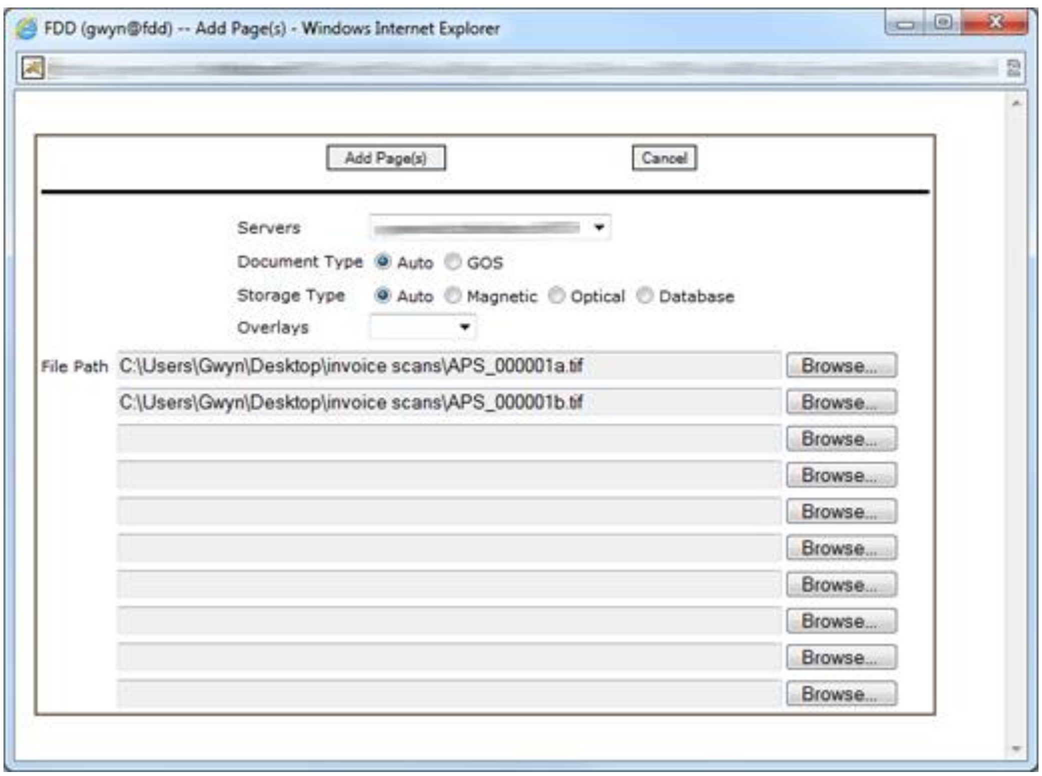
Note: You may also import when viewing the in document list resulting from a file cabinet search by clicking **Import**.

Add Pages

Import new pages into an existing batch or document. For instructions on how to replace an existing page, see Replace Page.

To add a page to a batch or document:

1. View the batch or document.
2. Under **Edit** click **Add** . The **Add Page(s)** window opens.
3. Select the desired import options:
    - **Servers:** Optionally specify the server on which to store the image, if you have more than one image server.
    - **Document Type:** Choose the **Document Type**. Leave the **Auto** option set to have the type detected automatically, or specify the type as **GOS** (Generalized Object Storage). See View General Objects for more information on GOS pages.
    - **Storage Type:** Choose the **Storage Type**, specifying what type of storage to use depending on the setup of your system. It is recommended to use the default **Auto**.
    - **Overlays:** Optionally choose one of the **Overlays** to apply to the pages. See View Overlay for more information on overlays.
4. Click **Browse** to browse to a file you want to import as a page. Repeat this process to import multiple files as multiple pages.



5. Click **Add Page(s)**. The selected files are added as pages to the batch or document.

Index Documents

Introduction to Indexing

Index pages from their temporary home in a bin to their permanent home in a file cabinet as documents. Documents are given key information that identifies them called "index values." When you search for a document, you can search on any of the index values.

For example, a *Prescriptions* file cabinet may have the fields:

- *Name:* The name of the customer.
- *RX_ID:* The customer's prescription ID number.
- *Date:* The date the prescription was filled.

When indexing a prescription page in the *Prescriptions* file cabinet, you may give the document index values such as:

- *Name:* Joe Baker
- *RX_ID:* 83423
- *Date:* 01/17/2015

Get started:

- Index pages from a batch into a document in a file cabinet
- Correct indexing mistakes

Alternatively, you can skip the batches and bins and import directly into a file cabinet.

Index Batch

Index pages from their temporary home in a bin to their permanent home in a file cabinet as documents.

To index pages from a batch to a document in a file cabinet:

1. Select the bin to which you want to import the pages. Batches in the bin display.
2. Select one or more batches you want to index using **Select Row** .
3. Right-click and select **Index**. The **Index from** screen displays.
4. Select the file cabinet to which you want to index and click **Select**. The **Index Batch** screen displays.

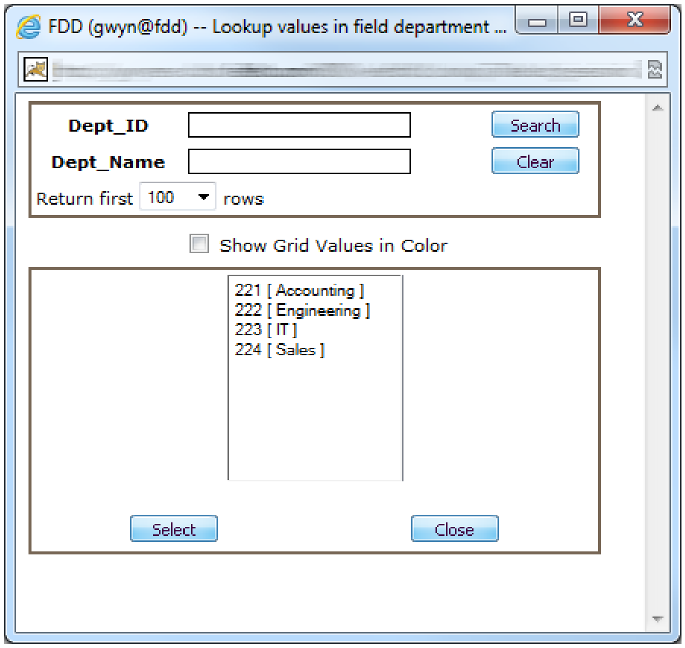
   At any time you may optionally click **Skip** to skip the currently-displayed batch/page or click **Cancel** to return to the bin's batch list.
5. Choose whether you want to index the currently-displayed batch in **Index Batch** mode or **Index Page** mode:
   - **Index Batch:** Index all pages in the batch with the same index values, making all pages in the batch one document in the file cabinet. Do not choose this mode if you need to index different pages in the batch with different index values.
   - **Index Page:** Index the batch page by page, allowing different pages to have different index values which results in different documents in the file cabinet.
6. Enter the index values for the document. Index values are key pieces of information for identifying and finding the document. There are various options for entering index values:
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - If a field has a binoculars icon , click it to choose from a list of suggested values in the **Lookup values** dialog. Note that if the binoculars are red , the value *must* be chosen from the list of suggested values.

     To choose a value from a lookup table:

     In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

     By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

     Select the desired value in the list and click **Select** to insert the value into the field.

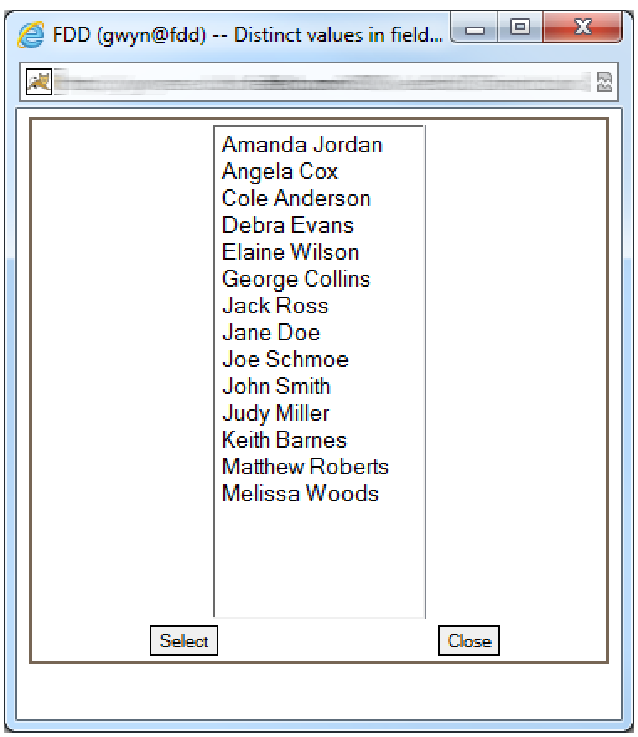


- Select from a list of distinct values that already exist for that file cabinet field by clicking the field name. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



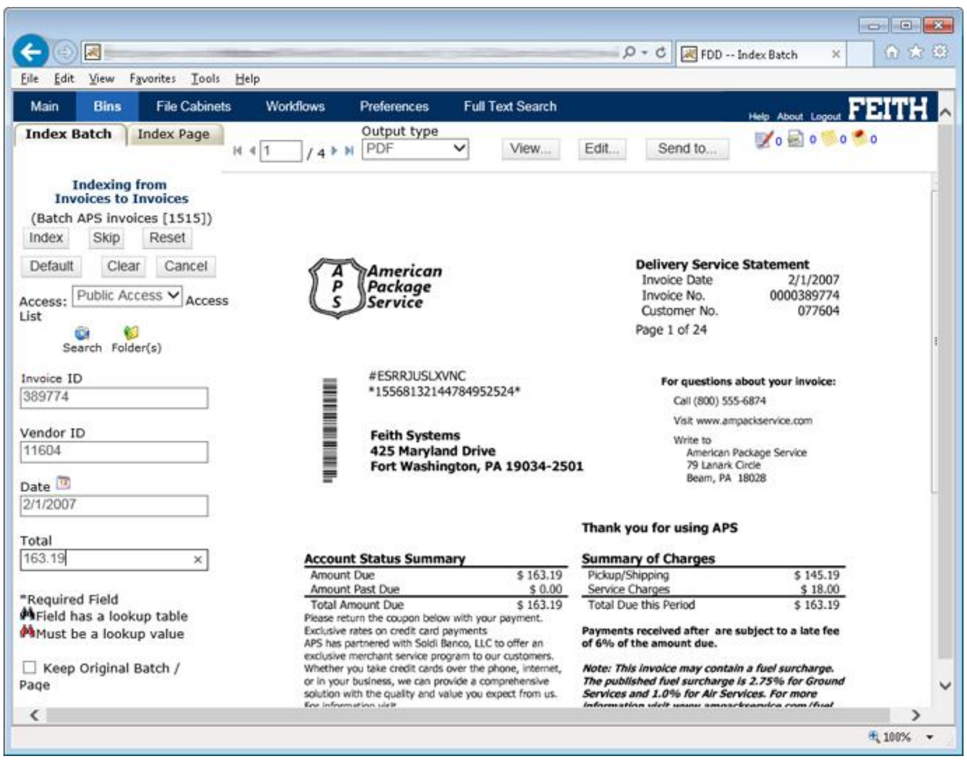
- Note that some index fields may be read-only. You are prevented from entering data into read-only fields.
- If entering multiple values into a list field, enter each value on a separate line using the **ENTER** key.
- Click **Clear** to clear index fields or click **Default** to reset the index fields back to their default values.
- **Note:** If you enter index values identical to an existing document the page(s) will be appended to that document automatically.

7. Select the desired index options:

    - **Access:** Optionally specify document-level permissions by choosing a permission template from the **Access** list.

      It is recommended to use the default **Public Access**. Restricting access to documents using document-level permissions is not normally needed. Document permission templates are created in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

    - **Keep Original Batch/Page:** Turn this option on to keep a copy of the original batch or page (depending on your indexing mode) in the bin. If this option is off, the batch/page will be deleted from the bin once it is indexed.



8. Click **Index**. The page(s) is indexed to a document in the file cabinet.

   Tip: To reindex a document or some of a document's pages into another file cabinet, first route the pages to a bin then index the pages as needed. See Route Document for more information.

Note: You may also index when viewing a batch by clicking **Index**.

Correct Indexing Mistakes

Mistakes can occur during the indexing process. The following are some common mistakes and how to fix them.

Problem: A document was indexed to the wrong file cabinet.

Solution: Route the document to a bin and then index it into the correct file cabinet.

To do this:

1. Search for the document that was indexed to the wrong file cabinet.
2. Select the document then right-click and select **Route**. The **Route Item(s)** window opens.
3. Choose the desired **Target Bin** where the pages will temporarily reside before you index them.
4. Make sure **Route Whole Batch** is on and **Do not delete original** is off.
5. Click **Route**. The pages are routed to the bin.
6. Go to the bin where you routed the pages and index them into the correct file cabinet.

See Search for Documents, Route Document, and Index Batch for more information on searching, routing, and indexing.

Problem: Pages of a batch were indexed together as one document (if the Index Whole Batch option was selected, for example), when they should have been two or more separate documents with different index values.

Solution: Route the pages that were indexed incorrectly to a bin and then index them with the correct index values.

To do this:

1. Search for the document that contains the pages that were incorrectly indexed.
2. Select the document then right-click and select **Route**. The **Route Item(s)** window opens.
3. Choose the desired **Target Bin** where the pages will temporarily reside before you index them.
4. Turn off **Route Whole Batch** and enter the page range that needs to be moved in **From Page...** and **To Page...**. The pages in this range will be routed.
5. Make sure **Do not delete original** is off.
6. Click **Route**. The pages are routed to the bin.
7. Go to the bin where you routed the pages and index them with the correct index values.

See Search for Documents, Route Document, and Index Batch for more information on searching, routing, and indexing.

Problem: A typing mistake or other error caused a document to be indexed with incorrect index values.

Solution: Modify the document's index values to correct the issue.

To do this:

1. Search for the document with the incorrect index values.
2. Select the document then right-click and select **Modify**. The **Modify Indexing Information** screen displays.
3. Change the index values to be correct.
4. Click **Save**. Your changes are saved.

See Search for Documents and Modify Index Values for more information on searching and modifying index values.

Search for Documents

Introduction to Searching

Search a file cabinet to find and view the documents you need. Find documents based on the key information called "index values" or any word in the pages using "full text search."

For example, a *Prescriptions* file cabinet may have the fields:

- *Name:* The name of the customer.
- *RX_ID:* The customer's prescription ID number.
- *Date:* The date the prescription was filled.

When searching for a prescription in the *Prescriptions* file cabinet, you may enter search criteria such as:

- *Date:* 03/07/2015

...and your search returns all prescription documents with that *Date*.

You can make your search very broad by entering few values, or narrow the search by specifying many values. The search results contain only documents that meet all of your search criteria.

Get started:

- Search for Documents
- Search on string values, date values, or number values
- Filter Search Results
- Sort Search Results
- Find a document based on its pages' text

Search for Documents

To search for documents:

1. Select the file cabinet where you want to search. The **Search in File Cabinet** screen displays.

   By default the **Grid** search interface displays. Alternatively, you may use the **Form** or **Advanced** search layouts. See Search Layouts for more information. The default search layout is set in your preferences and can be changed as you desire (see Change Preferences for more information).

2. Enter search criteria in the file cabinet index fields. Index values are key pieces of information for identifying and finding the document (see Introduction to Indexing for more information on index values). You can make your search very broad by entering few values, or narrow the search by specifying many values. There are various options for entering search criteria:

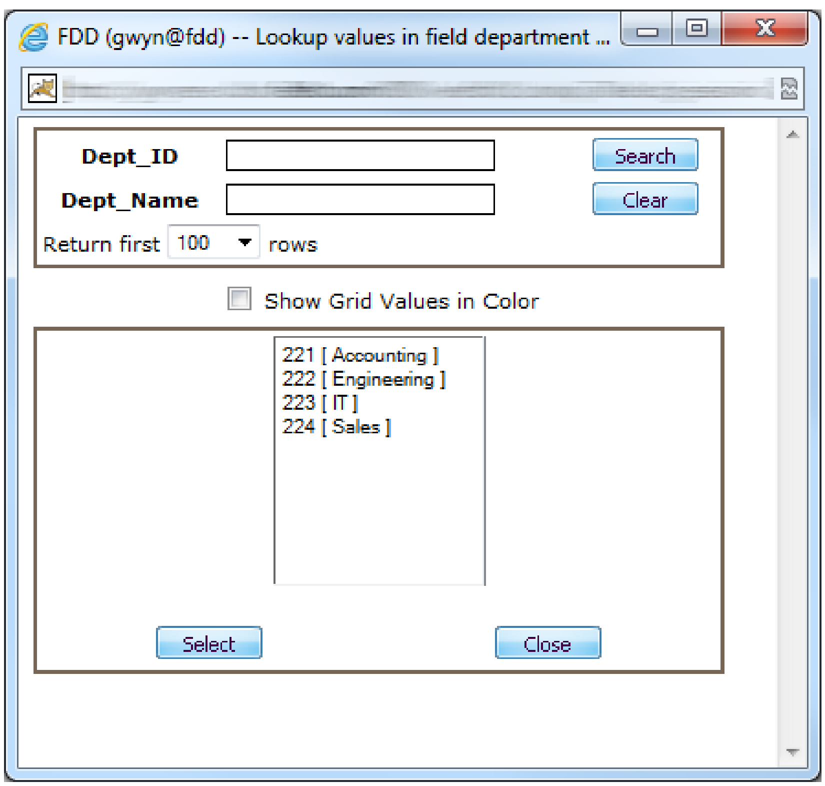
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - Use wildcards, operators, and keywords to help construct your search criteria. See Search on String Values, Search on Date Values, and Search on Number Values for more information.
   - If a field has a binoculars icon, click it to choose from a list of suggested values in the **Lookup values** dialog.

     To choose a value from a lookup table:

     In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

     By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

     Select the desired value in the list and click **Select** to insert the value into the field.

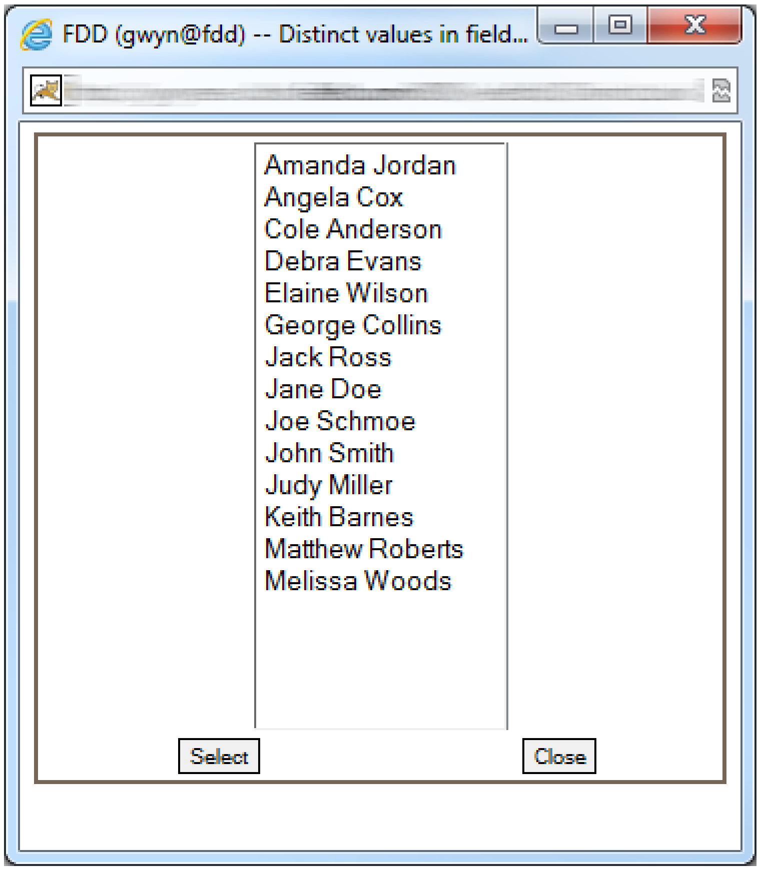


- Select from a list of distinct values that already exist for that file cabinet field by clicking the field name. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

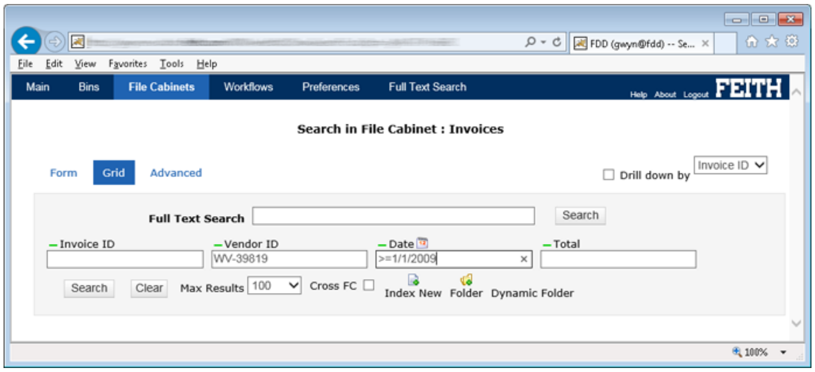
  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



- **Note:** If you enter no search criteria you will perform a "blank" search that will return all documents in the file cabinet. Note that a file cabinet with many documents may take a long time to return the results of a blank search.

3. Optionally enter **Full Text Search** criteria to also search based on the content of the documents' pages. This feature is available if your system is configured with a full text database. See Full Text Search Overview for more information.

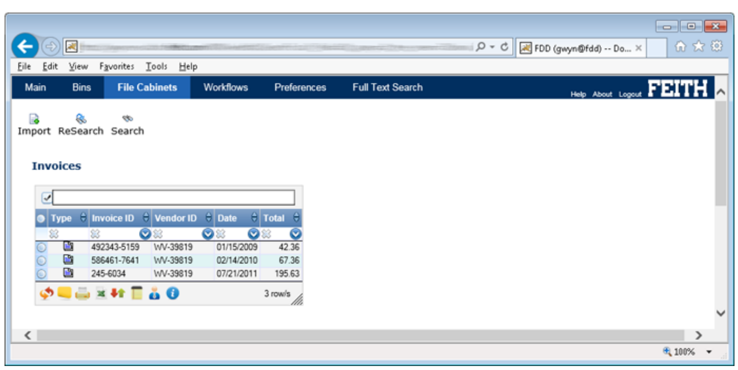


4. Optionally change **Max Results** to set the maximum number of documents that can be returned in a search. The default **Max Results** is set in your preferences and can be changed as you desire (see Change Preferences for more information).

5. Click **Search**. All documents that match your search criteria are listed in the file cabinet grid. Each row is one document. The total number of documents returned is shown in the bottom right of the grid.

   At this point you may view the documents or perform other actions on them (see View Documents for more information). Additionally, you may:

   - Filter the results further to find the documents you need. See Filter Search Results for more information.
   - Sort the documents in your search results by clicking the column headers. See Sort Search Results for more information.
   - Adjust the grid so that the document search results display as desired, such as hiding columns. See The Grid for more information.
   - Click **Search** to return to the search interface and refine your search criteria or do a different search. You may also click **ReSearch** to search again using the same criteria.
   - **Note:** If you entered **Full Text Search** criteria, the document search results will display differently. See Full Text Search Overview for more information.



Note: You may also use alternative searches for finding documents, such as drill down search and cross file cabinet search. See Drill Down Search and Cross File Cabinet search for more information.

Search on String Values

Search more easily on file cabinet string and list of strings fields using wildcards, operators, and keywords. These can be very helpful when you do not know the exact value to search on.

WILDCARD, OPERATOR, OR KEYWORD	DESCRIPTION	EXAMPLE
*	The asterisk replaces any number of characters	Search **Q*** to find values that start with "Q". Search **Jo*n** to find values that start with "Jo" and end with "n", such as Jon, John, Joan, or Jonathan.
?	The question mark replaces a single character	Search **Jo?n** to find values that start with "Jo", have another character, and end with "n", such as John or Joan.
=	Null	Search **=** to find documents where the field is empty, i.e. has no value.
!=	Not null	Search **!=** to find documents where the field is not empty, i.e. has a value.
!= [value]	Not equal to	Search **!=Application** to find values that are not equal to "Application".

Search on Date Values

Search more easily on file cabinet date, datetime, and list of dates fields using operators and keywords. These can be very helpful when you do not know the exact value to search on.

Note: Use keywords without spaces as shown. They may be entered in lowercase or uppercase.

OPERATOR OR KEYWORD	DESCRIPTION	EXAMPLE
>	Greater than	Search **>12/17/2015** to find values after 12/17/2015.
>=	Greater than or equal to	Search **>=12/17/2015** to find values equal to or after 12/17/2015.
<	Less than	Search **<12/17/2015** to find values before 12/17/2015.
<=	Less than or equal to	Search **<=12/17/2015** to find values equal to or before 12/17/2015.
>x<y >=x<=y	Use a combination of greater than >, greater than or equal to >=, less than <, or less than or equal to <= to construct range searches.	Search **>=1/1/2015<4/1/2015** to find values equal to or after 1/1/2015 and less 4/1/2015.
=	Null	Search **=** to find documents where the field is empty, i.e. has no value.
!=	Not null	Search **!=** to find documents where the field is not empty, i.e. has a value.
!= [value]	Not equal to	Search **!=Application** to find values that are not equal to "Application".
today	Date values from today	If today is 5/1/2015, search **today** to find values equal to 5/1/2015.
thisweek	Date values from this week, Sunday to Saturday	If today is 5/1/2015, search **thisweek** to find values greater than or equal to 4/26/2015 and less than or equal to 5/2/2015.
thismonth	Date values from this month	If today is 5/1/2015, search **thismonth** to find values greater than or equal to 5/1/2015 and less than or equal to 5/31/2015.
thisyear	Date values from this year	If today is 5/1/2015, search **thisyear** to find values greater than or equal to 1/1/2015 and less than or equal to 12/31/2015.

Search on Number Values

Search more easily on file cabinet decimal, integer, money, and list of numbers fields using operators. These can be very helpful when you do not know the exact value to search on.

OPERATOR	DESCRIPTION	EXAMPLE
>	Greater than	Search **>1000** to find values greater than 1,000.
>=	Greater than or equal to	Search **>=1000** to find values greater than or equal to 1,000.
<	Less than	Search **<1000** to find values less than 1,000.
<=	Less than or equal to	Search **<=1000** to find values less than or equal to 1,000.
>x<y >=x<=y x:y	Use a combination of greater than >, greater than or equal to >=, less than <, or less than or equal to <= to construct range searches. You can also use the colon to construct range searches. Note that results will include values equal to the numbers on either side of the colon.	Search **>1000<=5000** to find values greater than 1,000 and less than or equal to 5,000. Search **1000:5000** to find values greater than or equal to 1,000 and less than or equal to 5,000.
=	Null	Search **=** to find documents where the field is empty, i.e. has no value.
!=	Not null	Search **!=** to find documents where the field is not empty, i.e. has a value.
!= [value]	Not equal to	Search **!=1000** to find values that are not equal to "1000".

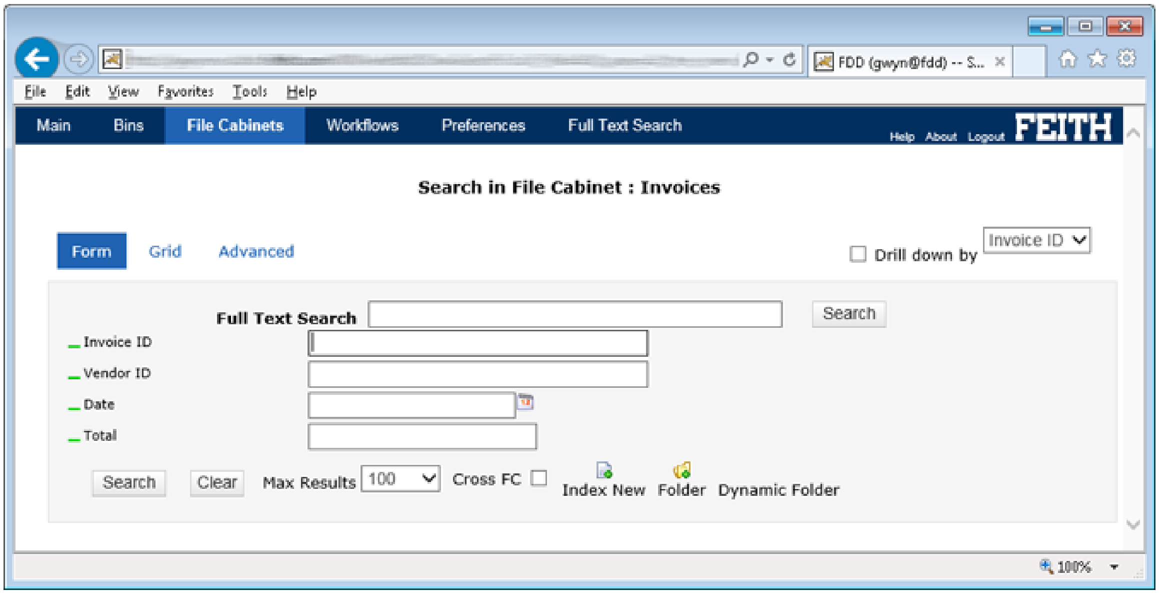
Search Layouts

Search for documents with your preferred search layout. The search layouts are: Form, Grid, and Advanced.

The default search layout is set in your preferences and can be changed as you desire. See Change Preferences for more information.

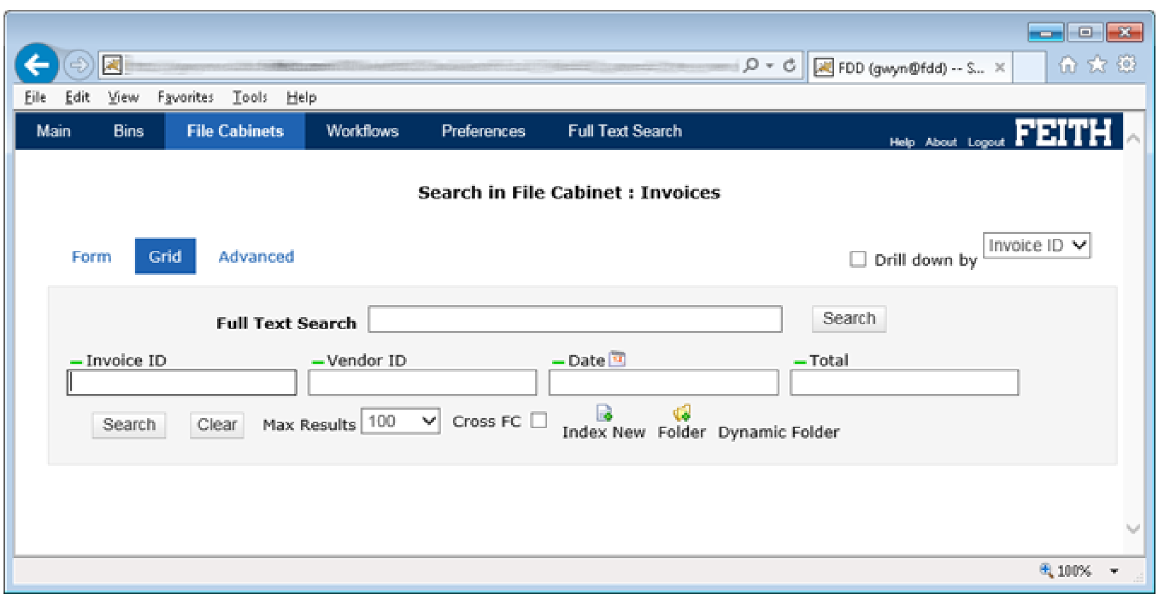
Form Search Layout

Displays the file cabinet fields in a vertical, form layout.



Grid Search Layout

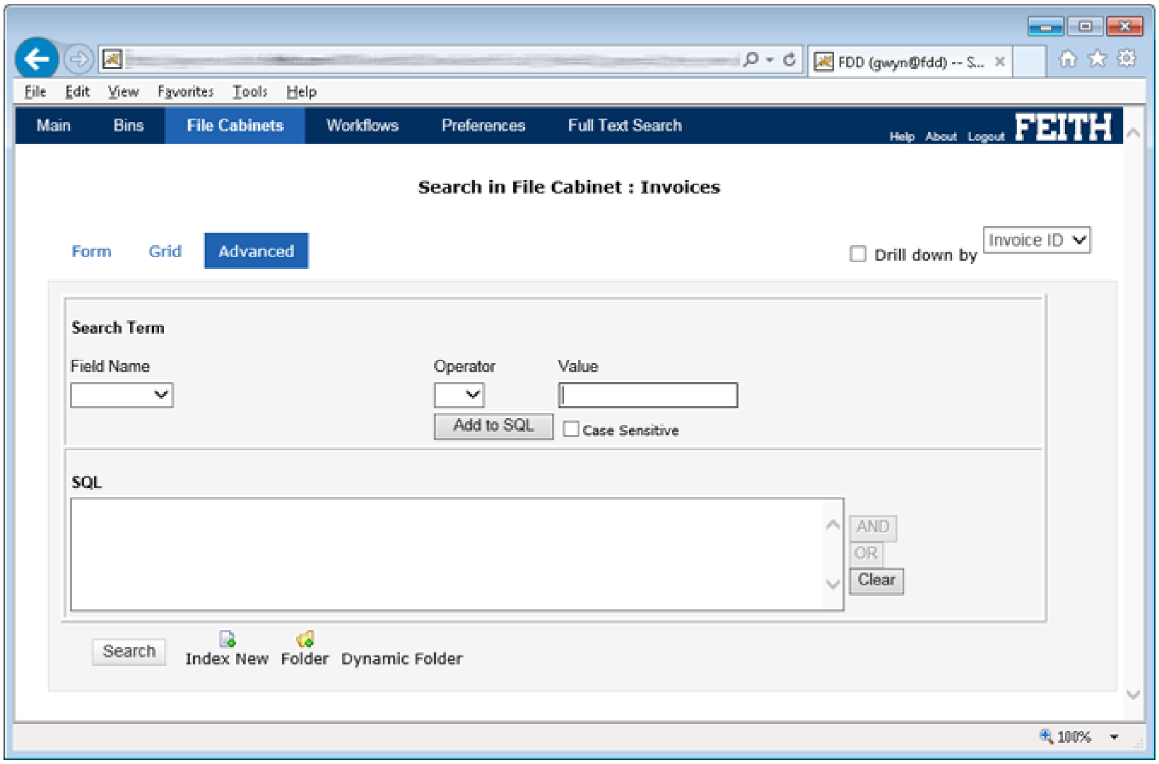
Displays the file cabinet fields in a horizontal, grid layout.



Advanced Search Layout

Build a SQL (Structured Query Language) query to do more a more complex search. Individual search terms can be combined using AND and OR operators. See Advanced Search for more information.

Note: The **Advanced** search layout is only available for file cabinets; it is not available for workflow tasks.



Filter Search Results

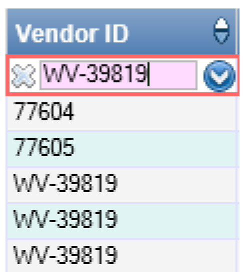
After searching in a file cabinet, filter the results further to find the documents you need. You can filter on one or more specific columns or run one filter that looks at all columns.

Filter a Column

To filter on one or more specific columns:

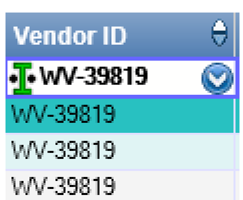
1. In the file cabinet search results, at the top of the column either:

   - Double-click in the filter cell and enter the value you want to filter on and hit the **ENTER** key.

   - Select from a list of values by clicking .

2. The grid is filtered on the selected value, displaying documents equal to or containing the value. Optionally click the icon to the left of the value to change the operator. If you selected from the list of values, an operator is chosen for you and you may change it.

3. Optionally filter on more columns following the same steps.

   To turn off the filter while keeping the currently-entered value, click the operator icon and select **Off**.

   To clear the filter and see all values in the column again, click and select **(All)**.

Filter Across All Columns

To filter across all columns:

1. Double-click in the filter field across the top of the grid.

2. Enter the value you want to filter on and hit the **ENTER** key. The grid is filtered on the selected value, displaying documents that contain the value in any of the columns.

To turn off the filter while keeping the currently-entered value, uncheck the checkbox to the left of the value.

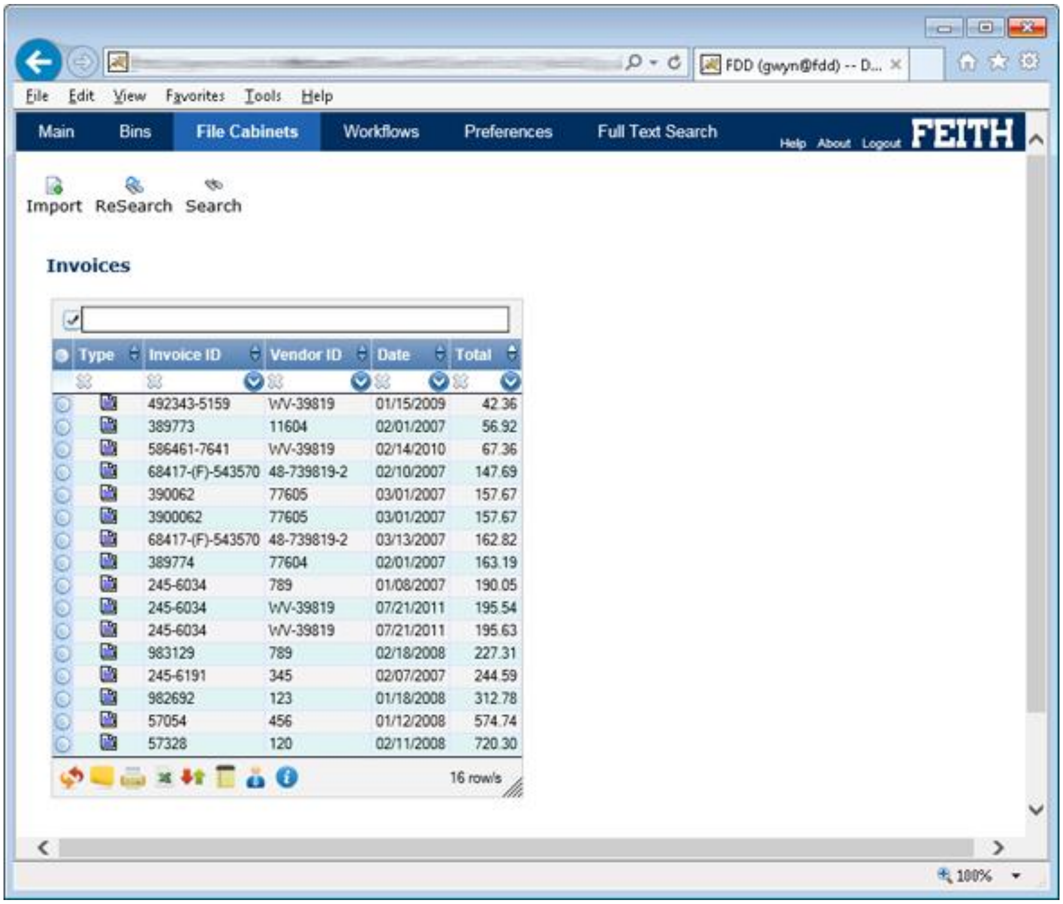
To clear the filter and see all values, double-click in the filter field then click the **X** to the right of the value.

Sort Search Results

Order the documents in your search results by sorting them. You can sort search results ascending or descending and you may sort by multiple columns.

To sort documents by one or more file cabinet field columns:

1. Click on the column header. The documents are sorted.



2. Optionally click the column header again to change the direction of the sort.

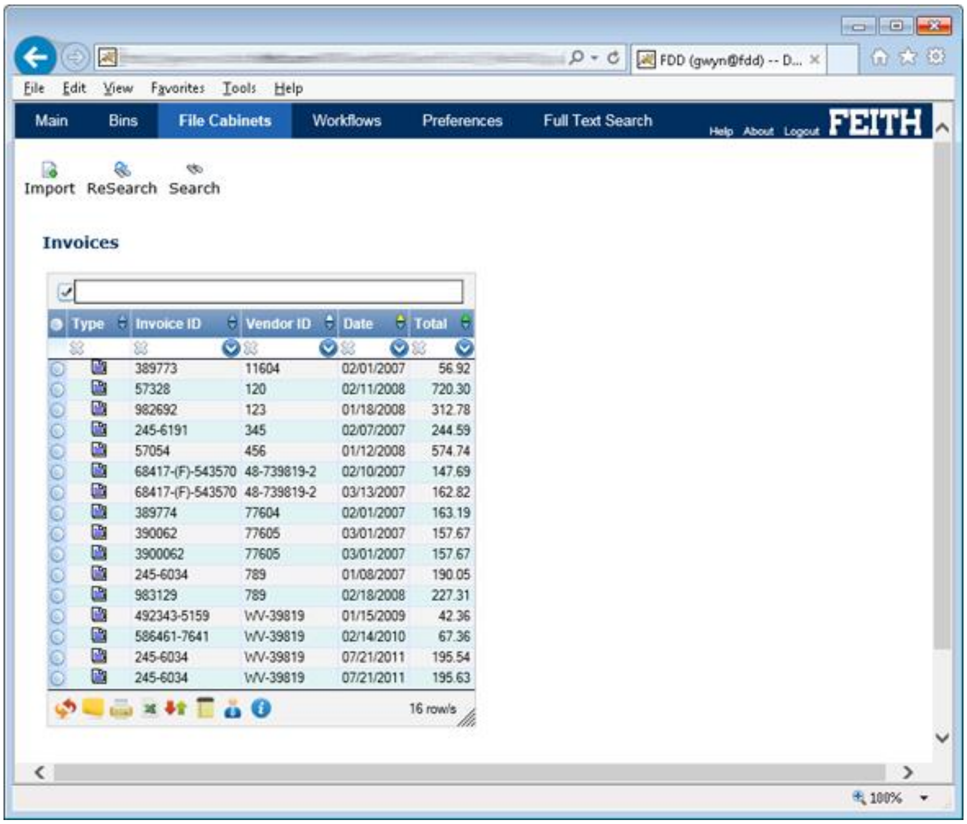
   The sort indicator in the column header shows the direction of the sort:

   - Ascending sort with the up arrow highlighted.
   - Descending sort with the down arrow highlighted.

3. Optionally click other column headers to do a multi-column sort. You may sort on up to three different columns. The most recently-clicked column is the primary sort.

   The sort indicator in the column header shows the order in which the columns are applied to the sort:

   - Primary sort column in white.
   - Secondary sort column in yellow.
   - Tertiary sort column in green.



Advanced Search

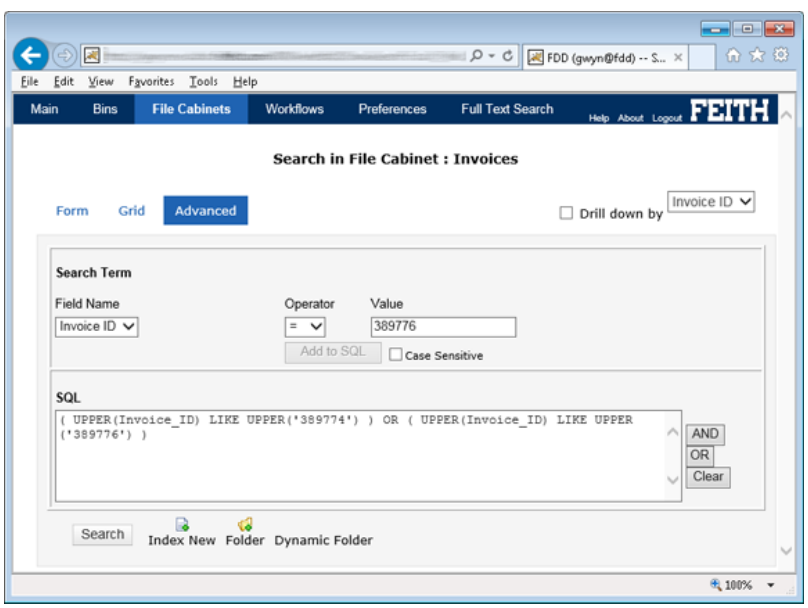
Use **Advanced Search** to construct more complex search queries. Individual search terms can be combined using AND and OR operators.

To perform an **Advanced Search**:

1. Select the file cabinet where you want to search. The **Search in File Cabinet** screen displays.
2. Click **Advanced**. The **Advanced** search layout displays.

   See [Search Layouts]() for more information. The default search layout is set in your preferences and can be changed as you desire (see [Change Preferences]() for more information).
3. In the **Search Term** section, select a **Field Name**, **Operator**, and **Value**:
   - **Field Name:** Select a file cabinet field.
   - **Operator:** Select an operator. Available operators include:
     - **=** equal to
     - **<>** not equal to
     - **>** greater than
     - **>=** greater than or equal to
     - **<** less than
     - **<=** less than or equal to
     - **is NULL**
     - **is NOT NULL**
   - **Value:** Enter a value. Use the **Date Picker** to enter a value for a date or datetime field.
4. Click **Add to SQL**. The search term is added to the **SQL** field.
5. Optionally click **AND** or **OR** and add more search terms as desired.

   If you have permission, you may edit the **SQL** (Structured Query Language) directly.



6. Click **Search**. All documents that match your search criteria are listed in the file cabinet grid.

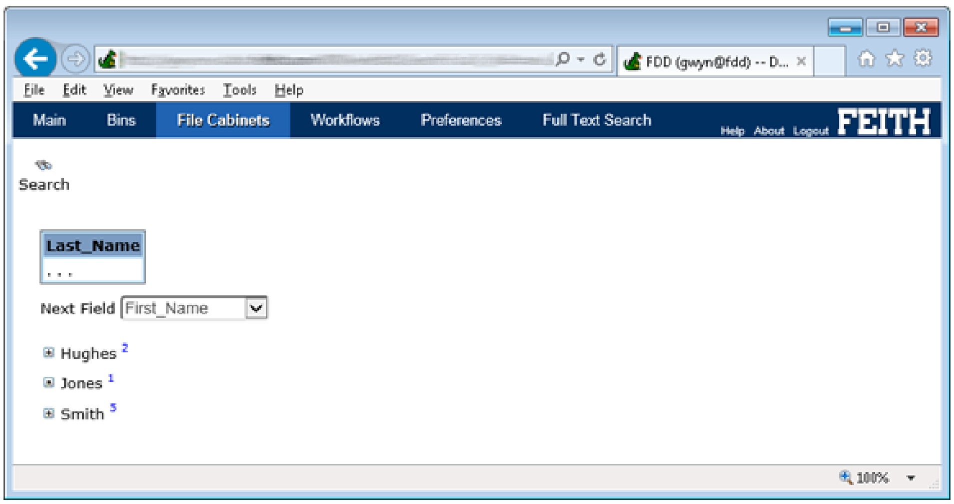
Drill Down Search

Drill down on distinct values to search using a browsing style navigation of documents, as an alternative to structured and full text searches.

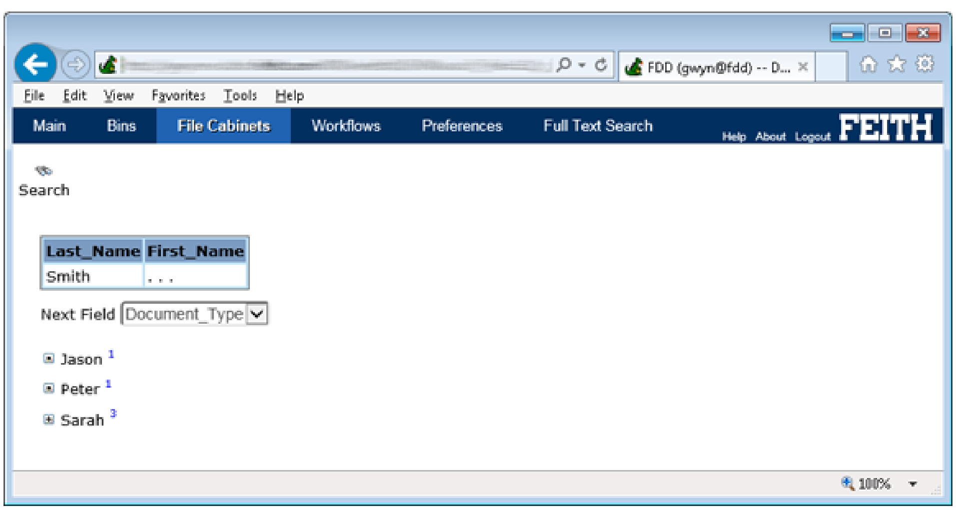
To perform a drill down search:

1. Select the file cabinet where you want to search. The **Search in File Cabinet** screen displays.
2. Check the **Drill down by** option and select a field from the list.
3. Optionally enter search criteria in one or more file cabinet fields to narrow down the list of values returned. See Search for Documents for more information on entering search criteria.
4. Click **Search**. The list of distinct values for the selected field display with a count of how many documents are in each value. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

   At any time when drilling down, click a value to view its documents.



   As desired, continue to drill down by selecting the **Next Field** you want to drill down to and then click next to the value you want to drill down on (e.g. drill down to First Names for Last Name "Smith"). Note that if the icon is instead, then there is only one document and clicking the icon will take you to that document directly.



Cross File Cabinet Search

Search multiple file cabinets using the search criteria from one file cabinet based on common field names.

To perform a cross file cabinet search:

1. Select the file cabinet where you want to search. The **Search in File Cabinet** screen displays.
2. Enter search criteria in one or more file cabinet fields. See Search for Documents for more information on entering search criteria.
3. Check the **Cross FC** option.
4. Click **Search**. Any file cabinet that has fields in common (i.e. the same name) with those where you entered criteria is searched and the results from one or more file cabinets are returned in a single list.

Full Text Search

Full Text Search Overview

Note: These instructions refer to the optional products Autonomy IDOL, Elasticsearch, and Feith Universal Text Recognition (UTR).

Feith offers a full text alternative to structured file cabinet searches. Instead of searching for documents by their index values, users can search for documents by their text content.

Full text search runs on one of two engines: Elasticsearch or Autonomy IDOL. Feith UTR adds the documents' data to the full text engine.

Get started:

- Do a full text search
- Use search techniques to refine your search

The FDD administrator configures bins and/or file cabinets to automatically add data to the full text database. See the Feith Control Panel User Guide for more information.

Note: If you are full text indexing pages with redaction notes and you have FDD users who do *not* have permission to see below the redaction notes but they can full text search for or look at those pages, then we recommend a separate "reading room" FDD system for those FDD users.

Perform Full Text Search

Note: These instructions refer to the optional products Autonomy IDOL, Elasticsearch, and Feith Universal Text Recognition (UTR).

Users can perform a full text search on either all documents in the system (a "global" full text search) or in a specific file cabinet. When full text searching in a specific file cabinet, additional search criteria can be entered in the file cabinet fields.

See the following for instructions:

- Full Text Search Tab
- Full Text Search in Specific File Cabinet
- More Global Full Text Searches

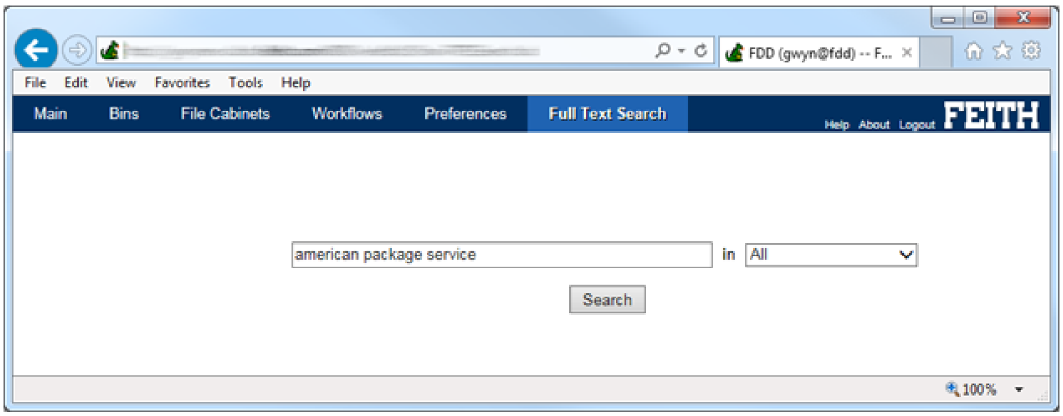
Full Text Search Tab

To perform a search in the Full Text Search tab:

1. Go to the **Full Text Search** tab.

2. Enter your search criteria. See Full Text Search Techniques for more information on full text search techniques to refine your search.

3. Search across **All** bins and file cabinets or optionally specify one file cabinet you want to search in.

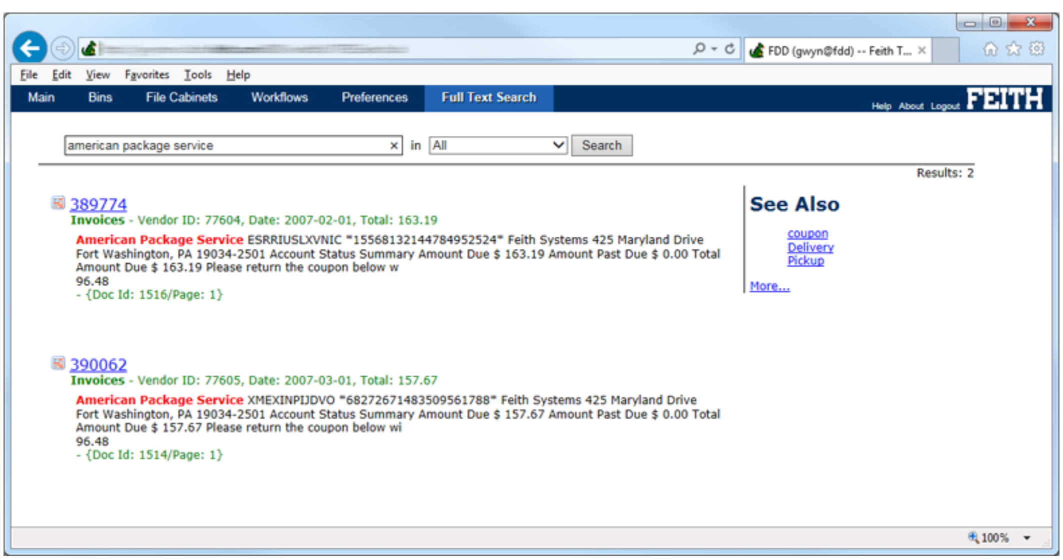


4. Click **Search**. All items that match your search criteria are listed, including the item's information and a text summary. The total number of items returned is shown in the upper right-hand corner of the screen.

   At this point you may view an item by clicking its title. Alternatively, click [icon] to view the full text of the item with your search criteria highlighted.

   You may change your search criteria and do another search. The **See Also** section suggests terms to help narrow your search. To add a suggested term to your search criteria, click the desired term and the new search is performed automatically.

   Note: If you do not have the **See Also** section, then the feature has been hidden.

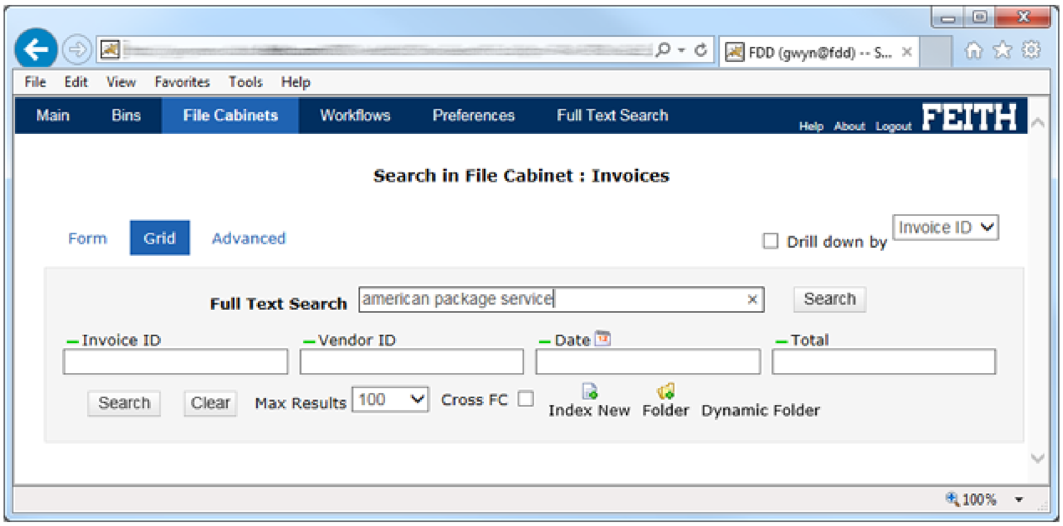


Full Text Search in Specific File Cabinet

To perform a full text search in a specific file cabinet:

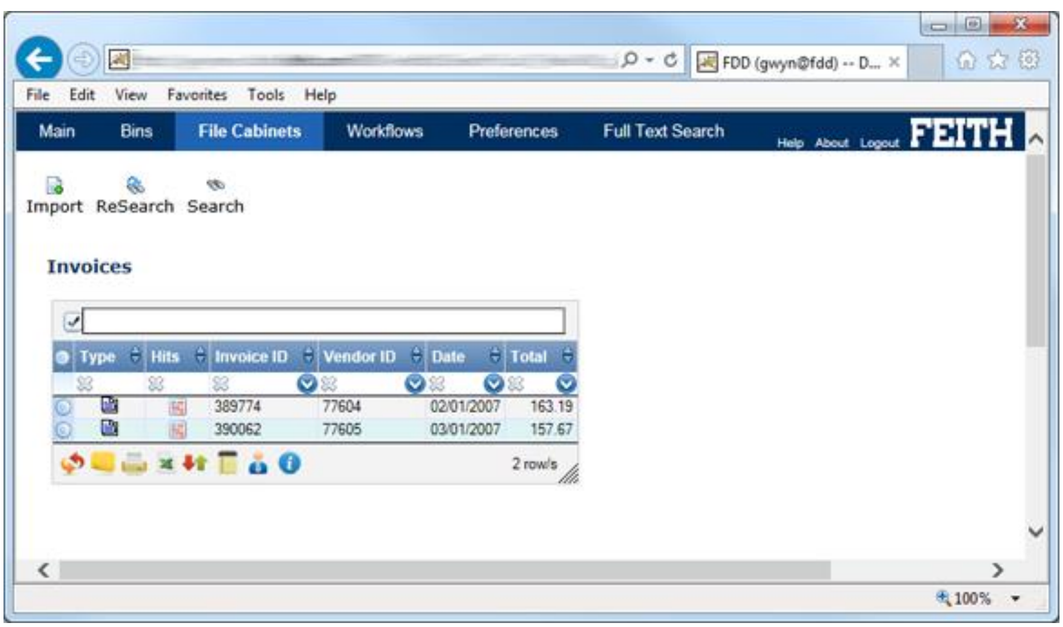
1. Go to the **Search in File cabinet** screen of a specific file cabinet.
2. Enter your search criteria in the **Full Text Search** field and optionally enter additional search criteria in the file cabinet index fields.

   See Full Text Search Techniques for more information on full text search techniques to refine your search.



3. Click **Search**. All documents that match your search criteria are listed in the file cabinet grid (see The Grid for more information).

   You can click  to view the full text of the document with your search criteria highlighted. You may change your search criteria and do another search.



More Global Full Text Searches

Besides searching **All** in the **Full Text Search** tab, you can also perform a global full text search in the **Main**, **Bins**, or **File Cabinets** tabs.

To perform a global search in one of the other tabs:

1. Go to the **Main**, **Bins**, or **File Cabinets** tab.

2. Enter your search criteria in the **Full Text Search** field at the top.

   See Full Text Search Techniques for more information on full text search techniques to refine your search.

3. Click **Search**. All items that match your search criteria are listed, including the item's information and a text summary. The total number of items returned is shown in the upper right-hand corner of the screen.

   At this point you may view an item by clicking its title. Alternatively, click to view the full text of the item with your search criteria highlighted.

   You may change your search criteria and do another search. The **See Also** section suggests terms to help narrow your search. To add a suggested term to your search criteria, click the desired term and the new search is performed automatically.

   Note: If you do not have the **See Also** section, then the feature has been hidden.

IDOL Search Techniques

These instructions refer to the optional product Autonomy IDOL.

If your system is configured for **Autonomy IDOL**, you can use keywords, wildcards, and other techniques to refine your searches. Also, you should be aware of specific IDOL behaviors, such as case-insensitivity and stemming. Refer to the Autonomy IDOL documentation for more information on searching in IDOL.

Case-Insensitivity

IDOL searches are case-insensitive. For example, searching for **cat** will return documents containing **cat**, **CAT**, and **Cat**.

Words and Phrases

IDOL will stem search results, looking for different forms of the words entered in your search criteria. For example, searching for **spelunk** will also return documents containing **spelunking** and **spelunker**.

To search for a phrase exactly as it appears, contain the terms in double quotes. For example, search for **"spelunking is fun"**.

Keywords

AND	Finds documents that only contain all of the terms. For example, **radio AND television** will return documents that contain both the words **radio** and **television**. It will not return documents with only the word **radio**, nor will it return documents with only the word **television**.
OR	Finds documents that contain any one of the terms. For example, **radio OR television** will return any document that contains at least one of the two words.
NOT	Finds documents that do not contain the specified term. For example, **radio NOT television** will return documents that contain **radio** and do not contain **television**.
EOR *or* **XOR**	Finds documents that only contain one of the terms. For example, **radio EOR television** will return documents only containing the word **radio** or documents only containing the word **television**. It will not return documents that contain both **radio** and **television**.
BEFORE	Finds documents in which one term precedes another term. For example, **radio BEFORE television** will return documents where the word **radio** appears before the word **television**.
AFTER	Find documents in which one term comes after another term. For example, **radio AFTER television** will return documents where the word **radio** appears after the word **television**.

NEAR*N*	Finds documents in which one term is within ***N*** words of another term. For example, **radio NEAR5 television** will return documents where the word **television** appears within five words (before or after) of **radio**.
DNEAR*N*	Finds documents in which one term occurs within ***N*** words after another term. For example, **radio DNEAR5 television** will return documents where the word **television** appears within five words after **radio**.

Notes:

- When multiple words are entered as search criteria without a keyword, the default behavior is an **OR** search.
- A keyword must be entered in all capital letters to be recognized.
- Refer to Autonomy IDOL documentation for other keywords.

Wildcards

*****	Indicates zero or more of any alphanumeric character. For example, **fun*** will return **fun**, **funny**, and **funnel**.
?	Indicates one of any alphanumeric character. For example, **?an** will return **ran**, **pan**, **can**, and **ban**.

Grouping

Use parentheses, **(** and **)**, to specify grouping and ordering of search terms. Grouping is very useful in situations where evaluation order makes a difference in the meaning of a query.

For instance, consider the query:

pet AND cat OR dog

One possible outcome of the above statement is:

(pet AND cat) OR dog

In this case, the search will return documents that either contain both the words **pet** and **cat**, or documents that contain the word **dog**.

The other possible outcome is:

pet AND (cat OR dog)

This query will return all pages that contain the word **pet**, and also mention either **cat** or **dog**.

It is a better practice to specify exactly the search that you want to perform, rather than letting your search be misinterpreted. You can use parentheses as demonstrated above to indicate explicitly which words belong together.

Note: To use other query types supported by Autonomy IDOL (e.g. Soundex, Synonym, Proper Names), additional configuration may be required. Refer to the Autonomy IDOL documentation for more information.

View Documents

View Documents

View one or more documents in the system. See View a Single Document and View Multiple Documents for more information.

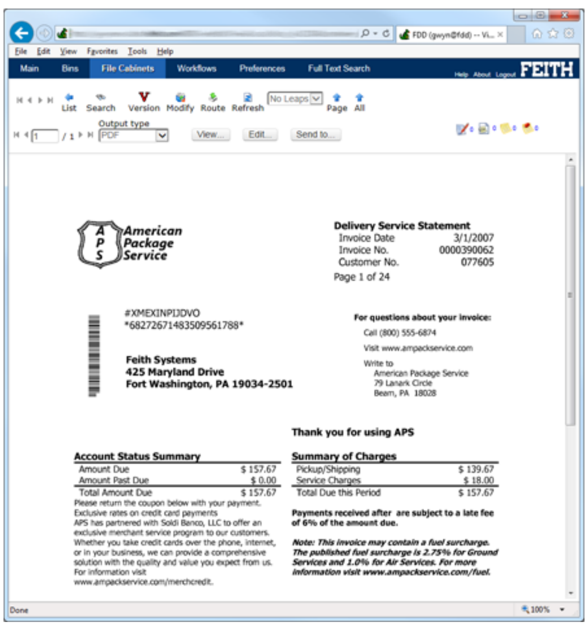
If you want to view a batch or a workflow document in a task, see View Batches and View Workflow Document in Task for more information.

View a Single Document

To view a single document:

1. Search for a document. The search results display. See Search for Documents for more information.
2. Left-click a document in the file cabinet grid to view it. The document displays in the **View Document** screen.

   Note: If you would prefer the document to open in a new window, you may turn on the **Open Documents in New Window** option in your **Preferences**. See Change Preferences for more information.

   You may choose from various view options and perform other functions:

   - Under **View**, choose to display the document in **Single** page, **All** pages, or **Mini** pages view mode. See View Modes for more information.
   - Under **View**, you may click **Pop** to open the page in a new browser window. You may set the document to always open in a new browser window in **Preferences** (see Change Preferences for more information).

     Note: This option is only available when in **Single** page view mode or **All** page view mode.

   - Click **Page** to hide the page controls or **All** to hide all controls.
   - If your search returned multiple documents, navigate through the list of documents using the arrows .

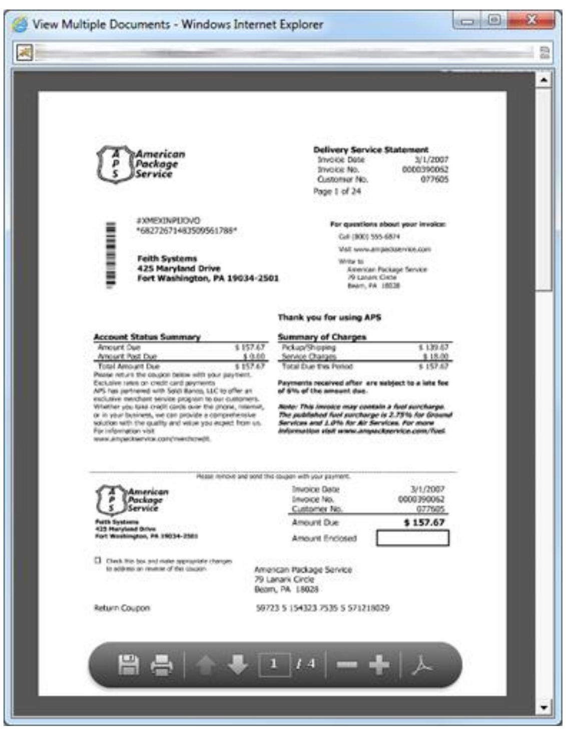
- Click **List** to return to the search results list or click **Search** to return to the search interface and do another search.
- **Version** the document. See Versioning Introduction for more information.
- **Modify** the document's index values. See Modify Index Values for more information.
- **Route** the document to a bin. See Route Document for more information.
- Select from the list of **Leaps** to perform a leap on the document. See Leaps for more information.
- See The View Window for more information on other controls and functions, such as rotating pages, reordering pages, adding pages, emailing, exporting, notes, etc.
- **Note:** If you see the **General Object** page instead of the page itself, the page is GOS (a General Object). See View General Objects for more information.

View Multiple Documents

To view multiple documents:

1. Search for the documents. The search results display. See Search for Documents for more information.
2. Select the multiple documents using **Select Row** .
3. Right-click one of the documents and select **View**. The **View Multiple Documents** window opens and the documents display.

   Navigate through the pages in the documents using the controls provided by Adobe Reader in the browser.



View Modes

Change how the document is displayed by choosing the desired view mode. The view modes are: Single page, All pages, and Mini pages.

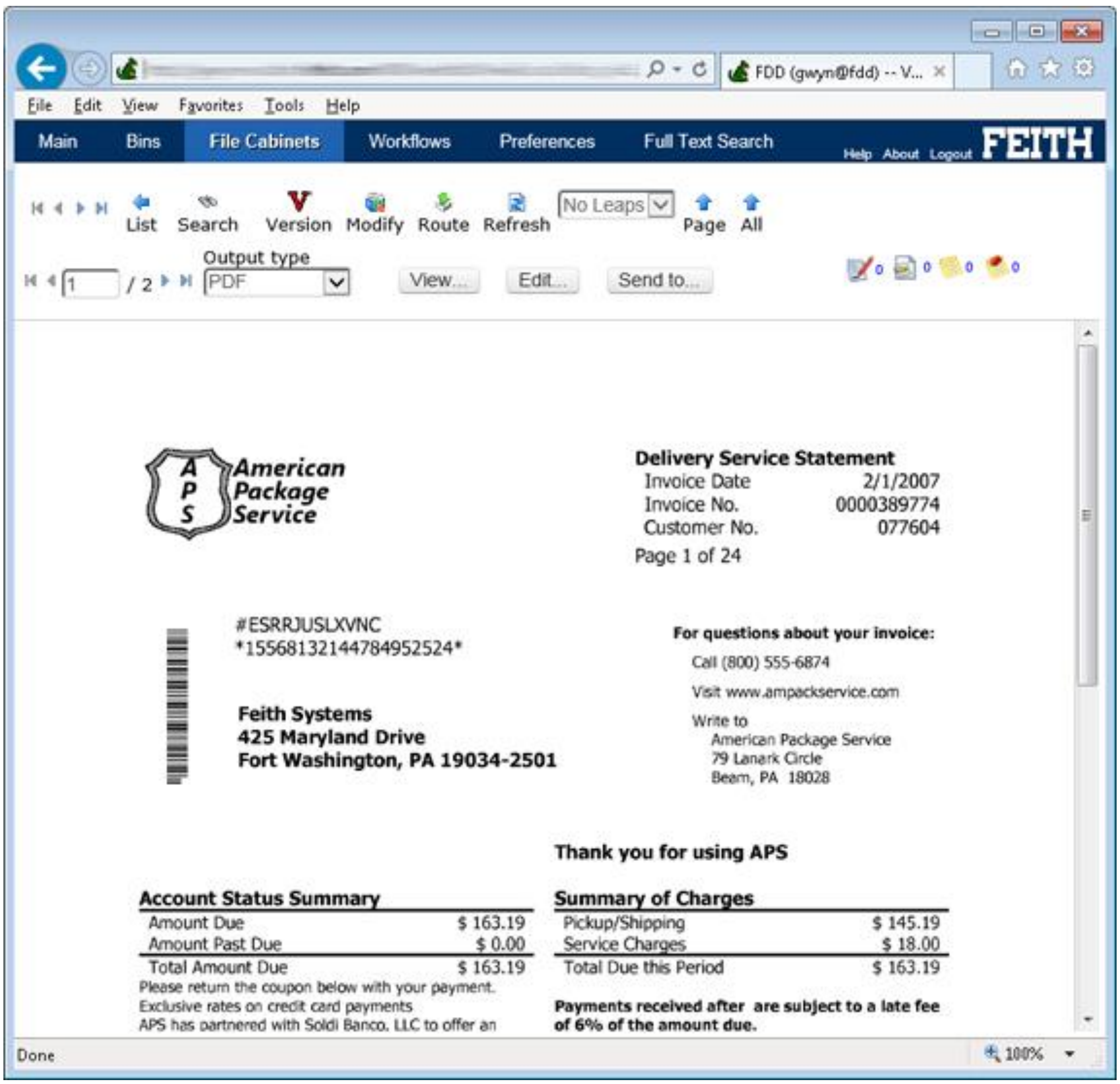
You may set your preferred default viewing mode in **Preferences**. See Change Preferences for more information.

Single Page View Mode

View each page of the document separately. When viewing a document, under **View** click **Single** to view the document in **Single** page view mode.

The default **Output Type** is PDF. When viewing a document with multiple pages, each page will be rendered as a separate PDF.

Navigate through the pages in the document using the page navigation arrows 1 / 2 or type the number of the page where you want to go.



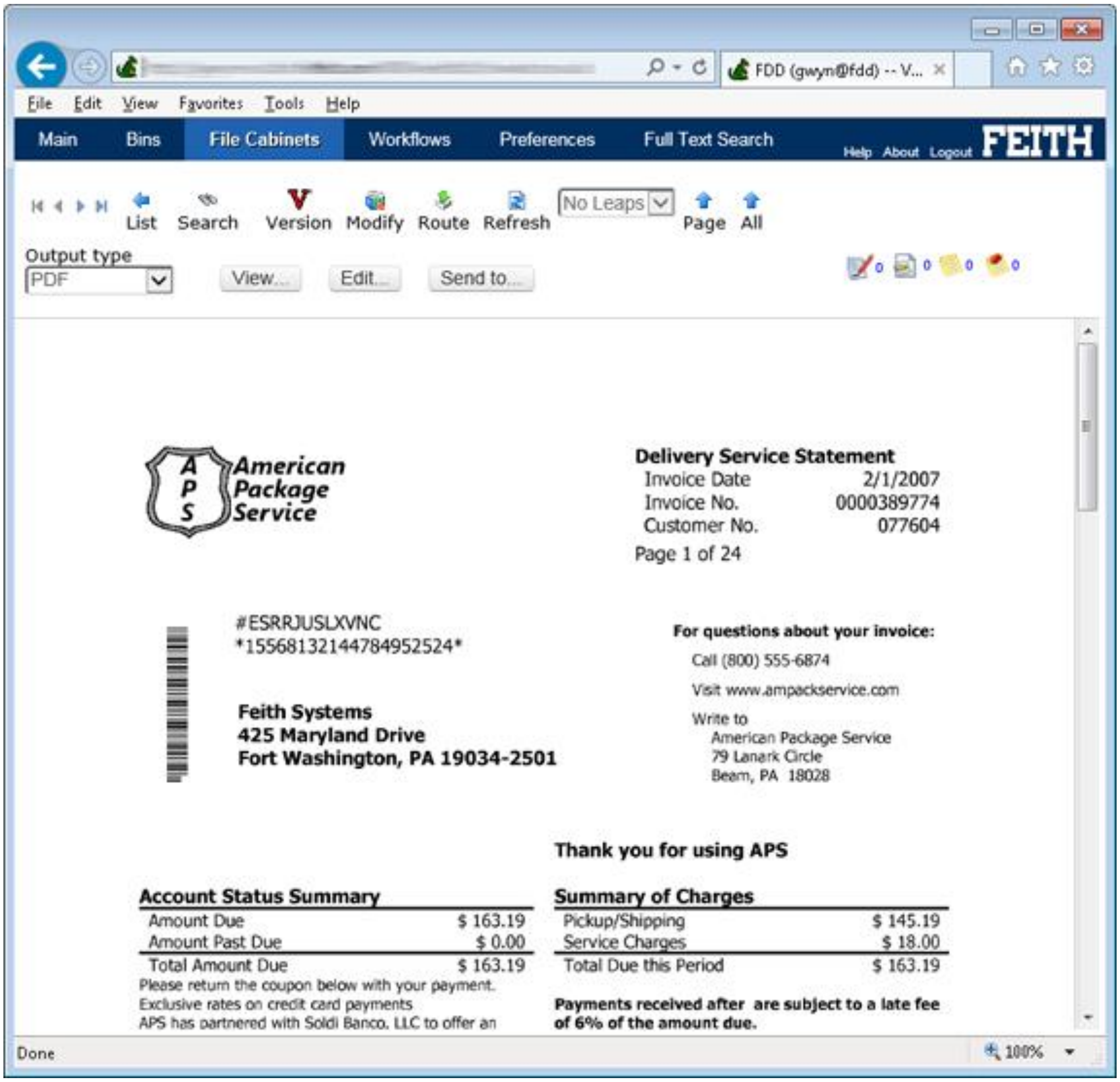
All Pages View Mode

View all pages of the document in a single output. When viewing a document, under **View** click **All** to view the document in **All** pages view mode.

The default **Output Type** is PDF. When viewing a document with multiple pages, all pages will be rendered as a single PDF.

Navigate through the pages in the document using the controls provided by Adobe Reader in the browser.

Note: The **Display GOS Objects** option does not apply in this view mode. Therefore, the GOS information page is shown instead for GOS pages.



Mini Pages View Mode

View all pages in the document in miniature. When viewing a document, under **View** click **Mini** to view the document in **Mini** pages view mode.

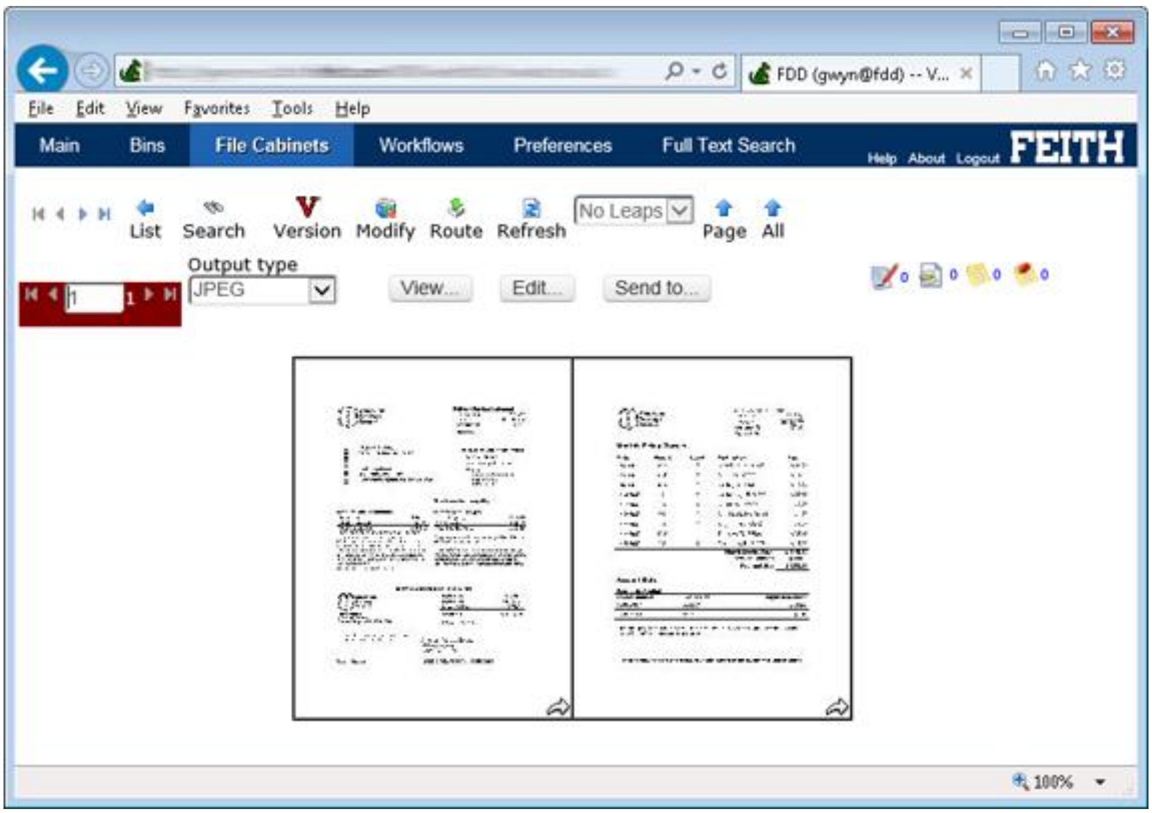
The default **Output Type** is **JPEG**. When viewing a document with multiple pages, each page is rendered as a separate JPEG and the pages are shown in sets.

Use the scroll bar to view all the pages in a set. Navigate through the page sets using the set navigation arrows or type the number of the page set where you want to go.

Click a page thumbnail to view the specific page in a new window, or click to view the specific page in the current window.

The number of pages displayed per page set and the size of the thumbnails may be changed in your **Preferences**. See Change Preferences for more information.

Note: The **Display GOS Objects** option does not apply in this view mode. Therefore, the GOS information page is shown instead for GOS pages.

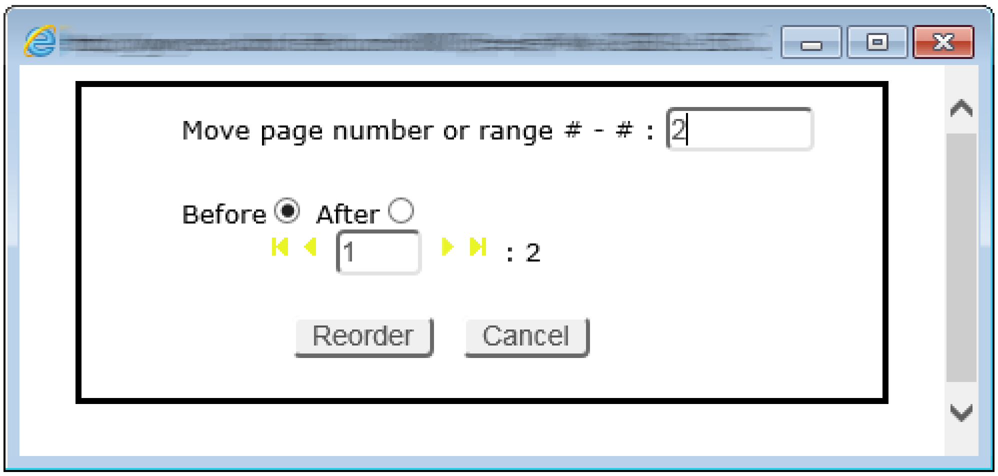


Reorder Pages

Rearrange pages within a document.

To reorder pages:

1. View a document. See View Documents for more information.
2. Under **View** click **Reorder** . The **Reorder Pages** window opens.
3. In the **Move page number or range** field, type the number of the page, or the range of pages, you want to reorder.
4. Select whether to insert the selected page(s) **Before** or **After** another page.
5. Enter the number of the page that the other page(s) will be moved next to (whether **Before** or **After**).



6. Click **Reorder**. The pages are reordered.

Rotate Page

Rotate image pages. This may be useful if pages were scanned into the system upside-down.

To rotate a page:

1. View a document. See View Documents for more information.
2. Under **View** choose to rotate the page **Left** or **Right** . The page is rotated in the chosen direction 90 degrees and the new rotation setting is remembered.

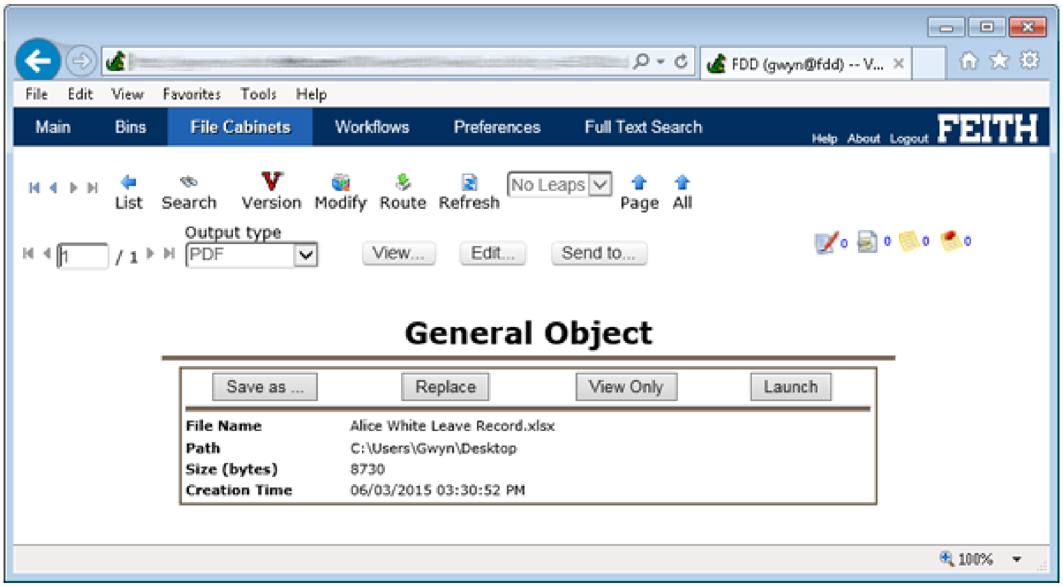
Note: This option is only available when in **Single** page view mode. See View Modes for more information on view modes.

View General Objects

General Objects (GOS) are Windows-type electronic files such as word-processing documents or spreadsheets.

To view a GOS page:

1. View the GOS page (see View Documents for more information). The **General Object** information page displays instead of the page itself.



2. Click **View Only**. The GOS page is opened in the application that is associated with its file type in the operating system (e.g. a DOC opens in Microsoft Word). This might be the application that was used to create the file or a third-party viewing application.

   Alternatively, click **Save** as to save the GOS object to your local machine or click **Replace** to replace the existing page (see Replace Page for more information).

You may optionally always have WebFDD attempt to display the GOS page in the browser by turning on the **Display GOS Objects** preference. See Change Preferences for more information.

Manage Documents

Modify Index Values

Document index values, also referred to as document metadata, can be modified to correct an indexing mistake or to enter new information for a document. Note that only users with the appropriate task and resource permissions may modify index values.

To modify the index values of a document:

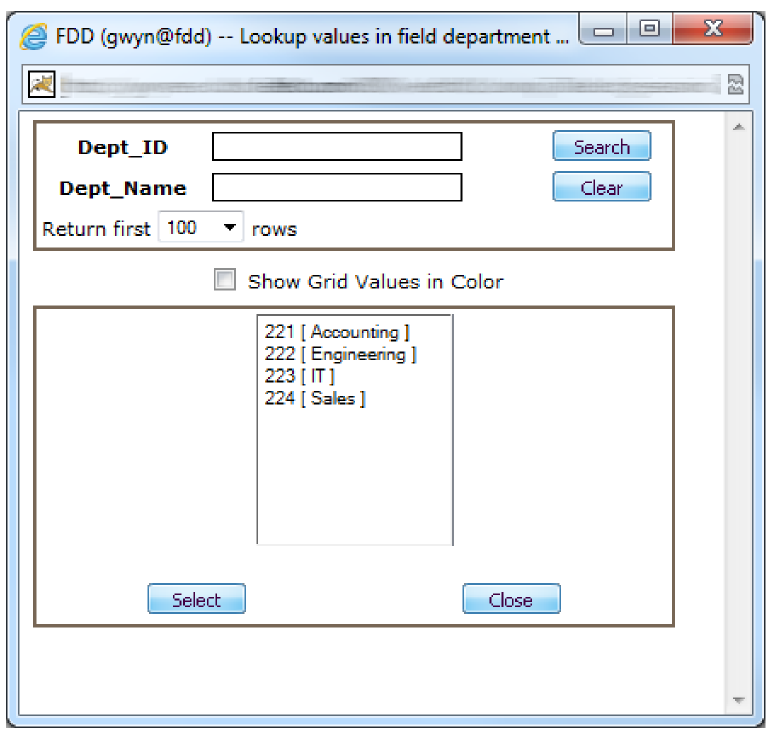
1. Search for the document where you want to modify the index values. See Search for Documents for more information.
2. Select the desired document by clicking **Select Row** .
3. Right-click the document and select **Modify**. The **Modify Indexing Information** screen displays.
4. Enter or change index field values as desired. There are various options for setting index values:
    - Type into the fields.
    - Use the **TAB** key to move from one field to the next.
    - If a field has a binoculars icon , click it to choose from a list of suggested values in the **Lookup values** dialog. Note that if the binoculars are red , the value *must* be chosen from the list of suggested values.

      To choose a value from a lookup table:

      In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

      By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

      Select the desired value in the list and click **Select** to insert the value into the field.

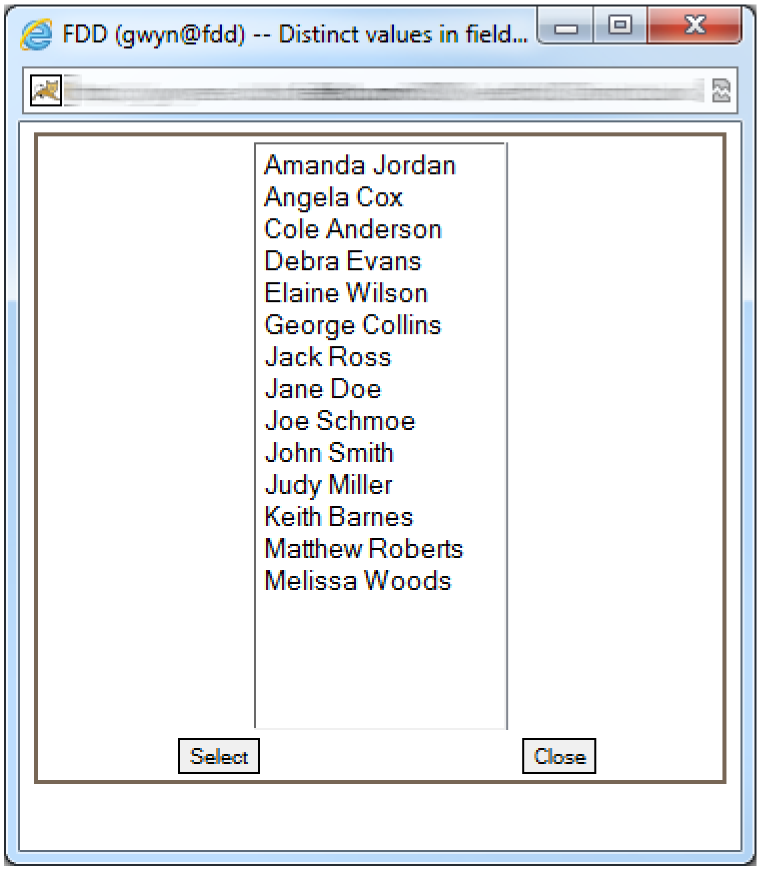


- Select from a list of distinct values that already exist for that file cabinet field by clicking the field name. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

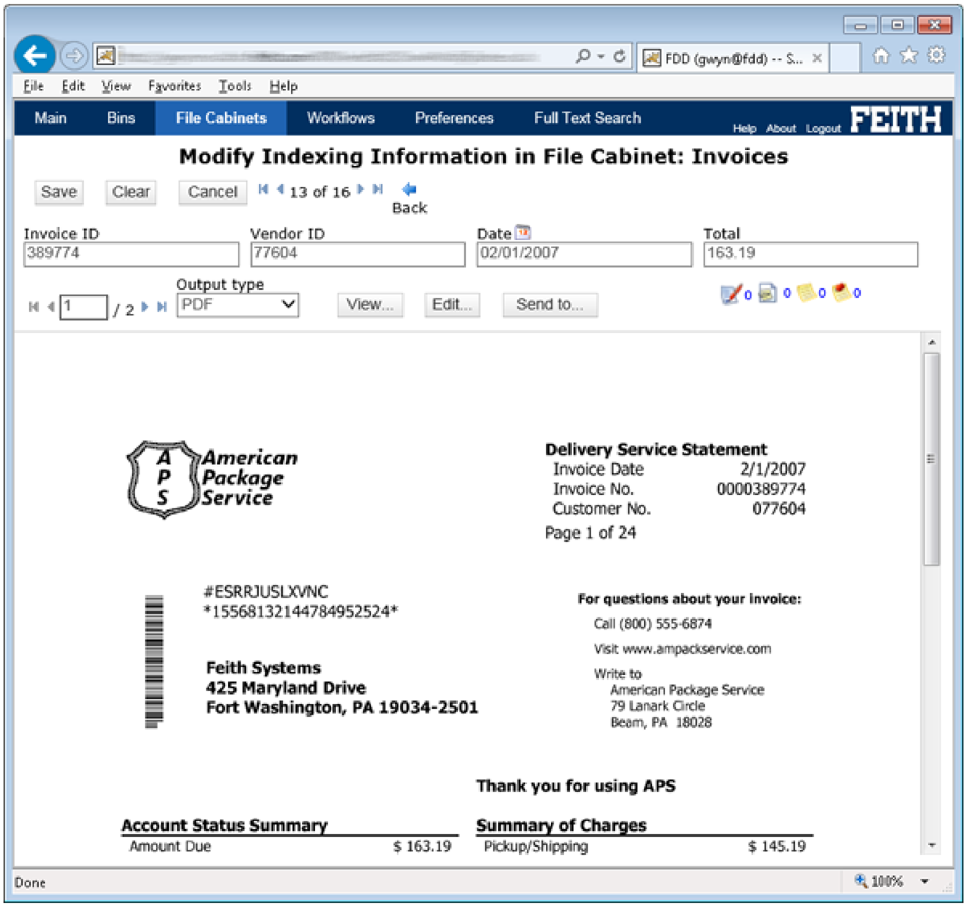
  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



- Note that some index fields may be read-only. You are prevented from entering data into read-only fields.
- If entering multiple values into a list field, enter each value on a separate line using the **ENTER** key.

- Click **Clear** to clear index fields.



5. Click **Save**. Your changes to the index values are saved.

   You may click **Back** to return to the document list.

Note: You can also modify index values when viewing a document by clicking **Modify**.

Route Document

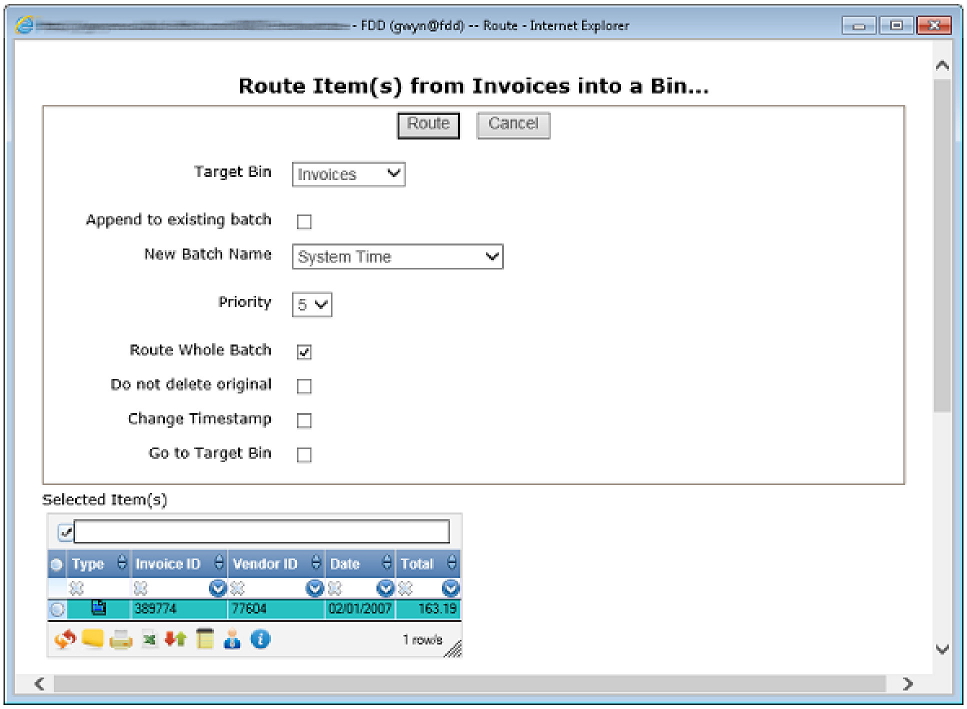
Route a batch or document to move or copy the pages to a bin. Routing is similar to cutting (or copying) and pasting.

To route a batch or document:

1. Search for the batch or document that contain the pages that you want to route.
2. Select the desired batch/document by clicking **Select Row** . You may select multiple batches/documents to route.
3. Right-click the batch/document and select **Route**. The **Route Item(s)** window opens.
4. Choose the desired **Target Bin** where you want the pages to go.
5. Select the desired route options:
   - **Append to existing batch:** Append the pages to an existing batch, instead of creating a separate, new batch. Choose the **Batch Name** of the batch to which you want to append the pages.

     Note: This option is not available when routing multiple batches/documents. You must create new batches in that case.
   - **New Batch Name:** When creating a new, separate batch, choose the **New Batch Name**. You can set the name to be the **System Time** of when the batch was routed or one of the file cabinet index field values.
   - **Priority:** Optionally specify a **Priority**. Batch priority is on a scale of **1** to **9**, with **1** being the highest priority.
   - **Route Whole Batch:** Turn this option on to route all pages. Turn this option off to route only some of the pages and enter the page range that needs to be moved in **From Page...** and **To Page...**.

     Note: This option is not available when routing multiple batches/documents. You must route the whole batches/documents in that case.
   - **Do not delete original:** Turn this option on to keep a copy of the batch/document in its current bin/file cabinet.
   - **Change Timestamp:** Turn this option on to change the batch timestamp. Turn this option off to leave the current batch timestamp.
   - **Go to Target Bin:** Turn this option on to go to the **Target Bin** after routing. Leave this option off to stay at the document list in the file cabinet.



6. Click **Route**. The pages are routed to the bin.

Note: You can also route when viewing a batch or document by clicking **Route** .

Leaps

A leap retrieves documents or information related to the selected document.

There are a few different kinds of leaps:

- **File Cabinet leap:** Searches a file cabinet for related documents.
- **SQL leap:** Performs a SQL (Structured Query Language) query. The query can include file cabinet field values.
- **URL leap:** Opens a browser window and goes to a URL. The URL can include file cabinet field values.

Leaps are configured by the FDD Administrator in Feith Control Panel (see Feith Control Panel User Guide for more information).

To perform a leap:

1. Find a document in a file cabinet or workflow task:
    - Search for a document in a file cabinet and select it by clicking **Select Row** and then right-click and select the desired leap. See Search for Documents for more information.
    - Retrieve a workflow document in a task and select a leap from the **Leaps** list. See View Workflow Document in Task for more information.
2. The leap results vary depending on the leap type:
    - **File Cabinet leap:** The **File Cabinet Leap** window opens and displays related documents. You may click a related document to view it.
    - **SQL leap:** The **Query Results for SQL Leap** window opens and displays the results of the SQL query.
    - **URL leap:** The URL is opened in a new browser window.

Note: For a document in a file cabinet, you may also leap when viewing the document by selecting a leap from the **Leaps** list.

Delete Pages and Documents

Delete Page

To delete a page from a document:

1. View the document or batch containing the page you want to delete.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page that you want to delete.
4. Under **Edit** click **Delete** . You are prompted to confirm the delete.
5. Click **OK** to proceed with the delete. The page is deleted.

Note when the last page is deleted that a 0-page document is retained as an "empty" document.

Delete Document

To delete one or more documents:

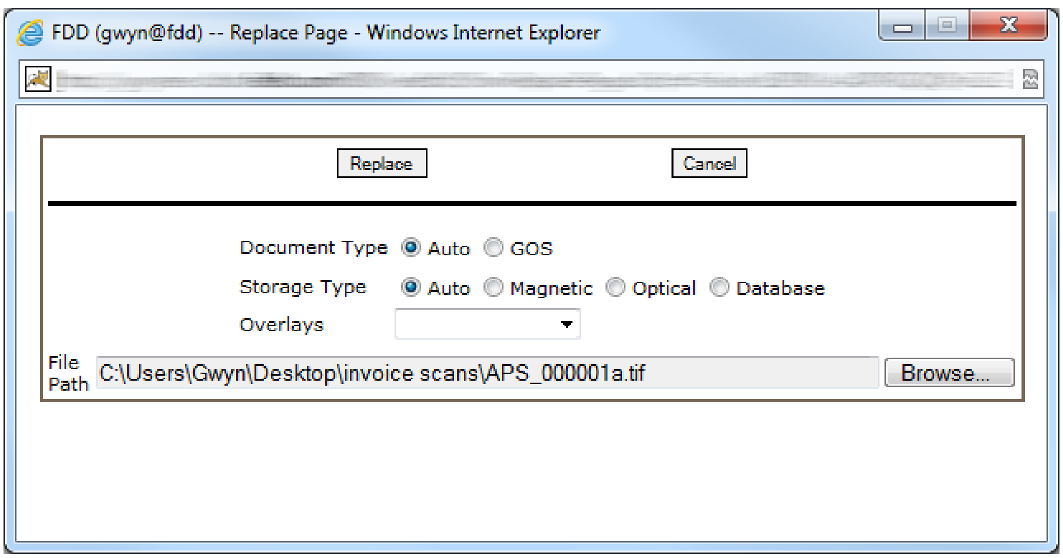
1. Search a file cabinet for the document(s) you want to delete. The document search results display.
2. Select the desired document by clicking **Select Row** . You may select multiple documents to delete if desired.
3. Right-click and select **Delete**. You are prompted to confirm the delete.
4. Click **OK** to proceed with the delete. The selected document(s) is deleted.

Replace Page

Replace a page in WebFDD with a file from your local machine.

To replace a page:

1. View the document or batch containing the page you want to replace.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page that you want to replace.
4. Under **Edit** click **Replace**. The **Replace Page** window opens.
5. Select the desired import options:
    - **Document Type:** Choose the **Document Type**. Leave the **Auto** option set to have the type detected automatically, or specify the type as **GOS** (Generalized Object Storage). See View General Objects for more information on GOS pages.
    - **Storage Type:** Choose the **Storage Type**, specifying what type of storage to use depending on the setup of your system. It is recommended to use the default **Auto**.
    - **Overlays:** Optionally choose one of the **Overlays** to apply to the pages. See View Overlay for more information on overlays.
6. Click **Browse** to browse to the file you want to use to replace the page.



7. Click **Replace**. The page is replaced with the selected file.

Folders

Folders may be used to organize related documents in one location. Folders reside in file cabinets, similar to documents, but can contain documents from across file cabinets. Note that a document in a folder still exists in its original location, in other words the folder "references" the document.

Like documents, folders are assigned index values. The index values identify the folder and allow for future retrieval.

To create a folder:

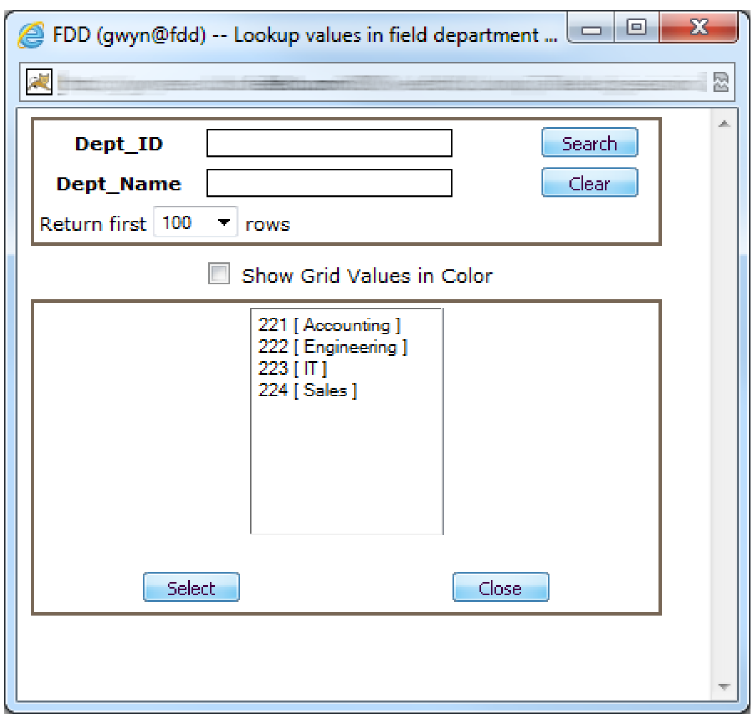
1. Select the file cabinet where you want to add the folder. The **Search in File Cabinet** screen displays.
2. Click **Folder** . The **Add Folder to File Cabinet** screen displays.
3. Enter the index values for the folder. Index values are key pieces of information for identifying and finding the folder. There are various options for entering index values:
    - Type into the fields.
    - Use the **TAB** key to move from one field to the next.
    - If a field has a binoculars icon , click it to choose from a list of suggested values in the **Lookup values** dialog. Note that if the binoculars are red , the value *must* be chosen from the list of suggested values.

    To choose a value from a lookup table:

    In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

    By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

    Select the desired value in the list and click **Select** to insert the value into the field.

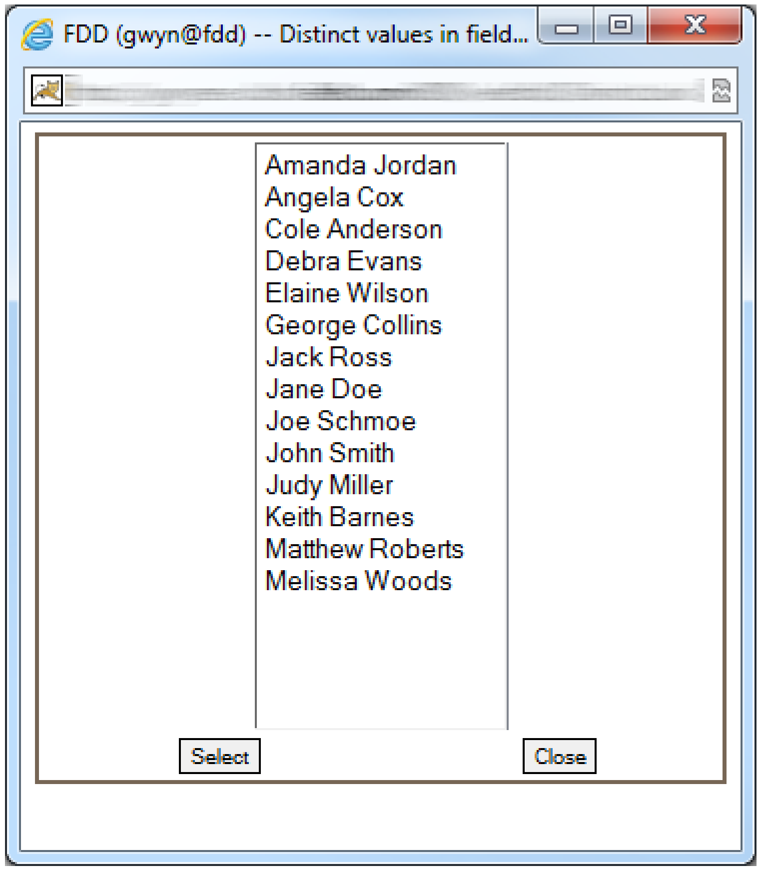


- Select from a list of distinct values that already exist for that file cabinet field by clicking the field name. Note that a file cabinet with many documents may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



- Note that some index fields may be read-only. You are prevented from entering data into read-only fields.
- Click **Clear** to clear index fields or click **Default** to reset the index fields back to their default values.

4. Optionally specify document-level permissions by choosing a permission template from the **Access** list.

   It is recommended to use the default **Public Access**. Restricting access to documents using document-level permissions is not normally needed. Document permission templates are created in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

5. Click **Add**. The folder is created.

Note: You may also add a folder when viewing the document list resulting from a file cabinet search by right-clicking in the grid and selected **Add Folder**.

Add Documents to Folders

To add an existing document to a folder.

1. Search for the document you want to put in the folder. The document may reside in any file cabinet.
2. Select the desired batch/document by clicking **Select Row** .
3. Right-click the batch/document and select **Copy**. The document is copied to the WebFDD clipboard.

   Note: Documents are only copied to folders (not "cut") since a document in a folder still exists in its original location, in other words the folder "references" the document.
4. If your preferences are set to append to the WebFDD clipboard (instead of overwrite), you may search for and copy additional documents to the WebFDD clipboard. See Change Preferences for more information on clipboard preferences.
5. Search for the folder in which you want to put the document.
6. Left-click the folder to view it. The folder displays.
7. Click **Paste** . The document(s) is put into the folder. Note that a document on a folder still exists in its original location, in other words the folder "references" the document.

   If desired, you may clear the WebFDD clipboard by clicking **Clear** .

Manage and Delete Folders

To view the contents of a folder:

1. Search for the desired folder. The search results display.
2. Left-click the folder. The folder displays with the documents in contains. The documents are listed by their index values and grouped by file cabinet.

   You may left-click a document to view it.

To remove a document from a folder:

1. View a folder. The folder displays with its documents.
2. Select the desired document(s) by clicking **Select Row** .
3. Right-click and select **Remove From Folder**. The document is removed from the folder.

To delete a folder:

1. Search a file cabinet for the folder(s) you want to delete. The search results display.
2. Select the desired folder by clicking **Select Row** . You may select multiple folders to delete if desired.
3. Right-click and select **Delete**. You are prompted to confirm the delete.
4. Click **OK** to proceed with the delete. The selected folder(s) is deleted.

Notes:

- When a document is deleted from its file cabinet, it is also removed from any folder it was added to.
- Removing a document from a folder does not delete the document from the FDD system. The document still resides in its file cabinet.

Dynamic Folders

Dynamic Folders may be used to automatically organize related documents in one location. Dynamic folders reside in file cabinets, similar to documents, and gather documents from the same file cabinet or another file cabinet. Note that a document in a dynamic folder still exists in its original location, in other words the dynamic folder "references" the document. Dynamic folders are created in FDD Client.

Like documents, dynamic folders are assigned index values. One or more of these index values are used to gather the documents the dynamic folder contains. Which index values the dynamic folder matches on is determined by a file cabinet leap configured as the Dynamic Folder Leap on the file cabinet in Feith Control Panel (see Feith Control Panel User Guide for more information). The content of the dynamic folder changes on the fly as the results of the Dynamic Folder Leap change over time. Therefore, it is not necessary to manually add or remove documents from the dynamic folder.

View Contents of Dynamic Folder

To view the contents of a dynamic folder:

1. Search for the dynamic folder. See Search for Documents for more information.
2. Click View. The set of documents in the dynamic folder display.

   Navigate through the pages in the documents using the controls provided by Adobe Reader in the browser.

Delete Dynamic Folder

To delete a dynamic folder:

1. Search for the dynamic folder. See Search for Documents for more information.
2. Select the desired dynamic folder by clicking **Select Row** . You may select multiple dynamic folders to delete if desired.
3. Right-click and select **Delete**. You are prompted to confirm the delete.
4. Click **OK** to proceed with the delete. The selected dynamic folder(s) is deleted.

Notes:

- When a document is deleted from its file cabinet, it is also no longer shown in any dynamic folder it was gathered in previously.
- When a document no longer appears in the dynamic folder, it may have been deleted or its index values may have changed causing it to no longer be returned in the results of the Dynamic Folder Leap set on the file cabinet in Feith Control Panel (see Feith Control Panel User Guide for more information).

Collect Documents

Collect a document into a collection folder in the Collections Center file cabinet. A collection is a set of documents from any file cabinet brought together for your desired purpose, such as e-discovery or exporting them for someone. Note that a document in a collection still exists in its original location, in other words the collection "references" the document.

Note: If collection features do not appear, you either do not have sufficient permission or WebFDD has not been configured for collections. Administrators, refer to **WebFDD Admin Guide** on how to configure WebFDD for collections.

To collect a document:

1. Search for a document. The search results display. See Search for Documents for more information.
2. Select the desired document by clicking **Select Row** . You may select multiple documents to collect.

   Note: If you select a folder, the documents in the folder will be added to the collection (not the folder itself).
3. Right-click the document and select **Collect**. The **Add Selected Items to Collection** window opens.
4. Choose whether you want to put the document(s) in an existing collection or create a new collection:
   - **Add to existing document collection:** Add the document(s) to an existing collection. Choose the **Collection Name** of the collection to which you want to add the documents.
   - **Add to new document collection:** Create a new collection and add the document(s) to it.
5. Click **OK**. The results vary depending on your collection selection:
   - If you chose to add the documents to an existing collection, the documents are added.
   - If you chose to create a new collection, the **Add New Document Collection** screen displays. Create the collection by entering the index values and choosing a freeze **Reason** for the new collection and clicking **Add**. The collection is created and the documents are added to it.

     Note: A freeze **Reason** is the reason for the documents being collected (e.g. for a court case) and "frozen". Frozen documents are on "legal hold" and cannot be deleted. A freeze state can be removed at the appropriate time using the RMA iQ Workplace. Freeze states are created in Feith Control Panel. See **RMA iQ Workplace User Guide** and **Feith Control Panel User Guide** for more information.

View Contents of Collection

To view the contents of a collection:

1. Go to the **Collections Center** file cabinet and search for the desired collection. The search results display. See Search for Documents for more information.
2. View the collection. The collection with all the documents it contains displays.

   You may left-click a document to view it.

Export Collection

Export a collection to given to someone. Note that WebFDD must be configured with Feith FPX to export a collection (see Optional Components for more information on FPX).

To export a collection:

1. Go to the **Collections Center** file cabinet and search for the desired collection. The search results display. See Search for Documents for more information.
2. View the collection. The collection displays.
3. Click **Build** . A prompt displays informing you that building of the collection export file has begun.
4. Click **Reload** as needed to monitor the building of the collection export file. You may click **View Build Log** to view the progress.
5. Continue to click **Reload** until **Build** changes to **Download** .

   Note: If the button does not change an error may have occurred during the export. Check the export log by clicking **View Build Log**. An error could be caused by FPX not being configured correctly.

6. Click **Download** . You are prompted to download the collection export ZIP file.
7. Download the ZIP file. The ZIP file contains the pages from the documents in the collection.

   Note: If the ZIP file does not contain the expected documents, check with your FDD Administrator to make sure FPX is configured correctly

Manage and Delete Collections

To remove a document from a collection:

1. View a collection. The collection displays with its documents.
2. Select the desired document(s) by clicking **Select Row** .
3. Right-click and select **Remove From Folder**. The document is removed from the collection folder.

To delete a collection:

1. Search a file cabinet for the collection(s) you want to delete. The search results display.

   Note: A collection with a freeze **Reason** cannot be deleted until the freeze state is removed. See **RMA iQ Workplace User Guide** for more information.

2. Select the desired collection by clicking **Select Row** . You may select multiple collections to delete if desired.
3. Right-click and select **Delete**. You are prompted to confirm the delete.
4. Click **OK** to proceed with the delete. The selected collection(s) is deleted.

Notes:

- When a document is deleted from its file cabinet, it is also removed from any collection it was added to.
- Removing a document from a collection does not delete the document from the FDD system. The document still resides in its file cabinet.

Overlays

An overlay is an image that is displayed "over" a page. An overlay is typically the image of a form, such as an invoice or purchase order, that is then displayed over a text page, in order to give the impression of viewing a completed form.

Overlays are typically applied to a page automatically (e.g. by COLD), but can be applied manually when a page is imported (see Introduction to Importing for more information).

View Overlay

To view an overlay on a page:

1. View a document. See View Documents for more information.
2. Under **View** click **Overlay** . The overlay is displayed on the page.

   You may click **Overlay** again to hide the overlay.

You may have overlays display automatically by turning on **Show Overlay by Default** in your **Preferences**. See Change Preferences for more information.

Create Overlay

To create an overlay:

1. Import the overlay into WebFDD. See Introduction to Importing for more information.
2. Index the overlay into the **Overlays** file cabinet, entering values in the following fields:
   - **overlay_name:** The name of the overlay.
   - **overlay_id:** The unique id number for the overlay.
   - **overlay_type:** The overlay type. Enter "Image".
3. Optionally enter values in the following fields to affect the display of the text on the pages to which the overlay is applied:
   - **font_name:** The font of the text on the page to which the overlay is applied.
   - **font_size:** The font size of the text on the page to which the overlay is applied (e.g. 12).
   - **cpi:** The number of characters to display per inch (e.g. 10).
   - **lpi:** The number of lines to display per inch (e.g. 6).
   - **xtextoffset:** The amount of horizontal offset (e.g. 0).
   - **ytextoffset:** The amount of vertical offset (e.g. 0).
   - **paper_width:** The page width in inches (e.g. 8.5).
   - **paper_height:** The page height in inches (e.g. 11).
4. Optionally enter the **color** for the overlay display (e.g. 0).

Document Versioning

What is Versioning?

Versioning allows a user to create multiple versions of the same document. By creating a different version, you can modify a document while retaining a version of it in its original state.

A versioned document is not another document, it is simply a version of the same document. A versioned document can only exist in file cabinets, not bins or workflows.

Modifications made to a new version are applied to the document as a whole. You cannot edit an individual page within the document. You can add, delete, and re-order pages.

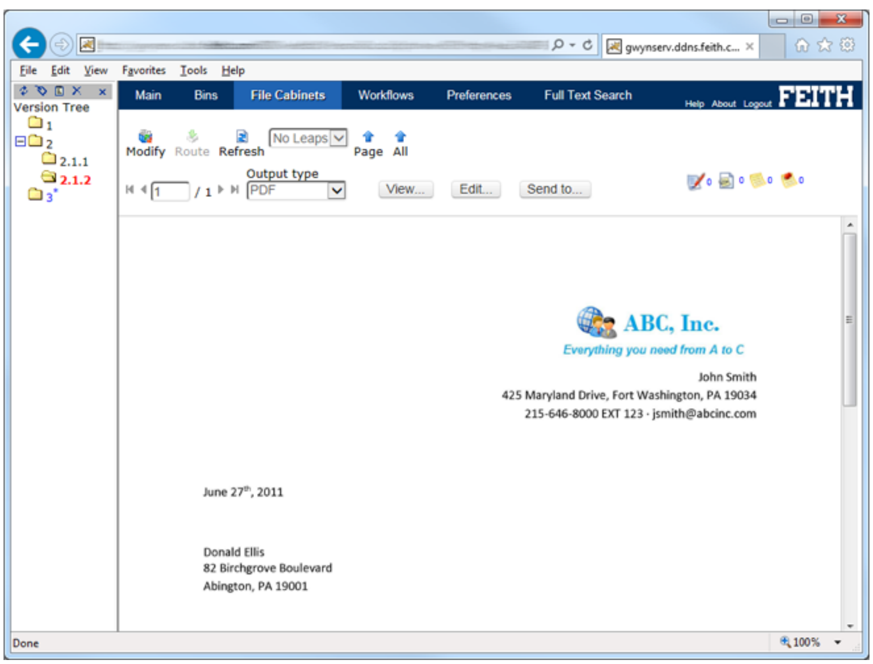
When a versioned document is checked in no one may add, delete, or re-order any pages of that document. However, a versioned document can be deleted altogether.

You may still modify page notes. (Remember that a note is associated with an individual page; if you create or modify a note this is reflected in all versions.)

How Does Versioning Work?

When a document is "checked in" it is automatically assigned version 1. No one can add, delete, or re-order any of its pages. To modify this document you must check out a new version. This will create another document called version 2. WebFDD then copies all of version 1's pages into version 2. You can then modify version 2 and then "check in" the modified version. When checking in you may enter comments explaining what has changed and the reason for the change.

The first version number of a document is version 1. The next version number is 2, then 3, and so on. If version 2 is checked out, and version 3 exists, the new version will be added as a branch of version 2 called 2.1.1. When version 2.1.1 is checked out the next version will be 2.1.2, then 2.1.3, and so on. If version 2 is checked out again and version 3 exists and version 2.1.1 exists, the new version will be 2.2.1. When 2.2.1 is checked-out the next version will be 2.2.2 then 2.2.3 and so on. WebFDD will automatically calculate the version numbers and assign them properly.



When displaying the version history of a document, you have the option to label a version with some meaningful information regarding that particular version.

Version a Document

Once you have started a versioned document, you can check it out, make changes, check it in, and manage it as needed.

The **Version Tree** is used to manage versions. Open the **Version Tree** by viewing a document and clicking **Version** .

You may click **Refresh** to refresh the **Version Tree**. When you want to close the **Version Tree**, click **Close** .

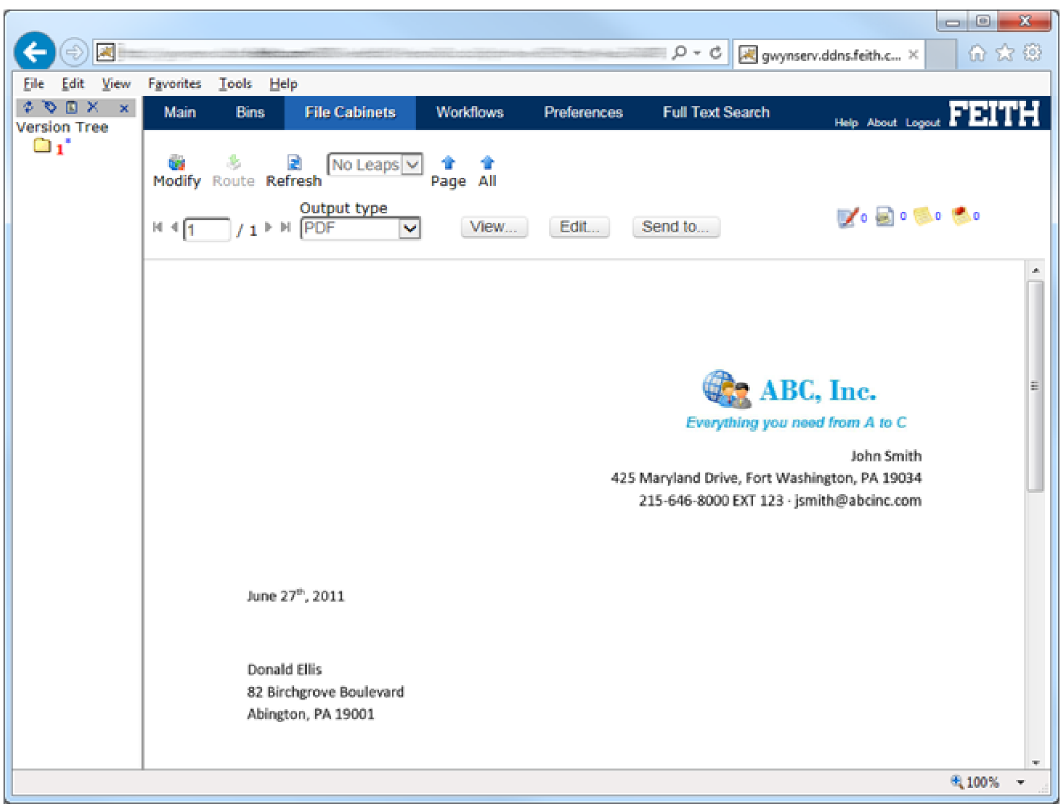
Each version has an icon that indicates whether it is checked in or out and whether it is the version currently being selected and viewed:

- Checked in and not selected.
- Checked in and being selected and viewed.
- Checked out and not selected.
- Checked out and being selected and viewed.

Note: The asterisk (*) next to the version number denotes the highest checked-in version (the version that is shown to those who view the document).

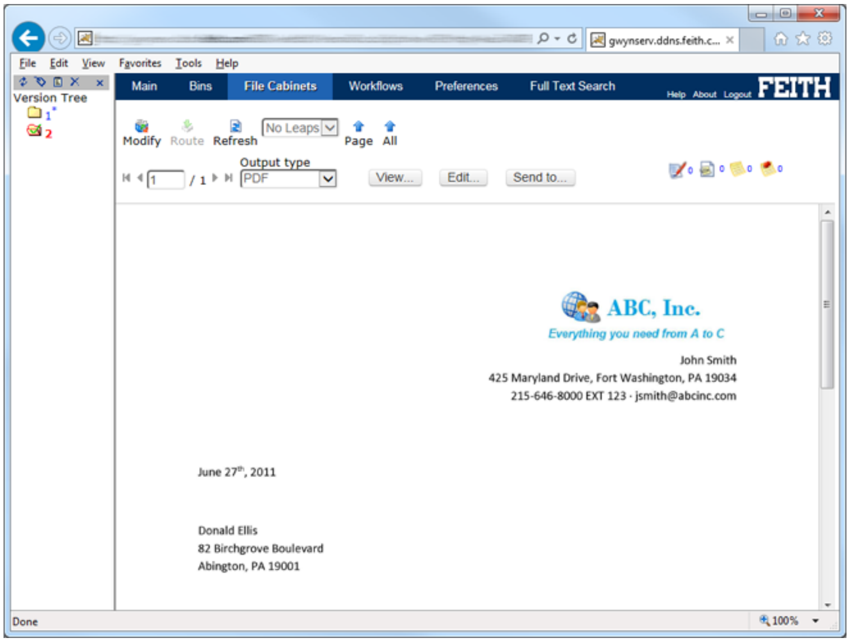
To start a versioned document:

1. View a document.
2. Click **Version** . You receive a prompt asking if you want to make this a versioned document.
3. Click **OK** to proceed with versioning the document. The **Version Tree** opens on the left and the document is checked in as version **1**.



To check out a version:

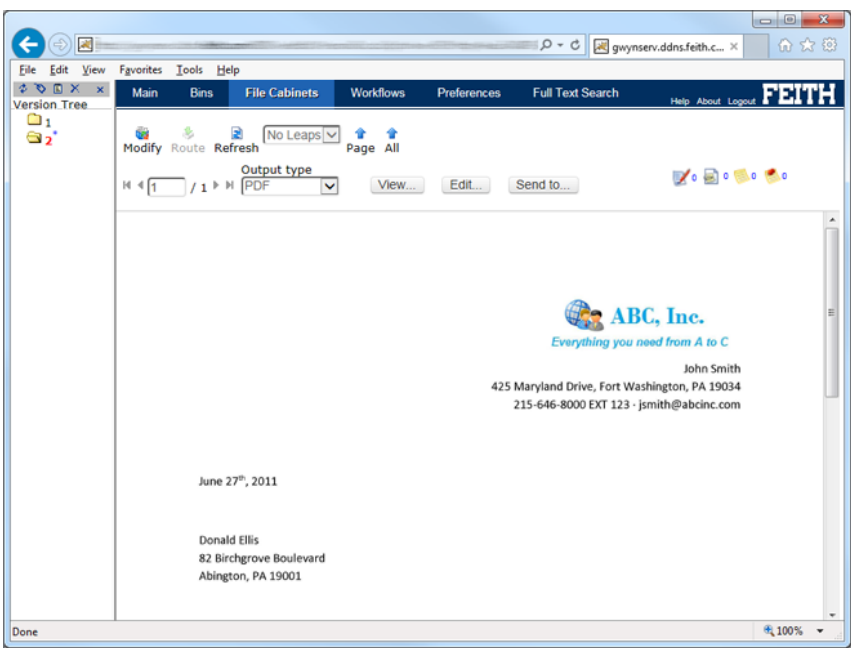
1. In the **Version Tree** click the folder icon of a checked in version. You are prompted to confirm checking out the version.
2. Click **OK** to proceed with the check out. A new version is created and checked out.



3. Make changes to the checked out version as desired.

To check in a version:

1. After checking out a version and making changes as desired, in the **Version Tree** click the folder icon of the checked out version. You are prompted to confirm checking in the version.
2. Click **OK** to proceed with the check in. The version is checked in.



To view a version:

- In the **Version Tree**, click the number of a version to select and view it. The version is displayed in the document window and the version number is highlighted red in the **Version Tree**.

To uncheck (delete) a version:

1. In the **Version Tree**, click the number of the version to select it. The version is displayed in the document window and the version number is highlighted red in the **Version Tree**.
2. Click **Uncheck** . You are prompted to confirm unchecking of the selected version.
3. Click **OK** to proceed with unchecking the version. The version is unchecked (deleted) and the previous version is selected and displayed.

   Notes:

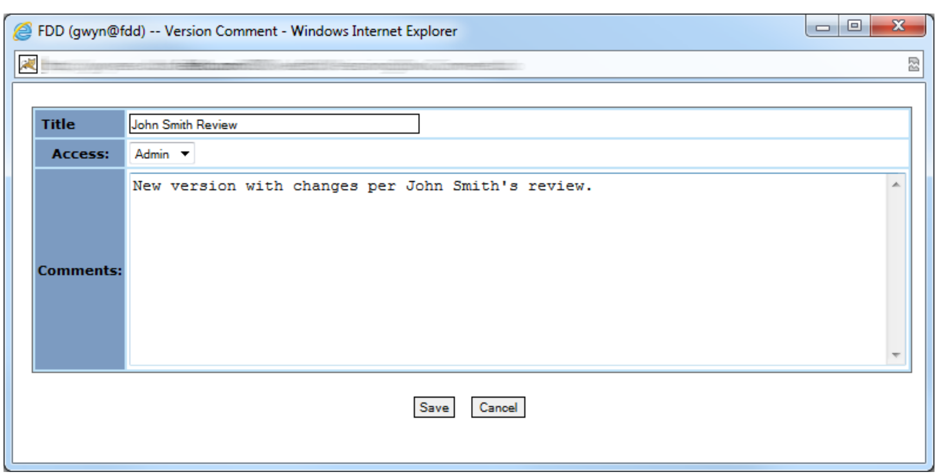
   - If you uncheck a version in the middle of the version tree, its number will still display but in gray with a line through it to indicate it has been unchecked.
   - If all versions are unchecked, the document is no longer a versioned document.

To add a version label:

1. In the **Version Tree**, click the number of the version to select it. The version is displayed in the document window and the version number is highlighted red in the **Version Tree**.
2. Click **Label** . The **Set Version Label** window opens.
3. Enter a **Label**.
4. Click **Save**. The label is saved and displays next to the version number in the **Version Tree**.

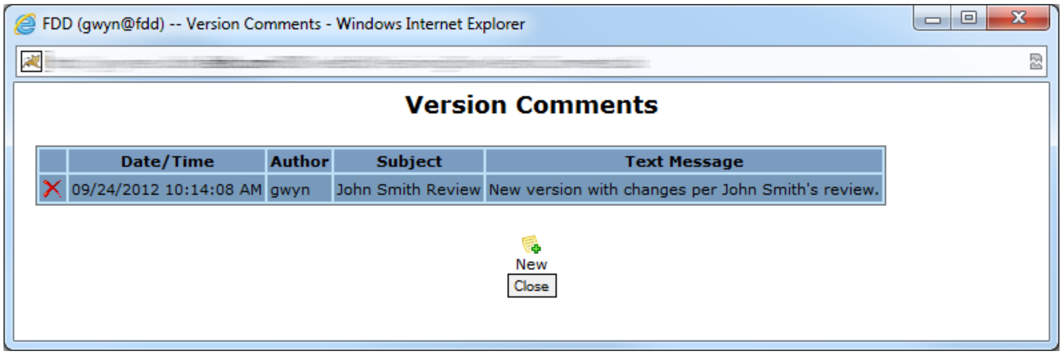
To add a version comment:

1. In the **Version Tree**, click the number of the version to select it. The version is displayed in the document window and the version number is highlighted red in the **Version Tree**.
2. Click **Version Comments** . The **Version Comments** window opens.
3. Click **New** . The **Version Comment** screen displays.
4. Enter the comment's **Title**.
5. Specify who can **Access** the comment.
6. Enter the **Comments**.



7. Click **Save**. The comment is saved.

8. Click **Cancel** to return to the **Version Comments** screen. Your comment is in the list.



9. Click **Close** to return to the document view window.

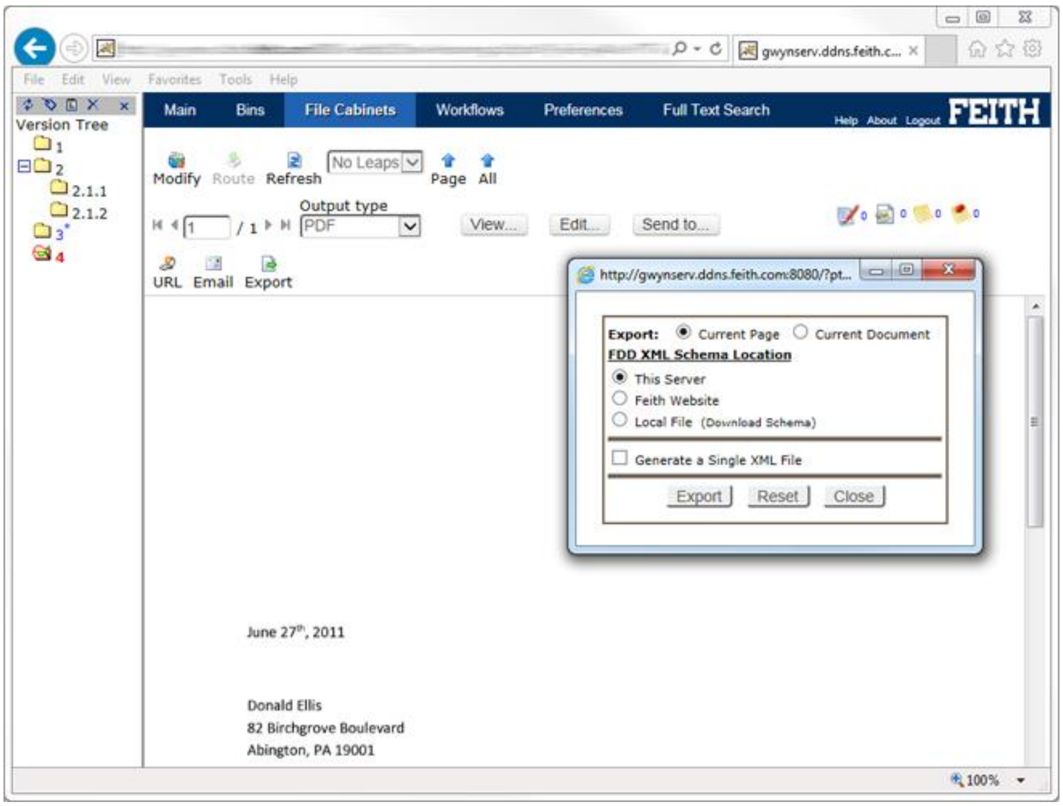
Version and Edit General Objects

General Objects (GOS) are Windows-type electronic files such as word-processing documents or spreadsheets.

To version and edit a GOS document, you will need to check out a version and then export the file in order to edit it in the appropriate application (e.g. edit a DOC file in Microsoft Word). Once the file is edited, you bring it back into WebFDD using the "replace" feature and check in the version.

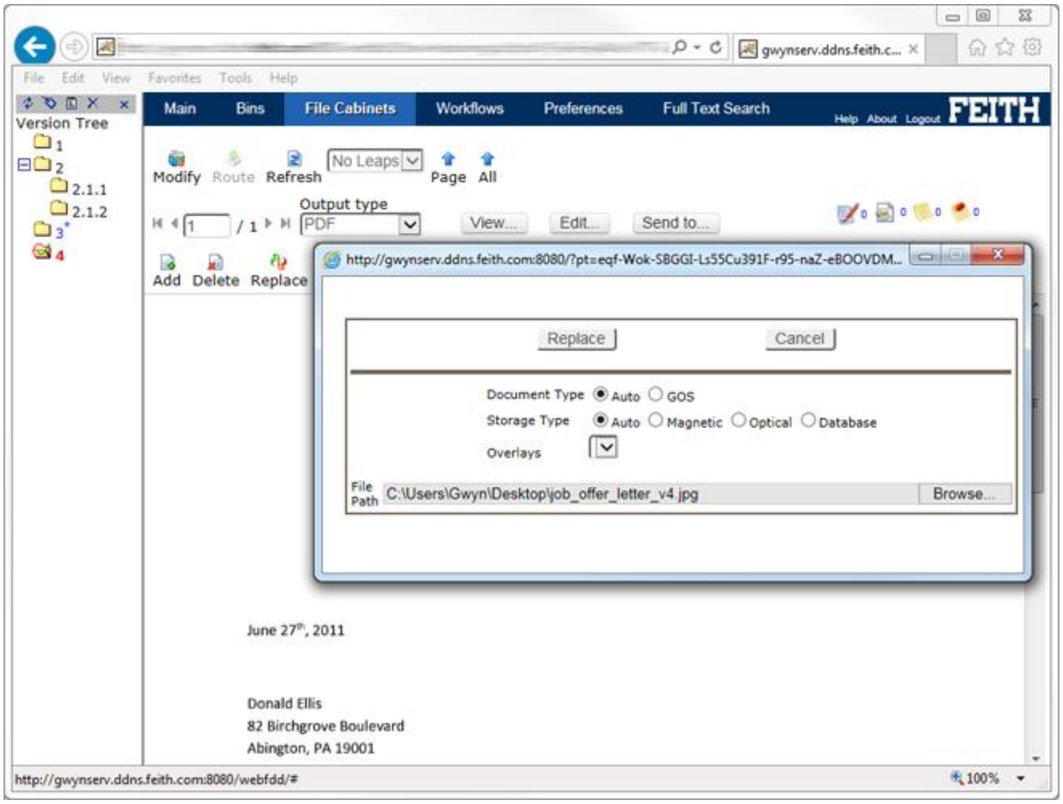
To version and edit a GOS document:

1. Version the GOS document, if it is not already versioned, by clicking **Version**. See Version a Document for more information.
2. Check out a new version by clicking its folder icon in the **Version Tree**. See Version a Document for more information.
3. Export the GOS document by clicking **Export** under **Send to**. See Export Page for more information
4. Make sure the **Export: Current Page** and **FDD XML Schema Location: This Server** options are selected.



5. Click **Export**. You are prompted to download the export file.
6. Download the export file.
7. Browse to the export file.
8. The export file is a ZIP. Extract the contents of the ZIP file.
9. Open the exported GOS file in its associated application and edit it as needed.
10. Return to WebFDD and view the checked out version, if it is not already being viewed.
11. Replace the old page with the edited file by clicking **Replace** under **Edit**. See Replace Page for more information.

12. Select the edited GOS file.



13. Click **Replace**. The old page is replaced with the edited GOS file.
14. Check in the version by clicking its folder in the **Version Tree**. The new version of the edited GOS document is checked in. See Version a Document for more information.

Page and Document Notes

Page Notes

Page Notes Introduction

A page note is an additional piece of information, such as comments or highlights, on an individual page in a document or batch. Note that page notes do not alter the original page in any way.

The types of page notes are as follows:

Text Notes	Add comments for a page.
Graphic Notes	Draw or write on the page image.
Redaction Notes	Redact a section of the page with sensitive information.
Highlight Notes	Highlight a section of the page.

Text Notes

Add comments for a page using text notes.

To add a text note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to add the note.
4. Click **Pages notes** . The page note list displays.
5. Click **Add Page Note**. The **Add Text Note** window opens.
6. Enter the note's **Subject**.
7. Specify who will have **Access** to the note.
8. Optionally enter an expiration date for the note in the **Expires** field (e.g. 9/19/2012).
9. Optionally check **Auto Display** to have the note display automatically when viewing a document in FDD Client.

   Note: This setting only applies when viewing documents in the FDD Client.
10. Enter the desired text in the **Note** field.
11. Click **Save**. The note is saved and set on the page.

See Modify Page Notes and Delete Page Notes for more information on modifying and deleting page notes.

Graphic Notes

Draw or write on the page image using graphic notes.

To add a graphic note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to add the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Click **New Graphic Note** . The graphic note toolbar displays on the left.
6. Draw or write on the page as desired. The available tools are:
    - **Paintbrush:** Click-and-draw to draw.
    - **Eraser:** Click-and-draw to draw.
    - **Framed Rectangle:** Click-and-draw to draw.
    - **Filled Rectangle:** Click-and-draw to draw.
    - **Line:** Click-and-draw to draw.
    - **Arrow:** Click-and-draw to draw.
    - **Dotted Line:** Click-and-draw to draw.
    - **Text:** Click and type to write.
    - **Font:** Choose font and font size.
    - **Pen Size:** Choose pen size.
7. Click **Save Note** . The **Save Note** window opens.
8. Enter the note's **Subject**.
9. Specify who will have **Access** to the note.
10. Optionally enter an expiration date for the note in the **Expires** field (e.g. 9/19/2012).
11. Optionally check **Auto Display** to have the note display automatically when viewing a document in FDD Client.

    Note: This setting only applies when viewing documents in the FDD Client.
12. Click **Save**. The note is saved and set on the page.

See Modify Page Notes and Delete Page Notes for more information on modifying and deleting page notes.

Redaction Notes

Redact a section of the page with sensitive information using redaction notes. The redaction obscures ("black out" or "white out") a section of the page in order to hide confidential information.

Note: The **Black out** or **White out** redaction setting applies when viewing redaction notes in FDD Client. When viewed in WebFDD, if you have permission to the redaction, the redaction note displays as a highlight.

To add a redaction note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to add the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Click **New Redaction Note** . The highlight note toolbar displays on the left.
6. Redact one or more sections on the page as desired. The available tools are:
    - **Select a Region:** Select a region. With a region selected you may:
        - Move a region using click-and-drag.
        - Resize or reshape a region using click-and-drag on one of the handles.
        - Resize or reshape a region using click-and-drag on one of the handles.
    - **Rectangular Redaction Region:** Click-and-drag to draw.
    - **Polygonal Redaction Region:** Click to set a start point and continue to click to set subsequent points. Close the polygon by clicking on the start point again.
    - **Redaction Region Properties:** Choose redaction color and appearance. Optionally choose a redaction reason code or enter a comment. See Redaction Region Properties for more information.
    - **Delete Selected Region:** Delete the selected region.
7. Click **Save Note** . The **Save Note** window opens.
8. Enter the note's **Subject**.
9. Specify who will have **Access** to the note.
10. Click **Save**. The note is saved and set on the page.

Redaction Region Properties

Choose the redaction region properties:

- **Redact By:** Choose to redact by **Black out** or **White out**.

  Note: The **Black out** or **White out** redaction setting applies when viewing redaction notes in FDD Client. When viewed in WebFDD, if you have permission to the redaction, the redaction note displays as a highlight.

- **Appearance:** Change the redaction note's **See Through Color**, **Text Color**, and **Font**. (The **Text Color** and **Font** apply to any reason codes, if set.)
- **Reasons:** Optionally choose a redaction reason code indicating the reason for the redaction.
- **Comments:** Optionally enter a comment for the redaction.

See Modify Page Notes and Delete Page Notes for more information on modifying and deleting page notes.

Note: If you are full text indexing pages with redaction notes and you have FDD users who do *not* have permission to see below the redaction notes but they can full text search for or look at those pages, then we recommend a separate "reading room" FDD system for those FDD users.

Highlight Notes

Highlight a section of the page using highlight notes.

To add a highlight note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to add the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Click **New Highlight Note** . The highlight note toolbar displays on the left.
6. Highlight one or more sections on the page as desired. The available tools are:
    - **Select a Region:** Select a region. With a region selected you may:
        - Move a region using click-and-drag.
        - Resize or reshape a region using click-and-drag on one of the handles.
        - Delete a region by hitting the **DELETE** key.
    - **Rectangular Highlight Region:** Click-and-drag to draw.
    - **Polygonal Highlight Region:** Click to set a start point and continue to click to set subsequent points. Close the polygon by clicking on the start point again.
    - **Highlight Properties:** Choose highlight color.
    - **Delete Selected Region:** Delete the selected region.
7. Click **Save Note** . The **Save Note** window opens.
8. Enter the note's **Subject**.
9. Specify who will have **Access** to the note.
10. Optionally check **Auto Display** to have the note display automatically when viewing a document in FDD Client.

    Note: This setting only applies when viewing documents in the FDD Client.
11. Click **Save**. The note is saved and set on the page.

See Modify Page Notes and Delete Page Notes for more information on modifying and deleting page notes.

Modify Page Notes

To modify a text page note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to modify the note.
4. Click **Pages notes for this page** . The page note list displays.
5. Click a note to select it. The **Text Note** window opens.
6. Click **Modify**. The **Modify Text Note** screen displays.
7. Modify the note as needed.
8. Click **Save**. The note is saved.

To modify a graphic, redaction, or highlight page note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to modify the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Select the note you want to modify in the **Notes** list.
6. Click **Edit Note** . The note toolbar displays on the left.
7. Modify the note as needed.
8. Click **Save Note** . The **Save Note** window opens.
9. Modify the note properties as needed.
10. Click **Save**. The note is saved.

Delete Page Notes

To delete a text page note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to delete the note.
4. Click **Pages notes for this page**. The page note list displays.
5. Click a note to select it. The **Text Note** window opens.
6. Click **Delete**. You are prompted to confirm the deletion.
7. Click **OK** to proceed with the delete. The text page note is deleted.

To delete a graphic, redaction, or highlight page note:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to delete the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Select the note you want to delete in the **Notes** list.
6. Click **Delete Note**. You are prompted to confirm the deletion.
7. Click **Yes** to proceed with the delete. The note is deleted.

Document Notes

Document Notes Introduction

A document note is an additional piece of information, such as comments or signatures, on a batch or document.

The types of document notes are as follows:

Signatures	Sign a document.
Document Notes	Add comments for a document.

Signatures

Sign a document or batch using signatures. A signature note contains information that identifies both the signer and the makeup of the document.

Sign a Document

To sign a document:

1. View a document or batch.
2. Click **Signatures**. The signatures list displays.
3. Click **Add Signatures**. The **Sign Document** window opens.
4. Enter a **Signature Title**.
5. Enter your **Password**.
6. Click **Sign**. The document is signed.

Verify Signature

A valid signature verifies that the document has not been altered since it was signed.

To verify a signature:

1. View a document or batch.
2. Click **Signatures**. The signatures list displays.
3. Click a signature to select it. The **Digital Signatures Menu** window opens.
4. Select the signature you want to verify.
5. Click **Verify Signature**. The **Signature Validation** window opens and tells you whether the signature is valid or not valid.

   If the signature is invalid, the reason for invalidation is stated. A signature is invalidated if:

   - Pages are added to the document.
   - Pages are deleted from the document.
   - Pages are reordered.
   - Any of the personal stamps are modified or deleted.

Delete Signature

A signature can only be deleted by the signer who created the signature note or the "fdd" user.

To delete a signature:

1. View a document or batch.
2. Click **Signatures**. The signatures list displays.
3. Click a signature to select it. The **Digital Signatures Menu** window opens.
4. Select the signature you want to delete.
5. Click **Delete Signature**. The signature is deleted.

Document Notes

Add comments to a document using document notes.

Add Document Note

To add a document note:

1. View a document or batch.
2. Click **Document notes** . The document note list displays.
3. Click **Add Document Note**. The **Add Document Note** window opens.
4. Enter the note's **Subject**.
5. Specify who will have **Access** to the note.
6. Optionally enter an expiration date for the note in the **Expires** field (e.g. 9/19/2012).
7. Enter the desired text in the **Note** field.
8. Click **Save**. The note is saved and set on the document or batch.

Modify Document Note

To modify a document note:

1. View a document or batch.
2. Click **Document notes** . The document note list displays.
3. Click a note to select it. The **Document Note** window opens.
4. Click **Modify**. The **Modify Document Note** screen displays.
5. Modify the note as needed.
6. Click **Save**. The note is saved.

Delete Document Note

To delete a document note:

1. View a document or batch.
2. Click **Document notes** . The document note list displays.
3. Click a note to select it. The **Document Note** window opens.
4. Click **Delete**. You are prompted to confirm the deletion.
5. Click **OK** to proceed with the delete. The text page note is deleted.

View Notes

To view the notes on a batch or document and its pages:

1. View a document or batch.
2. In the upper right of the **View Document** screen is the note control with counts of notes.

   The note control indicates what notes exist on the page and document as follows:

	**Signatures**	Signatures on the document.
	**Document Notes**	Document text notes on the document.
	**Page Notes**	Pages notes on all pages of the document.
	**Page Notes for This Page**	Page notes for the currently-displayed page. **Note:** This button and its count are only available when in **Single** page view mode. See View Modes for more information.

3. Click the desired button - **Signatures**, **Document notes**, **Page notes**, or **Page notes for this page** - in the note control. The note list for the selected note type displays.
4. Click a note to view it. The notes display as follows based on the type:
   - **Signatures** display in the **Digital Signature Menu** window. See Signatures for more information.
   - **Document notes** display in the **Document Note** window. See Document Notes for more information.
   - **Page notes** display in their respective note windows, depending on the type. If you view a note that is not on the current page then you are brought to the page where the note is located. See Page Notes Introduction for more information.
   - **Page notes for this page** display in their respective note windows, depending on the type. Optionally check graphic notes and click **Show Graphic Notes** to view them. If the page has been indexed for full text searching, you may view its UTR note by clicking **UTR Note** (see Full Text Search Overview for more information). See Page Notes Introduction for more information.
5. Click **Close**  to close the current note list and view another.

View Graphic, Highlight, and Redaction Notes in FDD Viewer

To view graphic, highlight, and redaction notes in the FDD Viewer:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page where you want to view the note.
4. Choose **FDD Viewer** as the **Output Type**. The page displays in the FDD Viewer.
5. Select the note you want to view in the **Notes** list. The note displays.

Print Notes

Print notes that are on a document or page.

Print Document and Page Text Notes

To print document and page text notes:

1. View the note. See View Notes for more information.
2. Right-click in the note window and use print option provided by the browser (e.g. in Internet Explorer select **Print**).
3. Choose the desired options and print the note. The note is printed.

Print Graphic, Highlight, and Redaction Notes in FDD Viewer

To print graphic, highlight, and redaction notes in the FDD Viewer:

1. View the note in the **FDD Viewer**. See View Notes for more information.
2. Select the desired note in the **Notes** list. The note displays.
3. Click **Print** .
4. If you receive a prompt to confirm you want the **FDD Viewer** applet to access the printer, click **OK** to continue.
5. Choose the desired options and print the note. The page is printed with the note.

Print, Email, and Export Documents

Print Documents

To print a document or batch:

1. View a document or batch.
2. Use the print option in the application used to display the page(s).

   For example, if you are viewing page(s) rendered as a PDF, us the print option in Adobe Reader.

Depending on whether you want to print an individual page or multiple pages at once, you may switch between the **Single** page view mode and **All** pages view mode. See View Modes for more information.

If viewing a GOS page, us the print option in the application use to display the GOS page. See View General Objects for more information.

Email Pages and Documents

Email pages and documents or batches, as well as multiple documents or batches at once.

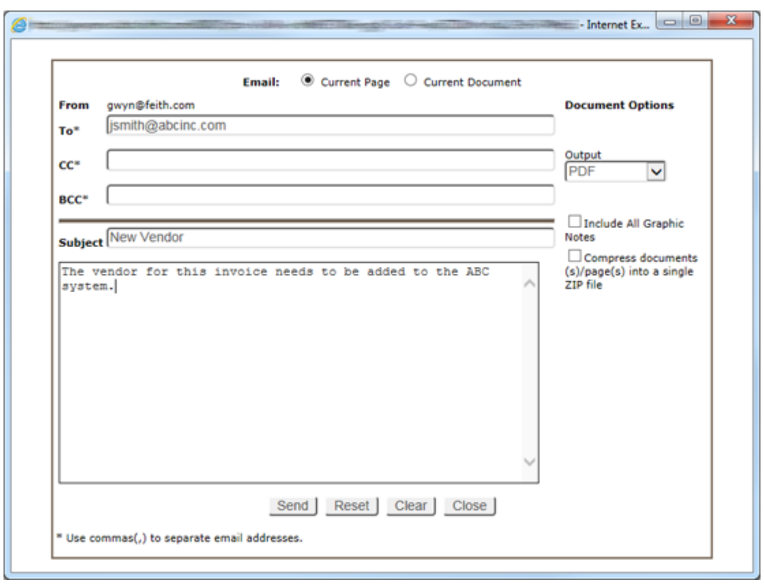
Warning: There is no size limitation to this feature. **USE CAUTION**. Inappropriate use of this feature could have a negative effect on your email system (for example, sending a 100 page document with the attachment file type option of "Separate files" will send an email with 100 attachments to the destination email address).

If you want to email the URL of a page or document instead, see Email URL to Page or Document.

Email a Page

To email a page:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page you want to email.
4. Under **Send to** click **Email** . The **Email** window opens.
5. Choose to email the **Current Page**.
6. Choose the desired **Document Options**:
   - **Output:** The output type for the page attachment.
   - **Include All Graphic Notes:** Turn this option on to include any graphic notes on the page.
   - **Compress document(s)/page(s) into a single ZIP file:** Turn this option on to attach the page in a ZIP file.
7. Enter the **From** and **To**. In the **To**, use commas to separate multiple email addresses.
8. Optionally enter the **CC** and **BCC**. Use commas to separate multiple email addresses.
9. Enter the **Subject**.
10. Enter text for the email body.



11. Click **Send**. The email is sent with the page.

Email a Document

To email a document or batch:

1. Search for the document or go to a bin. The list of results displays.
2. Select the desired document or batch by clicking **Select Row** .
3. Right-click and select **Email**. The **Email Current Document** window opens.
4. Choose the desired **Document Options**:
    - **Page Range:** Specify with pages of the document you want to email.
    - **Output:** The output type for the page attachment.
    - **Include All Graphic Notes:** Turn this option on to include any graphic notes on the page.
    - **Compress document(s)/page(s) into a single ZIP file:** Turn this option on to attach the page in a ZIP file.
    - **Put all pages in one file:** Turn this option on to put all the pages into one file (instead of separate files).
5. Enter the **From** and **To**. In the **To**, use commas to separate multiple email addresses.
6. Optionally enter the **CC** and **BCC**. Use commas to separate multiple email addresses.
7. Enter the **Subject**.
8. Enter text for the email body.
9. Click **Send**. The email is sent with the document.

Note: You may also email a document when viewing a document by going under **Send to** and selecting **Email .**

Email Multiple Documents

To email multiple documents or batches:

1. Search for documents or go to a bin. The list of results displays.
2. Select the desired documents by clicking **Select Row** .
3. Right-click and select **Email**. The **Email Multiple Documents** window opens.
4. Choose the desired **Document Options**:
    - **Output:** The output type for the page attachment.
    - **Include All Graphic Notes:** Turn this option on to include any graphic notes on the page.
    - **Compress document(s)/page(s) into a single ZIP file:** Turn this option on to attach the page in a ZIP file.
5. Enter the **From** and **To**. In the **To**, use commas to separate multiple email addresses.
6. Optionally enter the **CC** and **BCC**. Use commas to separate multiple email addresses.
7. Enter the **Subject**.
8. Enter text for the email body.
9. Click **Send**. The email is sent with the documents.

Email URL to Page or Document

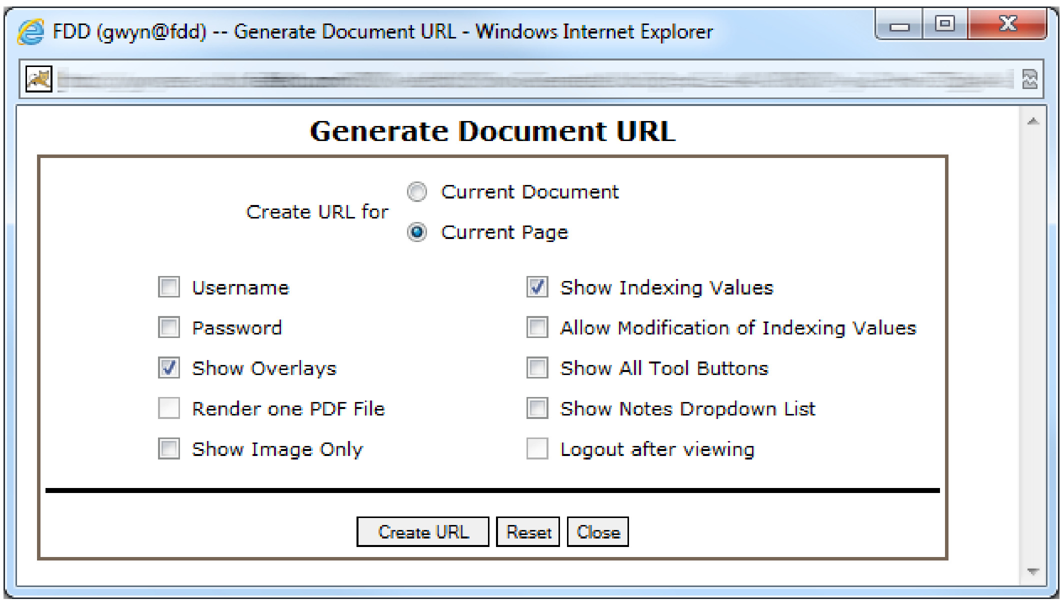
Email a WebFDD URL to a page or document or batch. The recipient can click the URL and be taken directly to the page or document.

If you want to email the page or document as an attachment instead, see Email Pages and Documents.

Email URL to Page

To email a URL to a page:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page you want to email.
4. Under **Send to** click **URL**. The **Generate Document URL** window opens.
5. Choose to generate a URL for the **Current Page**.
6. Choose the desired WebFDD URL options. Note that options may become available or unavailable depending on the selection of related options.



7. Click **Create URL**. The **Generated URL** displays.
8. Click **Email**. A new email message containing the generated URL is started in your default mail client
9. Address the email and add other information as desired.
10. Send the email. The email containing the page URL is sent.

Email URL to Document

To email a URL to a document or batch:

1. View a document or batch.
2. Under **Send to** click **URL** . The **Generate Document URL** window opens.
3. Choose to generate a URL for the **Current Document**.
4. Choose the desired WebFDD URL options. Note that options may become available or unavailable depending on the selection of related options.
5. Click **Create URL**. The **Generated URL** displays.
6. Click **Email**. A new email message containing the generated URL is started in your default mail client
7. Address the email and add other information as desired.
8. Send the email. The email containing the document or batch URL is sent.

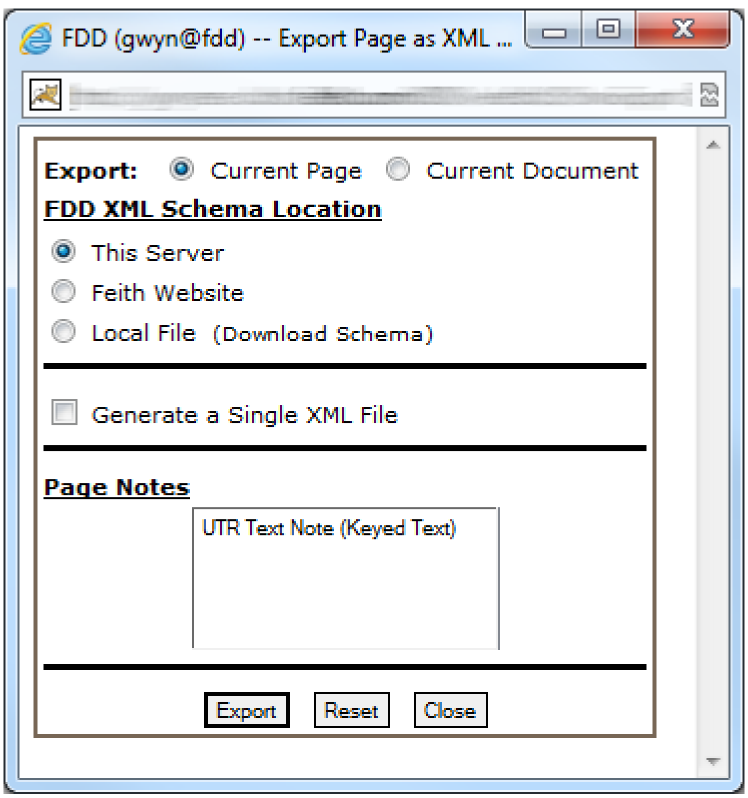
Export Pages and Documents

Export pages and documents from the FDD system to your local machine.

Export Page

To export a page:

1. View a document or batch.
2. Make sure you are in **Single** page view mode. See View Modes for more information.
3. Navigate to the page you want to export.
4. Under **Send to** click **Export**. The **Export** window opens.
5. Choose to export the **Current Page**.
6. Choose the desired export options
    - **FDD XML Schema Location:** Specify the preferred location of the FDD XML Schema.
    - **Generate a Single XML File:** Turn this option on to generate a single XML file.
    - **Page Notes:** Choose the page notes that you want to include.



7. Click **Export**. You are prompted to download the export file.
8. Download the export file. The page is exported.

Export Document

To export a document:

1. View a document or batch.
2. Under **Send to** click **Export** . The **Export** window opens.
3. Choose to export the **Current Document**.
4. Choose the desired export options
    - **FDD XML Schema Location:** Specify the preferred location of the FDD XML Schema.
    - **Generate a Single XML File:** Turn this option on to generate a single XML file.
    - **Include Page Notes:** Turn this option on to include page notes.
5. Click **Export**. You are prompted to download the export file.
6. Download the export file. The document is exported.

Work with Workflow iQ

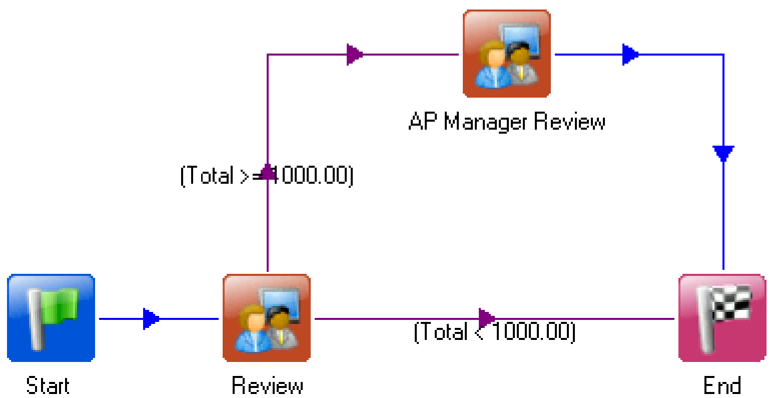
Workflow iQ Overview

Note: These instructions refer to the optional product Feith Workflow iQ.

A workflow is a combination of tasks and routes that moves a work item (workflow document or folder) through a set of business rules until the work is completed. Workflows are designed by an administrator in the Feith Workflow iQ Manager application. See Optional Components for more information on Workflow iQ.

- A task is a node where work is done.
- A route moves work items from task to task; it defines how and why work arrives at a particular task.

A workflow map illustrates the design of the workflow. Tasks are represented by icons and routes are represented by lines. For example, a workflow for processing employee expense reports might look like this:



One of the workflow task types is a user task. A user task is a node in the workflow where FDD users process work items. Users assigned to a workflow user task retrieve and process the items in their work queues through FDD or WebFDD. Workflow processing will vary per implementation, e.g. users may need to complete indexing information or review a document for approval.

Get started:

- Search for a workflow document
- Find work in the Work To Do window
- Process a workflow document
- Modify a workflow document's index values
- Look at all documents in a workflow; their task, status, and more

Work To Do Screen

Note: These instructions refer to the optional product Feith Workflow iQ.

The Work To Do screen shows all workflows and workflow tasks to which you have access that contain work. To open the Work To Do window, click the **Workflows** tab and then click **Work To Do**  in the upper left corner of the screen.

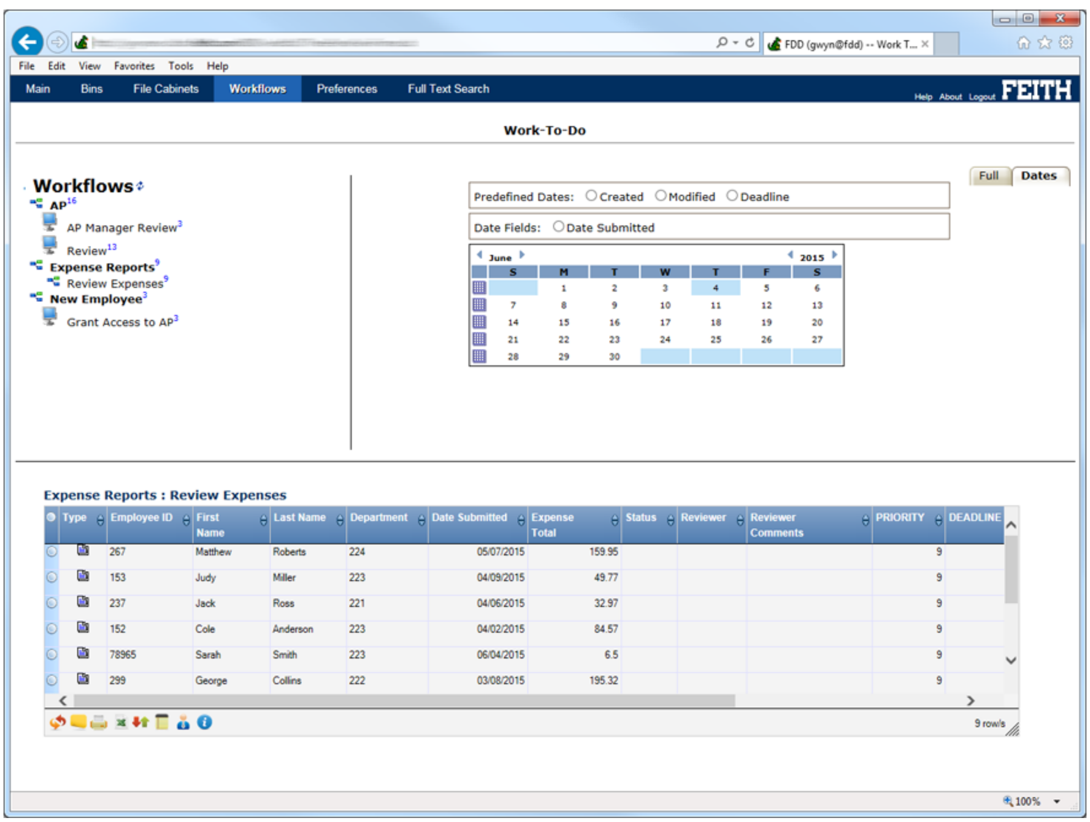
The Work To Do screen is divided into three panes:

- The workflow task list shows all workflow tasks to which you are assigned that contain work. Click the name of a workflow task to see the work items listed in the bottom pane of the window.
- **The calendar** allows you to search for work items in the selected task by date or another search.

  Available **Dates** to search include when the work item was **Created**, when the work item was last **Modified**, the **Deadline** (if any) associated with the work item, and any date type index fields in the task. Select the desired option and click a date to filter the list.

  You may also bring up the **Full** search screen, enter search criteria, and click **Search** to look for work items by their index values. See Search Work To Do in Specific Task for more information in searching for work items by their index values.
- The work item list shows all work items in the selected workflow task. The work item list may be filtered further based on selected criteria, if any, in the calendar pane. Click a work item to view it or perform other actions in the work item list right-click context menu (see The Work Item List Right-Click Context Menu for more information).

  If desired, adjust how the work item list grid displays, such as hiding columns. The Grid for more information.



The Work Item List Right-Click Context Menu

Right-click on the work item list to open its context menu. The options are as follows:

- **View:** View the work item in the task. Alternatively, you may left-click the work item to view it. See View Workflow Document in Task for more information on viewing work items.
- **Email:** Email the work item. See Email Document for more information.
- **Properties:** View the work item's properties (e.g. item type, internal ID, who created it, etc).
- **Unlock:** Unlock a work item locked by you to make it available for other workers. See Unlock Workflow Document for more information.
- **Collect:** Collect a work item into a collection. See Collect Documents for more information.

Search for Workflow Documents

Note: These instructions refer to the optional product Feith Workflow iQ.

You can search for work items in either the general Work to Do interface or a specific workflow task.

Search Work To Do

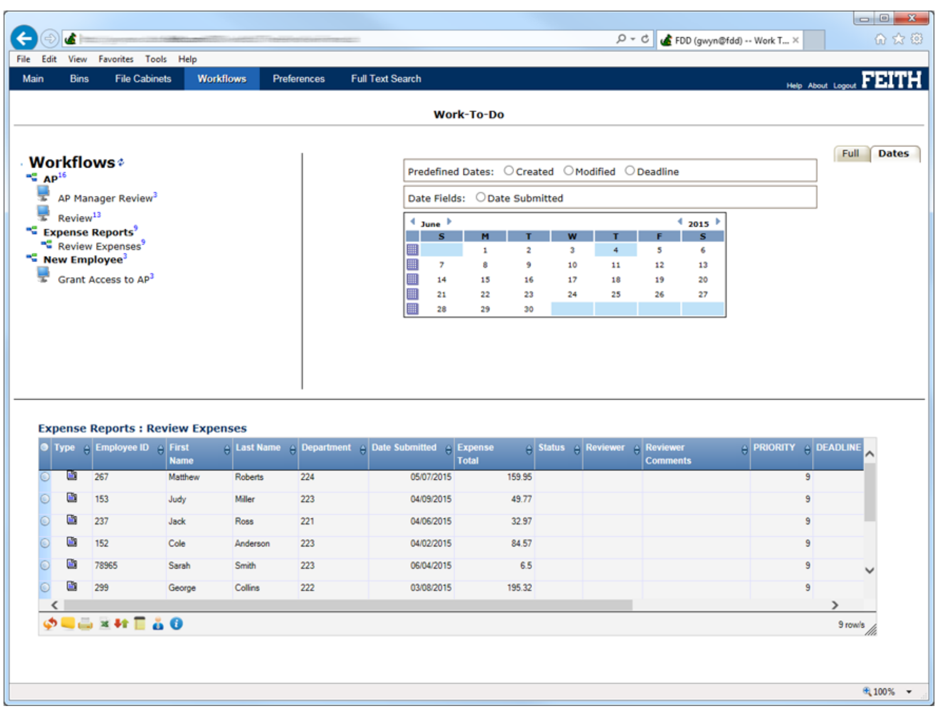
To search for work items using the general Work To Do interface:

1. In the **Workflows** tab click **Work To Do** in the upper left corner of the screen. The **Work-To-Do** screen displays listing the workflows and tasks to which you have access that contain work. See Work To Do Screen for more information.
2. Click a task name to view the work items in that task. The available work is listed in the bottom pane.
3. Optionally filter the work item list using the calendar pane in the upper right, searching on **Dates** or using the **Full** search.

   Available **Dates** to search include when the work item was **Created**, when the work item was last **Modified**, the **Deadline** (if any) associated with the work item, and any date type index fields in the task. Select the desired option and click a date to filter the list.

   You may also bring up the **Full** search screen, enter search criteria, and click **Search** to look for work items by their index values. See Search Work To Do in Specific Task for more information in searching for work items by their index values.

   If desired, adjust how the work item list grid displays, such as hiding columns. The Grid for more information.



4. Click the desired work item. The work item is displayed in the task and ready to be processed. See View Workflow Document in Task and Process Workflow Documents for more information.

Search Work To Do in Specific Task

To search for work items in a specific task:

1. In the **Workflows** tab click the name of a task. The **Search Work-To-Do** screen displays.

   By default the **Grid** search interface displays. Alternatively, you may use the **Form** search layout. See Search Layouts for more information. The default search layout is set in your preferences and can be changed as you desire (see Change Preferences for more information).

2. Optionally enter search criteria in the task index fields. Index values are key pieces of information for identifying and finding the document (see Introduction to Indexing for more information on index values). You can make your search very broad by entering few values, or narrow the search by specifying many values. There are various options for entering search criteria:

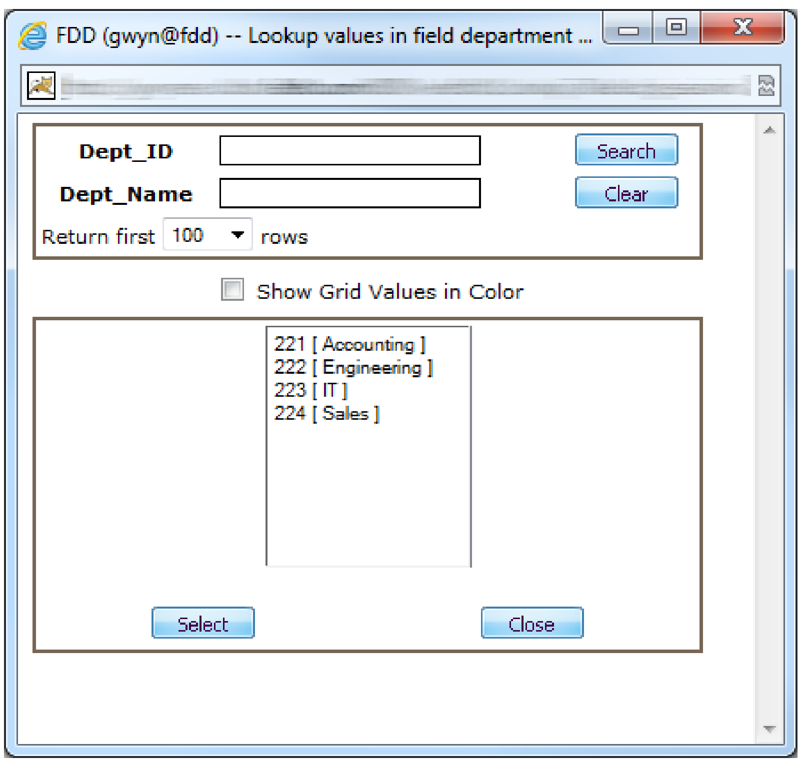
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - Use wildcards, operators, and keywords to help construct your search criteria. See Search with Wildcard, Operators, and Keywords for more information.
   - If a field has a binoculars icon, click it to choose from a list of suggested values in the **Lookup values** dialog.

     To choose a value from a lookup table:

     In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

     By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

     Select the desired value in the list and click **Select** to insert the value into the field.

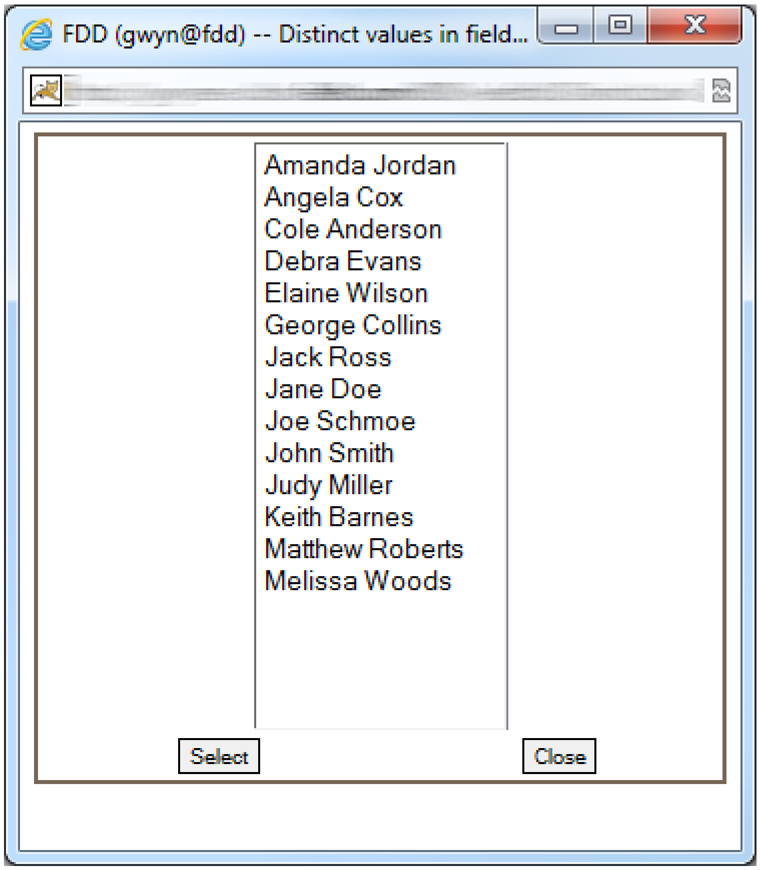


- Select from a list of distinct values that already exist for that index field by clicking the field name. Note that a task with many work items may take a long time to return the results of a distinct search.

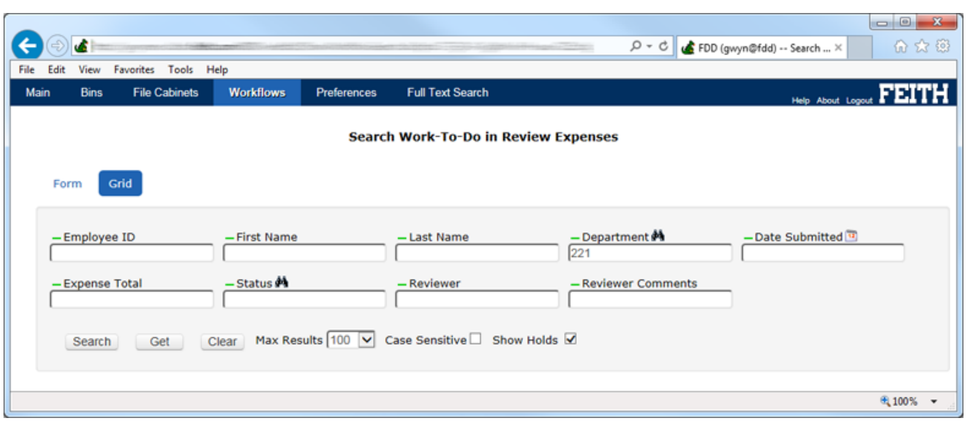
  To choose a value from the distinct values list:

  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.

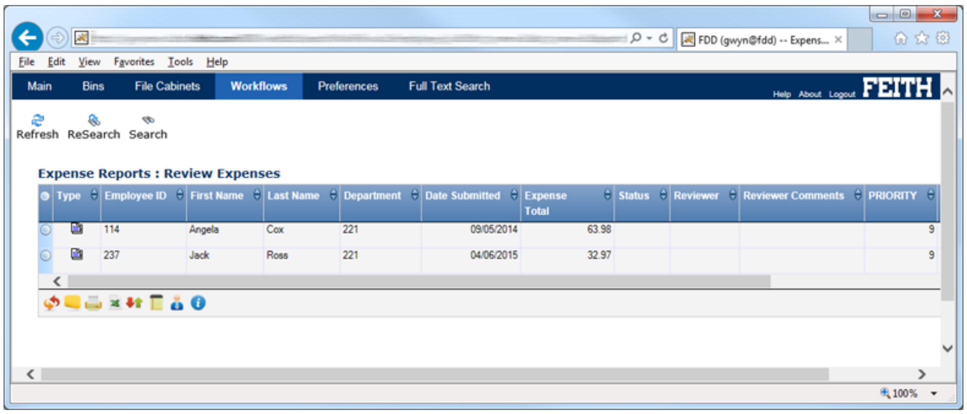


- **Note:** If you enter no search criteria you will perform a "blank" search that will return all work items in the task. Note that a task with many work items may take a long time to return the results of a blank search.



3. Optionally turn **Case Sensitive** search on or off. Note it may take longer to return the results of a case-insensitive search. The default setting of **Case Sensitive** is set in your preferences and can be changed as you desire (see Change Preferences for more information).
4. Optionally change **Max Results** to set the maximum number of work items that can be returned in a search. The default **Max Results** is set in your preferences and can be changed as you desire (see Change Preferences for more information).
5. Optionally turn on **Show Holds** to include work items you have put on hold in the results. See Place Document on Hold for more information.
6. Click either **Search** or **Get**:

   - **Search** returns the list of work items.

     Click a work item to retrieve it. The work item is displayed in the task and ready to be processed. See View Workflow Document in Task and Process Workflow Documents for more information.

     If desired, adjust how the work item list grid displays, such as hiding columns. The Grid for more information.

     You may click **Search** to return to the search interface and refine your search criteria or do a different search. You may also click **ReSearch** to search again using the same criteria.

   - **Get** retrieves the first work item it finds that matches the search criteria and displays it in the task. The work item is ready to be processed. See View Workflow Document in Task and Process Workflow Documents for more information.

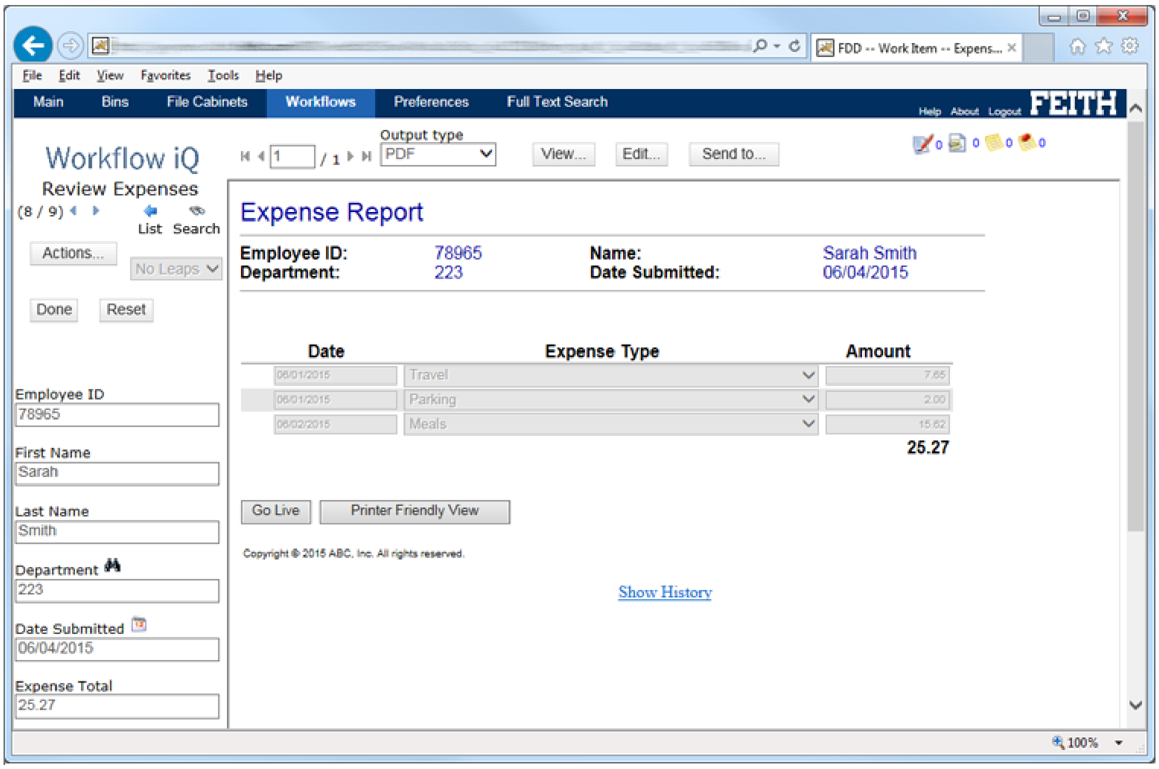
View Workflow Document in Task

Note: These instructions refer to the optional product Feith Workflow iQ.

View a work item in a workflow task to process the work item and perform other actions.

To view a work item, search for it in the general Work To Do interface or a specific workflow task and retrieve it. See Search for Workflow Documents for more information on searching and retrieving work items.

The work item displays in the task:



You may:

- Under **View**, choose to display the work item in **Single** page, **All** pages, or **Mini** pages view mode. See View Modes for more information.
- Navigate the work items, according to whether you did a **Search** or **Get** (see Search for Workflow Documents for more information):
  - **Search:** Navigate through the list of work items using the arrows (8 / 9). You may click **List** to return to the search results list or click **Search** to return to the search interface and do another search.
  - **Get:** Navigate through the available work items by clicking **Get Next**. You may click **Search** to return to the search interface and enter new criteria.
- Modify the work item's index values. See Modify Index Values in Workflow for more information.
- Process the work item as needed. See Process Workflow Documents for more information.
- If a Forms iQ form launches automatically when you view a work item, your task has a Forms iQ integration link for processing the work item. See Integration Links for more information.
- Perform workflow **Actions** on the work item. See Workflow Actions for more information.

- Select from the list of **Leaps** to perform a leap on the document. See Leaps for more information.
- See The View Window for more information on other controls and functions, such as rotating pages, reordering pages, adding pages, emailing, exporting, notes, etc.
- **Note:** If you see the **General Object** page instead of the page itself, the page is GOS (a General Object). See View General Objects for more information.

Workflow Actions

Click the **Actions** button on the left to view the workflow actions you may perform on the work item:

	Save	Save changes made to the work item's index values. See Modify Index Values in Workflow for more information.
	Delete	Delete the work item from the system. See Delete Pages and Documents for more information on deleting documents.
	Deadline	Change the work item's deadline. See Change Document Deadline for more information.
	Ad Hoc	Route the work item to another task on an as-needed basis. See Ad Hoc Route Document for more information.
or	**Hold** or **Release**	Put the work item on hold for yourself, or release a work item that you had put on hold. A work item on hold is reserved for you and not available to any other workers. See Place Document on Hold for more information.
	Priority	Change the priority of the work item. Workflow priority is on a scale of **1** to **9**, with **1** being the highest priority. See Change Document Priority for more information.
	History	View the workflow history of the work item, including where the work item went and who took action on it. See View Workflow History for more information.
	Search	Return to the task search interface.
	List	Return to the work item search results list. **Note:** This option is not available if you did a **Get** (as opposed to a **Search**). See Search Work To Do in Specific Task for more information.
	Withdraw	Remove the work item from the workflow or the task. See Withdraw Document for more information.

Process Workflow Documents

Note: These instructions refer to the optional product Feith Workflow iQ.

When you process, or "done", a work item, it is sent to the next task in the workflow.

To process a work item:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.

   Note: If a Forms iQ integration link launches, see Integration Links instead for how to process a work item in a task with a Forms iQ integration link.

2. Work the document as necessary.
3. Click **Done**.
4. If you are prompted to select **Manual Routes**, select one or more routes from the list as needed and click **OK**:
   - **Single:** Select one, and only one, **Single** route.
   - **Multiple:** Select one or more of the **Multiple** routes.
   - **Optional:** Select one or more, or none if desired, of the **Optional** routes.
5. If you are prompted to save index values, click **OK** to save your index value changes and proceed. You may turn this prompt off so that the index values always save without asking (see Change Preferences for more information).
6. The work item proceeds to the next step in the workflow and the next work item in the workflow task is retrieved.

Integration Links

Note: These instructions refer to the optional product Feith Workflow iQ.

An integration link is assigned to a workflow task when action is required outside of WebFDD in order to process the workflow documents. If a task has an integration link assigned to it, the link will launch automatically when you retrieve a work item from that task. Integration links are configured in Workflow iQ Manager (see **Workflow iQ Manager User Guide** for more information).

To process a work item in a task with a Forms iQ integration link:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. The Forms iQ integration link launches automatically.
3. Fill out the form and work the document as necessary.
4. Click **Submit** on the form. The document is marked as **Done**.
5. If you are prompted to select **Manual Routes**, select one or more routes from the list as needed and click **OK**:
    - **Single:** Select one, and only one, **Single** route.
    - **Multiple:** Select one or more of the **Multiple** routes.
    - **Optional:** Select one or more, or none if desired, of the **Optional** routes.
6. The work item proceeds to the next step in the workflow and the next work item in the workflow task is retrieved.

Modify Index Values in Workflow

Note: These instructions refer to the optional product Feith Workflow iQ.

Document and folder index values, also referred to as metadata, can be modified by users with the appropriate task and resource permissions. Modification may be necessary to correct an indexing mistake or to enter new information.

To modify the index values of a work item:

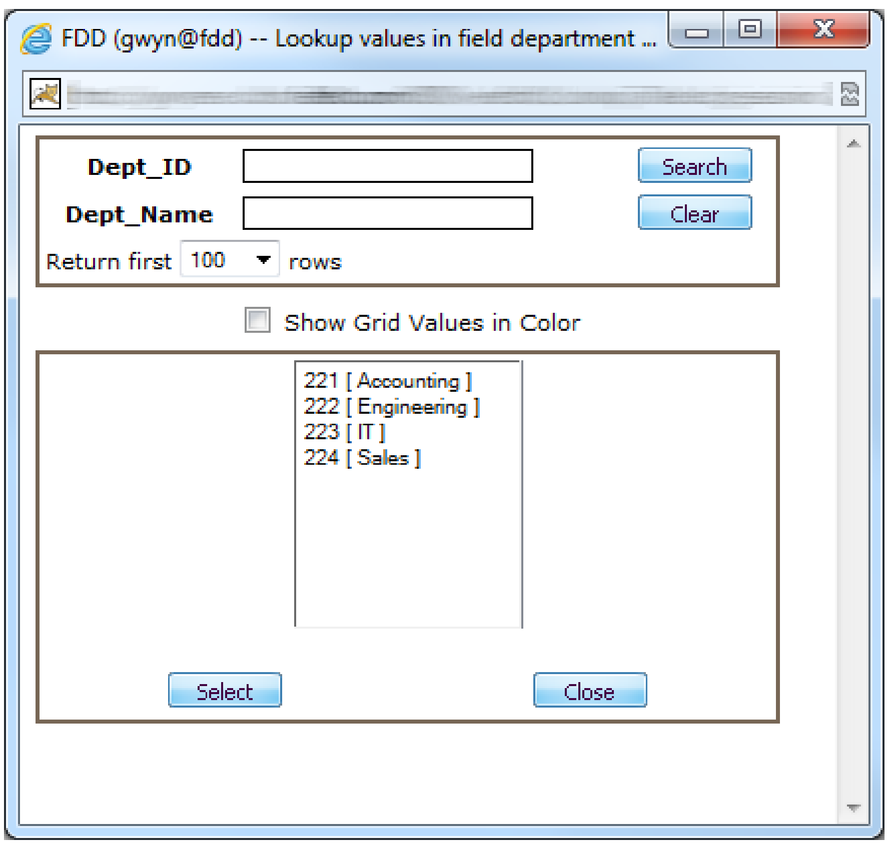
1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Enter or change index field values as desired. There are various options for setting index values:
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - If a field has a binoculars icon, click it to choose from a list of suggested values in the **Lookup values** dialog. Note that if the binoculars are red, the value *must* be chosen from the list of suggested values.

     To choose a value from a lookup table:

     In the **Lookup values** window the list of suggested values displays. To filter the list, enter search criteria in the fields at the top and click **Search**. You may search with a wildcard, e.g. search **A*** to display values that start with "A".

     By default only the first 100 rows are returned. Change the **Return first _ rows** option and click **Search** to see more rows.

     Select the desired value in the list and click **Select** to insert the value into the field.

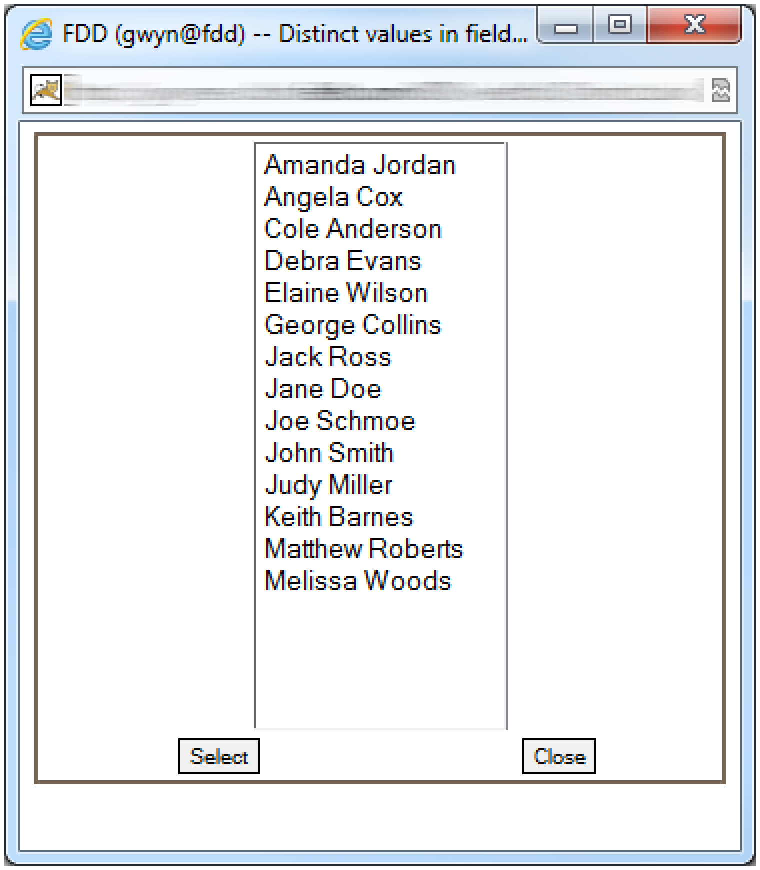


- Select from a list of distinct values that already exist for that index field by clicking the field name. Note that a task with many work items may take a long time to return the results of a distinct search.

  To choose a value from the distinct values list:

  In the **Distinct values** window the list of unique values in the file cabinet field display.

  Select the desired value and click **Select** to insert the value into the field.



- Note that some index fields may be read-only. You are prevented from entering data into read-only fields.

- If entering multiple values into a list field, enter each value on a separate line using the **ENTER** key.

3. Click **Save** . The index values are saved.

   Note: If you change index values and, without saving the changes first, do an action that moves the work item to another task (e.g. "done" the work item), then you may be prompted to save your changes. You may turn the prompt off so that the index values always save without asking (see Change Preferences for more information).

-

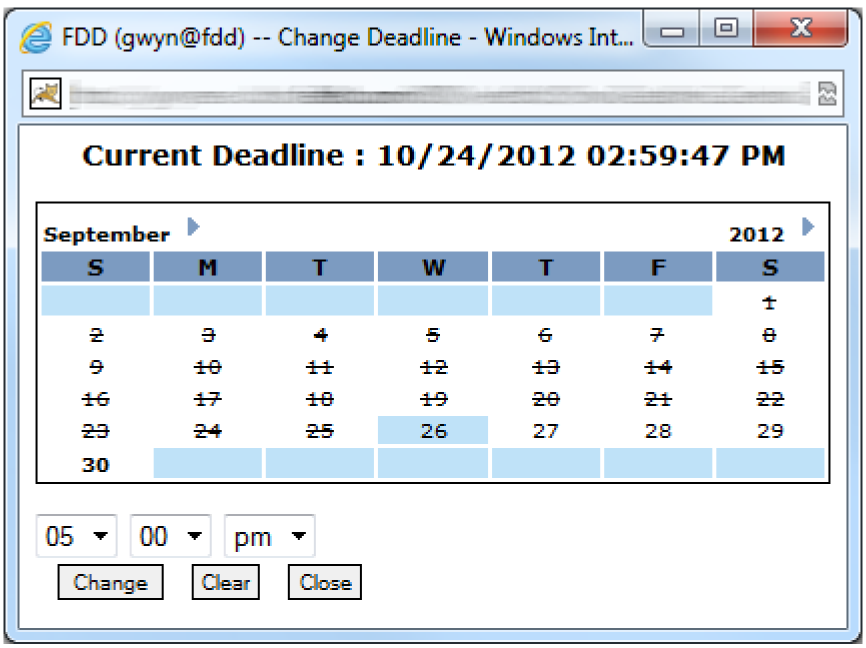
Change Document Deadline

Note: These instructions refer to the optional product Feith Workflow iQ.

If a work item has a deadline, the work item will be removed from the workflow task if it is not processed before the deadline expires. The deadline can be changed by users with the appropriate task and resource permissions.

To change the deadline:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **Deadline**. The **Change Deadline** window opens and displays the work item's current deadline.
3. Select the new date and time for the deadline.



4. Click **Change**. The deadline is changed.

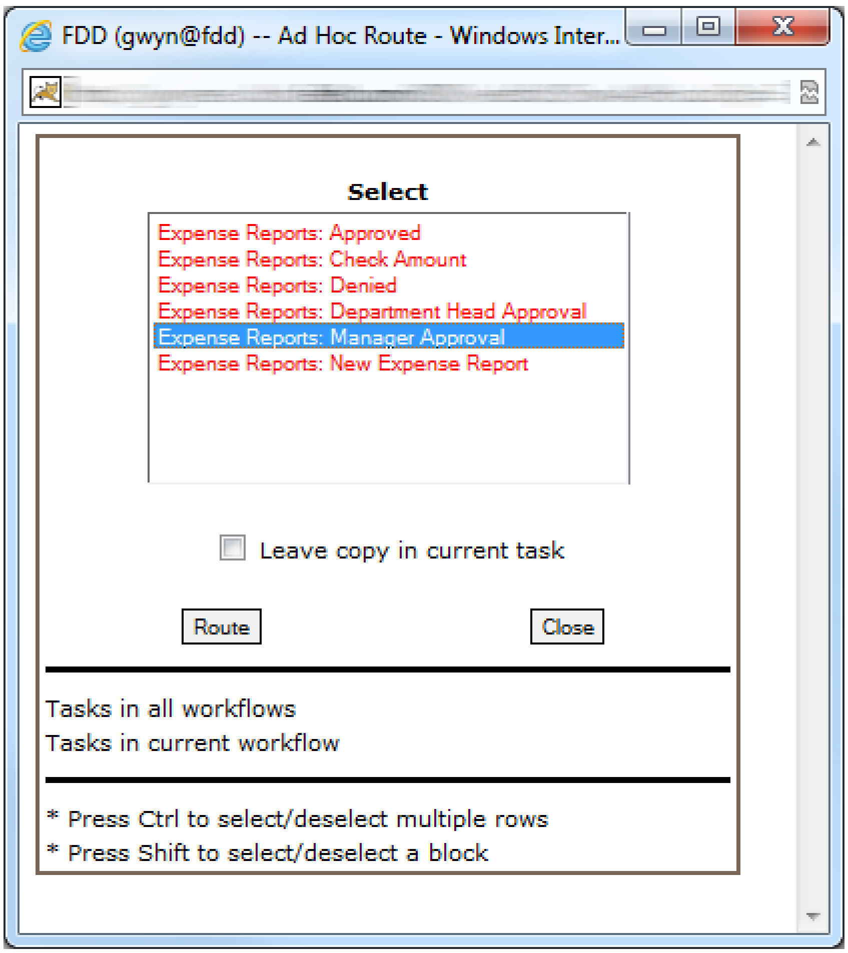
Ad Hoc Route Document

Note: These instructions refer to the optional product Feith Workflow iQ.

Move a work item from one workflow task to another task on an as-needed basis.

To ad hoc route a work item:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **Ad Hoc**. The **Ad Hoc Route** window opens and displays a list of tasks. Task names in red are tasks in the current workflow; task names in blue are tasks in other workflows that are built on the same base file cabinet as the current workflow.
3. Select the desired task. You may select multiple tasks using **CTRL+click** or **SHIFT+click**.



4. Click **Route**.
5. If you are prompted to save index values, because you made a change, click **OK** to save your index value changes and proceed. You may turn this prompt off so that the index values always save without asking (see Change Preferences for more information).
6. The work item is ad hoc routed to the selected task(s).

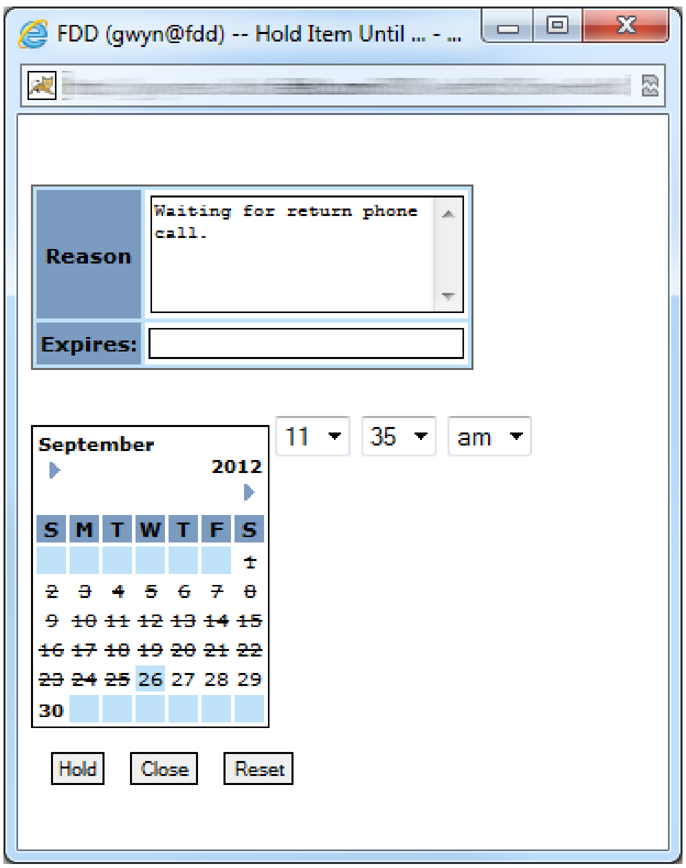
Place Document on Hold

Note: These instructions refer to the optional product Feith Workflow iQ.

A work item can be placed on hold if you want to finish working on it later. Once a work item is on hold, it is reserved for you and other workers cannot retrieve or process the work item.

To place a work item on hold:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **Hold**. The **Hold** window opens.
3. Optionally enter a **Reason** for the hold or when the hold **Expires**.



4. Click **Hold**. The work item is put on hold for you and is not available to other workers.

Release Hold

To release work item on hold:

1. Retrieve the work item. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **Release**. The hold is removed and the work item is available to other workers.

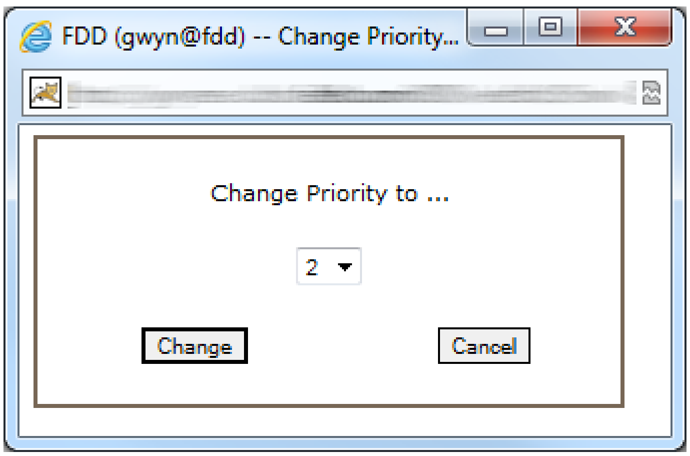
Change Document Priority

Note: These instructions refer to the optional product Feith Workflow iQ.

Work item priority is assigned on a scale of 1 to 9, with 1 being the highest priority.

To change the priority of a work item:

1. To place a work item on hold:
    1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
    2. Under **Actions** click **Priority** . The **Change Priority** window opens.
    3. Select the new priority.

    4. Click **Change**. The priority is changed.

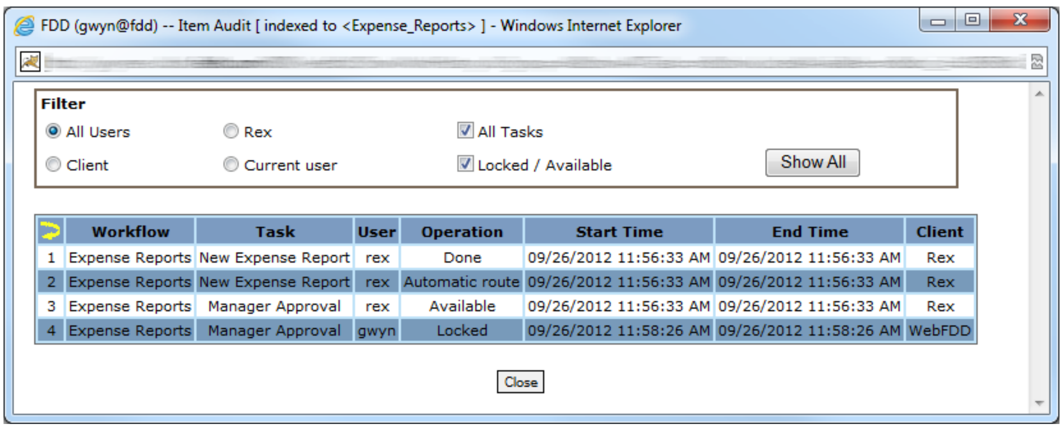
View Workflow History

Note: These instructions refer to the optional product Feith Workflow iQ.

Workflow history serves as the workflow audit trail for each work item. It lists all the tasks a work item has passed through in the workflow.

To view workflow history:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **History** . The **Item Audit** window opens.
3. Use the **Filter** to filter the history based on user or client, as well as choosing if you want to view **All Tasks** or **Locked / Available** status changes. You may also click **Show All** to see all available history.



Workflow history includes the following information:

- **Workflow:** The workflow where the event occurred.
- **Task:** The workflow task where the event occurred (if applicable).
- **User:** The user who caused the event.
- **Operation:** The type of event.
- **Start Time:** The date and time the event occurred.
- **End Time:** The date and time the event ended (if applicable).
- **Client:** The application in which the event was caused.

Withdraw Document

Note: These instructions refer to the optional product Feith Workflow iQ.

Withdraw a work item to remove it from a workflow or task. Note that withdrawing a work item does not delete it from the system.

To withdraw a work item:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Under **Actions** click **Withdraw** . The withdraw options display.
3. Choose where you want to withdraw the work item from:
   - **Withdraw from Task :** Remove the document from the current workflow task.
   - **Withdraw from Workflow :** Remove the document from all tasks in the workflow.
4. You are prompted to confirm the withdrawal.
5. Click **OK** to proceed and withdraw the work item. The work item is withdrawn.

View Your Workflow Instructions

Note: These instructions refer to the optional product Feith Workflow iQ.

Your workflow administrator has the option to set instructions for your workflow task. These instructions provide you with information on how to process your workflow documents.

If instructions exist on your workflow task, the **Instructions** button displays (if the button is not there, there are no instructions on the task).

To view your workflow task instructions:

1. Retrieve a work item in the task. See Search for Workflow Documents and View Workflow Document in Task for more information.
2. Click **Instructions**. The **Instructions** window opens and displays your instructions.

Add Document to a Workflow

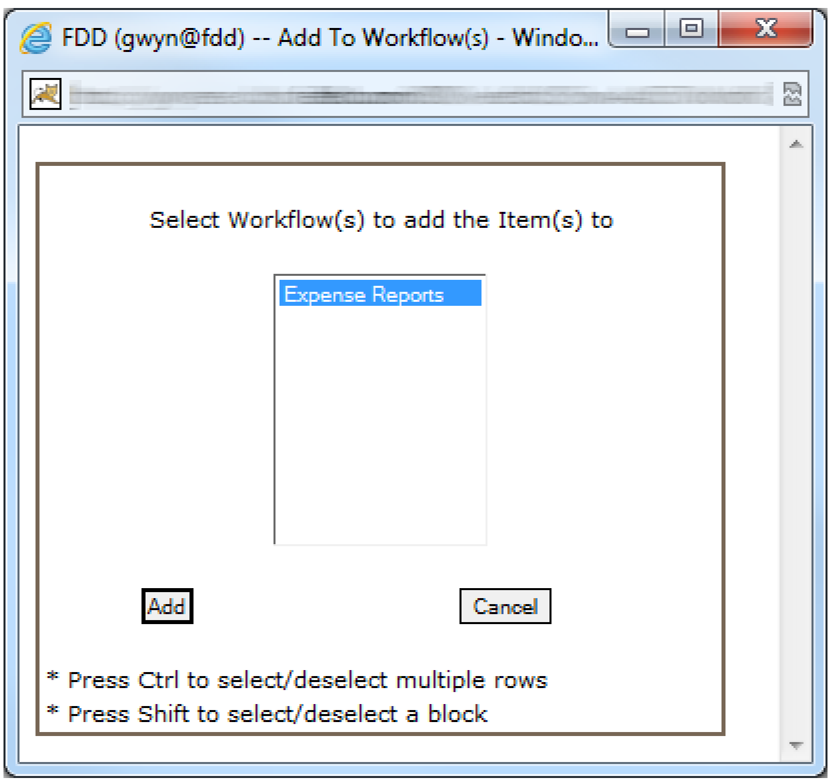
Note: These instructions refer to the optional product Feith Workflow iQ.

Documents or folders can be manually added to a workflow. This may be useful if a document was indexed before the workflow was created or if an indexing mistake prevented the document from entering the workflow.

To add a document or folder to a workflow manually:

1. Search for the document. See Search for Documents for more information.
2. Select the desired document by clicking **Select Row** . You may select multiple documents to add to the workflow.
3. Right-click the document and select **Add to Workflow**. The **Add To Workflow** window opens.
4. Select the desired workflow. You may select multiple workflows using **CTRL+click** or **SHIFT+click**.

   Note: The workflow list displays all workflows to which you have permission to manually add documents. The FDD Administrator can restrict this permission on a per workflow basis in Feith Workflow iQ Manager.

5. Click **Add**. The document(s) is added to the selected workflow(s).

Unlock Workflow Document

Note: These instructions refer to the optional product Feith Workflow iQ.

When you retrieve a work item in a task and view it, it is locked for you and other workers cannot retrieve it. You may unlock a work item locked by you to make it available for other workers.

To unlock a work item:

1. Search for a work item. See Search for Workflow Documents for more information.
2. Select the desired work item by clicking **Select Row** . You may select multiple documents to unlock.
3. Right-click the work item and select **Unlock**. You are prompted to confirm the unlock.
4. Click **OK** to continue with unlocking the work item. The work item(s) is unlocked and available for other workers.

The Admin File Cabinet

Note: These instructions refer to the optional product Feith Workflow iQ.

If you are in the workflow administration group, you have access to the workflow admin file cabinet. You can use the admin file cabinet to find work items in your workflow.

Find Work Items in a Workflow Admin File Cabinet

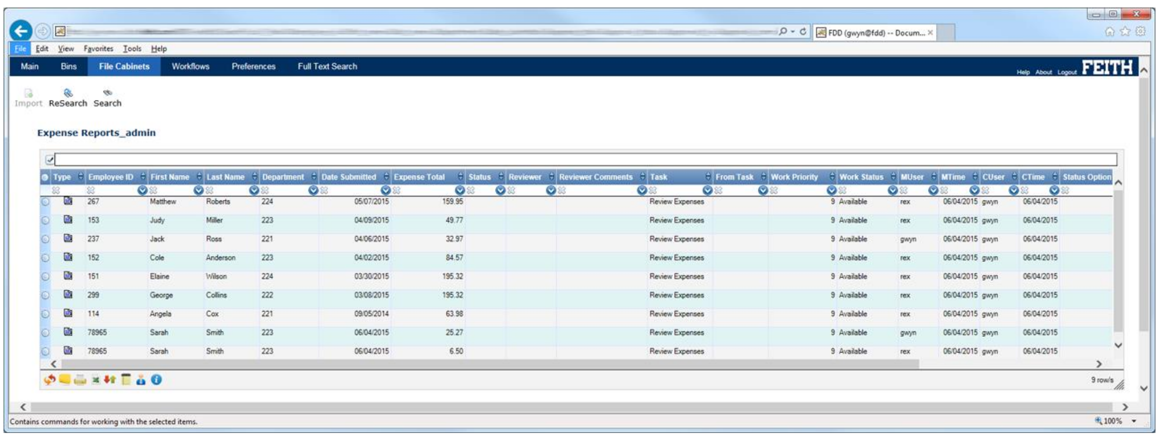
The admin file cabinet is named after the workflow, with the word admin appended to the workflow name. For example, if your workflow is named AP then your admin file cabinet is named AP_admin.

Admin file cabinets are located in the file cabinets list under the **Main** or **File Cabinets** tabs.

To view work items in an admin file cabinet:

1. Select the file cabinet where you want to search. The **Search in File Cabinet** screen displays.
2. Enter search criteria in the file cabinet index fields.
3. Optionally change **Max Results** to set the maximum number of documents that can be returned in a search. The default **Max Results** is set in your preferences and can be changed as you desire (see Change Preferences for more information).
4. Click **Search**. All documents that match your search criteria are listed in the file cabinet grid.

See Search for Documents for more information on finding documents in a file cabinet.



What Does the Admin File Cabinet Show?

Each work item in the workflow is listed in the admin file cabinet. The admin file cabinet fields include all fields in the workflow base file cabinet, plus the fields listed in the following chart. These additional fields show workflow status information for the work items.

Task	Current location of the work item.
Work Priority	Priority of the work item. Priority is assigned on a scale of **1** to **9**, with **1** being the highest priority.
Work Status	Current status of the work item. Statuses are as follows: • **Available:** The work item is available to be worked.

	• **Locked:** The work item is being worked. • **Done:** The work item has been processed. • **Hold:** The work item is on hold for a workflow user. • **Ad Hoc:** The work item is waiting to be ad hoc routed to another task. • **Completed:** The work item has completed the workflow. • **Error:** REX (Feith Rules Engine) encountered an error while processing the work item. • **Withdrawn:** The work item is waiting to be removed from the workflow.
MUser	User who last modified the work item.
MTime	Date and time the work item was last modified.
CUser	User who created the work item.
CTime	Date and time the work item was created.
WF Deadline	The deadline for the workflow, if a workflow deadline is set. (May be blank.)
Task Deadline	The deadline for the current task, if a task deadline is set. (May be blank.)
Hold Reason	The reason why the work item is on hold, if the work item is on hold. (May be blank.)

Work with Forms iQ

Forms iQ Overview

Note: These instructions refer to the optional product Feith Forms iQ.

Feith Forms iQ is a web-based electronic forms solution. The Feith Forms iQ Designer allows a designer to create web forms for use with the FDD system. See Optional Components for more information on Forms iQ.

Each form is based on a file cabinet and submitted forms are stored as documents that base file cabinet. Forms iQ documents can be updated from within FDD or WebFDD and can be workflowed.

Get started:

- Display Forms iQ Document
- Update Forms iQ Documents ("Go Live")
- View Forms iQ Document History

Display Forms iQ Document

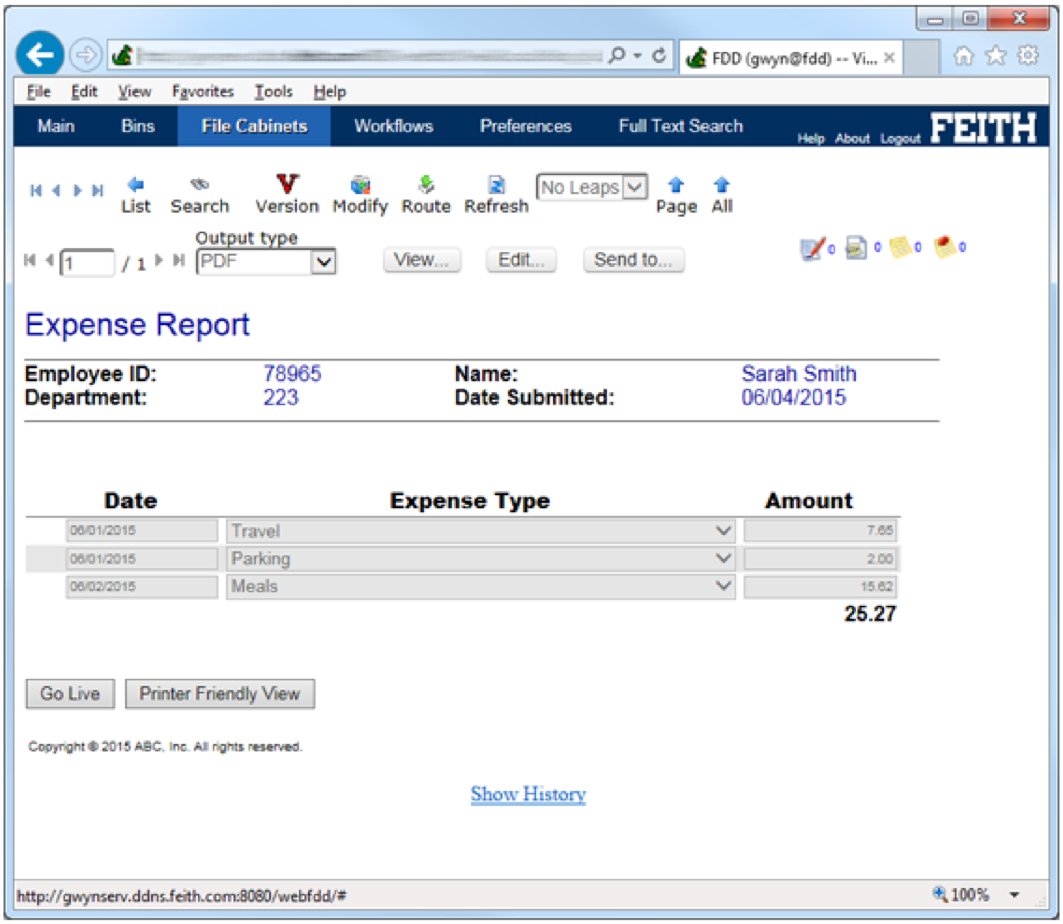
Note: These instructions refer to the optional product Feith Forms iQ.

Forms iQ documents are stored in file cabinets and can be displayed through FDD or WebFDD.

To display a Forms iQ document:

1. Search for a document. The search results display. See Search for Documents for more information.
2. Left-click a document in the file cabinet grid to view it. The Forms iQ document displays in the **View Document** screen.

   If you are processing the Forms iQ document in a workflow, retrieve the document in your workflow task to display the document. See Workflow Overview for more information on Workflow iQ.



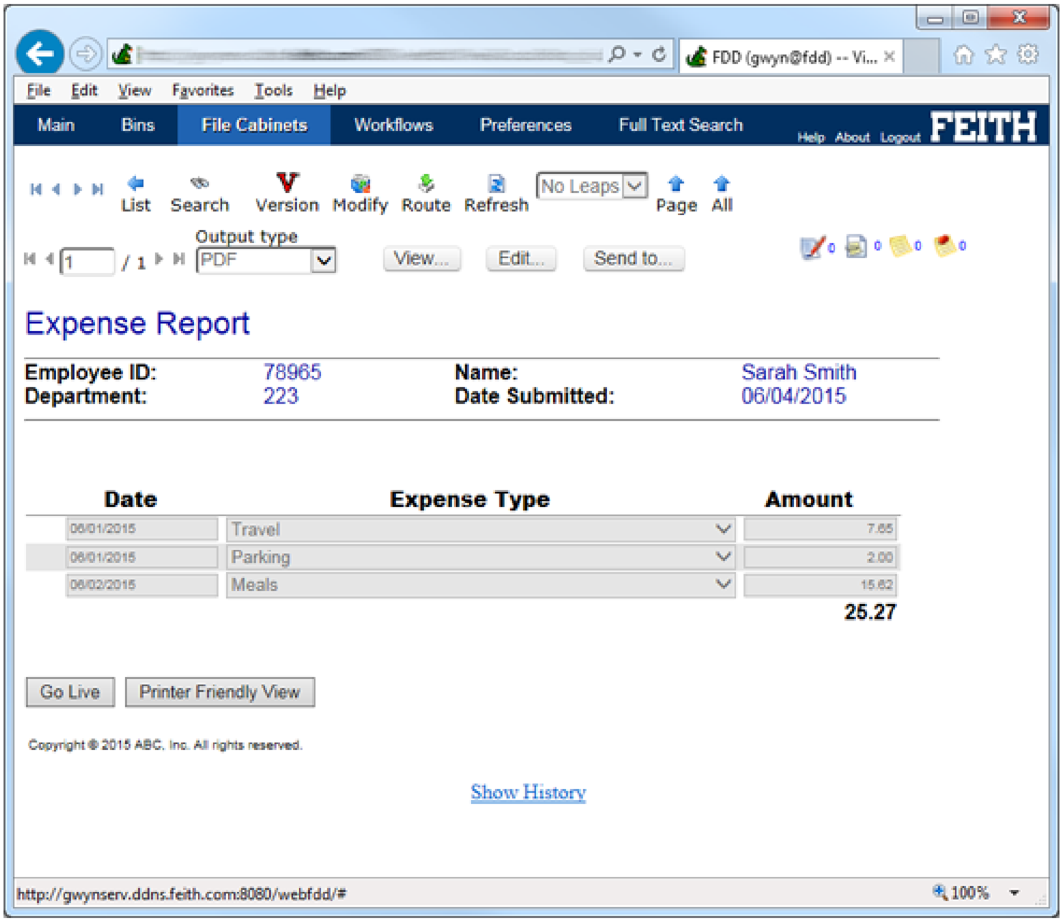
Update Forms iQ Document ("Go Live")

Note: These instructions refer to the optional product Feith Forms iQ.

When a Forms iQ form is created, the designer may have configured the form to allow "Go Live" functionality on the form. If "Go Live" is allowed, you can update the form field data from within the Feith Document Database clients (FDD or WebFDD).

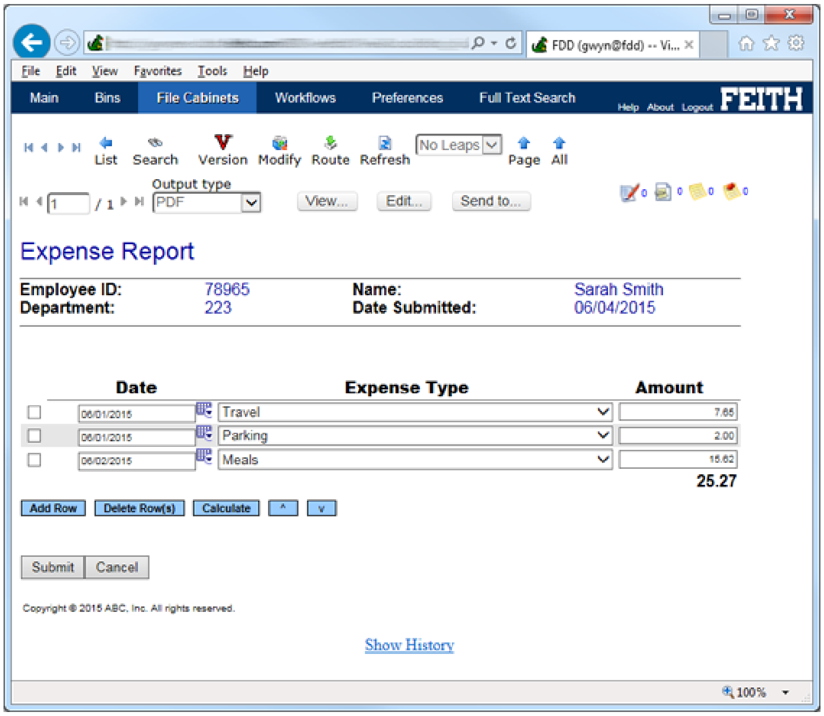
To update a Forms iQ document:

1. Search for and view the Forms iQ document.

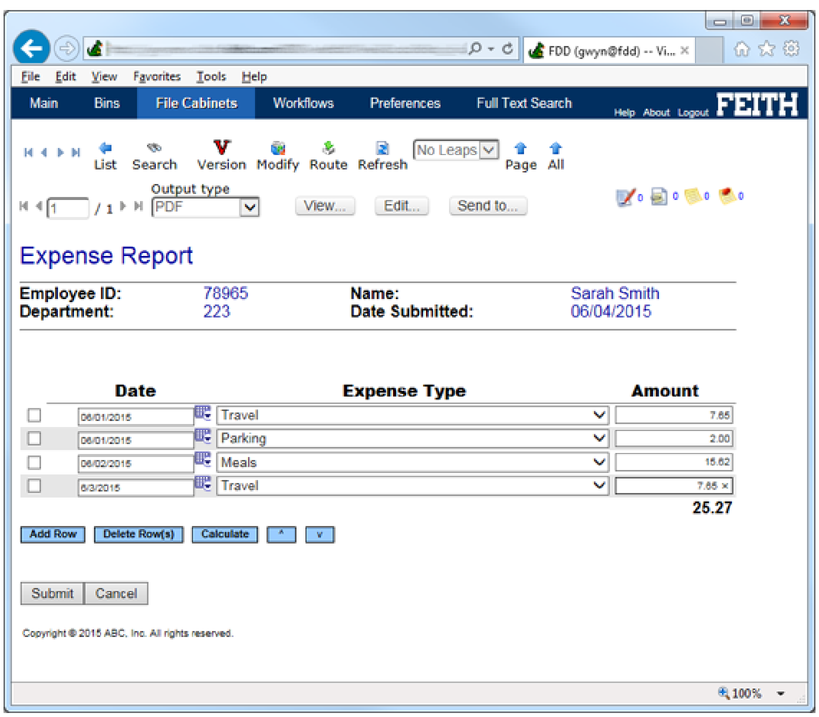


2. Click **Go Live**. The document is re-displayed in an edit mode.

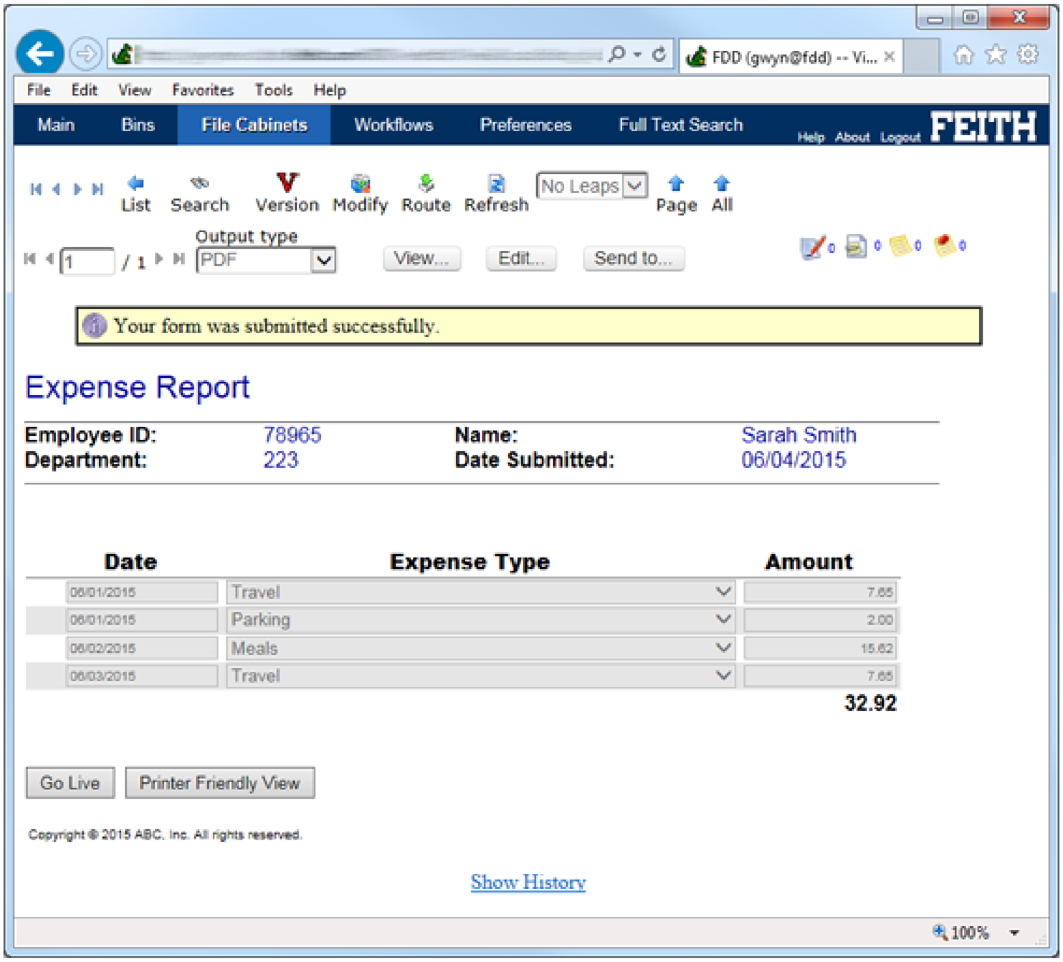
   Note: If you do not have "Go Live" permission for the form, the **Go Live** button does not appear on the form page.



3. Edit any of the form fields as needed.



4. Click **Submit**. The form is submitted and the document is updated. A success message displays at the top of the form to indicate the values were successfully saved.



Depending on the form design, form field data is stored to one of three locations: in the file cabinet fields, in the Forms iQ document, or in a table. When your changes are submitted, you will notice the updated values on the Forms iQ document and may also notice updated index values in the file cabinet. (If the index values are updated, the change will be noticeable the next time you retrieve the document.)

Note: If you edit the index values of a Forms iQ document, the document is re-displayed when you save your changes. If any of the edited file cabinet fields store form field data, the form field is updated to reflect the new value.

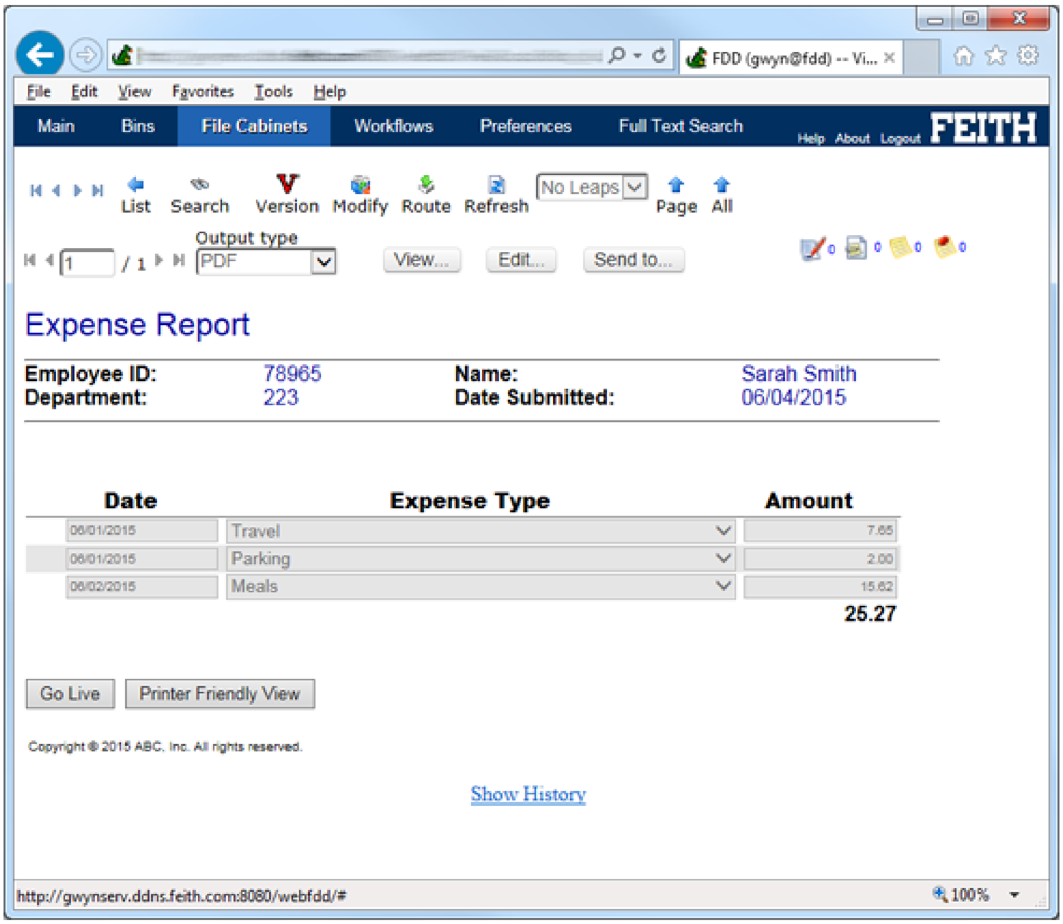
View Forms iQ Document History

Note: These instructions refer to the optional product Feith Forms iQ.

If a Forms iQ document has been updated (either by "Going Live" or by editing its index values), you can view the history of changes made to the document.

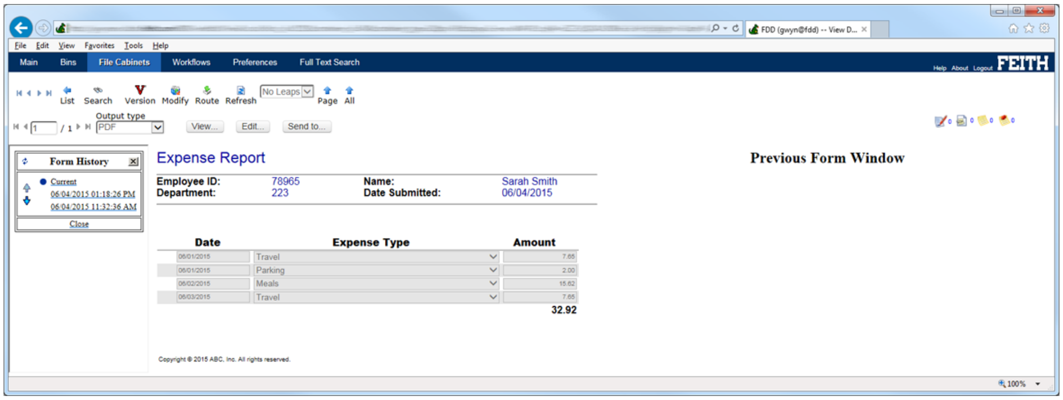
To view Forms iQ document history:

1. Search for and view the Forms iQ document.

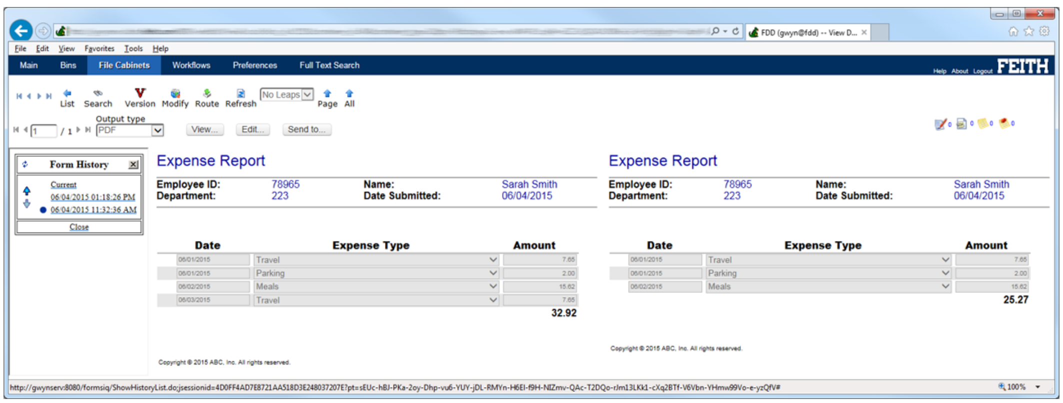


2. Click on the **Show History** link. The document is re-displayed in a three-pane window: The form history is listed on the left, the current form is displayed in the middle, and on the right is a blank pane.

   Note: If you do not have "Show History" permission for the form, the **Show History** link does not appear on the form page.



3. To view the document in a previous state, choose one of the datetime entries in the history list (you can also use the up and down arrows to move through the list). The selected, old version of the form is displayed in the right pane.



4. Close the history pane by either clicking **Close** or clicking the **X** in the upper right hand corner of the pane. The document is re-displayed in its current state.

Appendix

Appendix A: Optional Components

Optional components may be added to the basic FDD system to provide greater functionality. Some of these components require additional hardware.

For further information on any optional component, please contact your Feith Systems and Software, Inc., sales representative.

Autonomy IDOL	Offers a full text search alternative to structured file cabinets searches. WebFDD uses third-party text engine Autonomy IDOL.
Elasticsearch	Offers a full text search alternative to structured file cabinets searches. WebFDD uses third-party text engine Elasticsearch.
FDD Auditor	A performance measurement tool for FDD supervisors. FDD Auditor provides production statistics and performance data; it also shows backlogs, unbalanced workloads, and work queue aging.
FDD Client	The power client version of WebFDD. FDD users access FDD documents (including COLD pages, scanned images, and imported objects) through the application installed on their desktop.
FDD COLD	Eliminates microfilm/fiche by automatically indexing and storing computer generated documents directly onto magnetic or optical disk.
Feith Forms iQ	A web-based electronic forms solution. The Forms iQ Designer allows a designer to create web forms. Submitted forms are processed by the Forms iQ Server and stored as FDD documents.
Feith FPX	The export cartridge that exports all types of FDD files.
Feith Mail iQ	An email archiving solution, which gives you the power to store, monitor, retrieve, and archive your organization's email.
Feith MS Office Integration	Allows users to index MS Office documents into FDD from the desktop.
Feith VIP (Volume Image Processing)	A high-speed scanning solution. The Feith VIP bar code solution recognizes all industry standard bar code formats and uses the encoded information to index documents.
Feith Quick Integrator	Links WebFDD to terminal or Windows-based applications. You can use QI to index and view documents based on values located in the terminal/GUI window.
Feith UTR (Universal Text Recognition)	Extracts text and feeds it into the full text database. Documents are retrieved through a full text search.
Feith Vortex	Automates the handling of documents. Vortex searches directories for incoming files of given types and associates the files with given applications. Vortex can be run on a schedule to help load balance the network and servers.
Feith Workflow iQ	Allows a designer to create and manage workflows, processing FDD documents through a set of business rules.

Glossary

B

Batch: A temporary grouping of one or more pages. Batches reside in bins. A batch of pages is usually acquired into FDD as a group.

Bin: A temporary storage area for batches waiting to be indexed.

C

Check In: Part of the versioning process. Check In stores pages (or a GOS file) as a new version of a document.

Check Out: Part of the versioning process. Check Out opens a new version of a document for editing.

D

Distinct Values: A list of the distinct data values within a file cabinet field; can be used to select a value when indexing or searching. This list is only available if the file cabinet column is indexed. For more information, please see the FDD administrator.

Document: A permanent grouping of related pages. Documents reside in file cabinets. The pages in a document were indexed with the same indexing values.

F

File Cabinet: A permanent storage area for indexed documents. Each file cabinet is defined by the index fields (e.g., name, date, amount) it uses to organize stored images. Each entry in the file cabinet consists of a group of index field values (e.g., Joe Smith, 12/19/89, $140.43) and the images associated with those values.

Full Text Search: A search method used to find pages based on the text they contain. Can also locate pages based on text contained in keyed text page notes. An FDD system must include the optional UTR and Elasticsearch/Autonomy IDOL to support full text searches.

G

GOS: Generalized Object Storage. Any file stored in FDD that is not an FDD image or ASCII text.

Group: Groups of users who can be assigned specific tasks and functions.

I

Index: The process of permanently assigning a page to a file cabinet. Pages are indexed by entering file cabinet field values.

Integration Link: When retrieving workflow documents on a task with an integration link, the link will launch a Forms iQ form.

L

Lookup Table: A list of suggested index values; can be used when indexing or searching. The FDD administrator has the ability to create a lookup table and assign it to a file cabinet field.

M

Minipages: A display of all pages in a document in miniature.

O

Overlay: An image of a form (such as an invoice or purchase order) that is displayed "over" another FDD image (usually a text page) to give the impression that you are viewing a completed form. Overlays are often used with COLD documents.

P

Page: A single image or file that is stored in FDD. A page belongs to either a batch or a document.

Permissions: Privileges that are assigned at the user and/or group level to control both the functions a user can perform and the resources a user may access. There are four types of permissions: task permissions, resource permissions, database permissions and document permissions.

Preferences: User settings that control various options including image display size and warning messages.

R

Route: The process of moving a batch or a document into a bin.

S

Signature: A document note that contains information that identifies both the signer and the makeup of the document.

V

Versioning: The process of creating multiple versions of the same document. Allows users to modify a document while retaining a version of the document in its original state.

W

Workflow: The process of working FDD documents through a set of business rules. The FDD system must contain the optional product Workflow iQ to support workflow.

Index

Revision History

Date	Version	Author	Description
6/20/2016	9.2.1.6	GJG	Updated description of full text server.
12/15/2015	9.2.1.6	GJG	Minor updates.
6/16/2015	9.2.1.4	GJG	Updated documentation for this new version.