Feith Document Database Client
Version 9.2
User Guide

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Feith Systems and Software, Inc.
425 Maryland Drive
Fort Washington, PA 19034
Tel (215) 646-8000
Fax (215) 540-5495
www.feith.com

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Introduction

Welcome to FDD

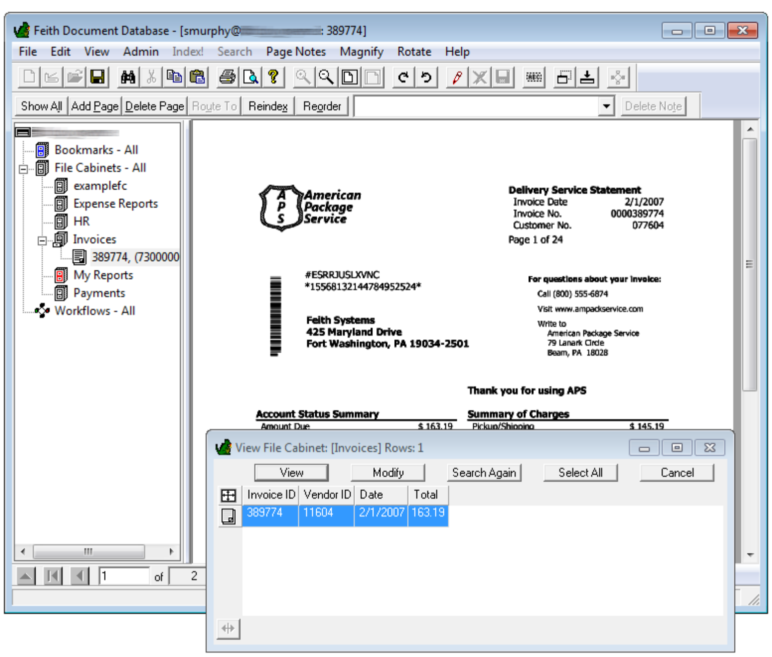
Feith Document Database (FDD) Client is the power client application for viewing and managing your documents in the FDD system. Scan or import your pages into FDD and then index the pages into documents in a file cabinet, entering key information that identifies each document. Find documents based on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

Get started:

- Acquire pages into FDD
- 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 FDD:

- **Support for Elasticsearch:** Elasticsearch is a third-party full text database, which FDD supports as an alternative to Autonomy IDOL. See Perform Full Text Search and ES Search Techniques for more information.
  - Elasticsearch supports "simple search" with "smart ranking" where FDD will perform a "google-style" search, returning documents that contain any of the words then ranking the documents intelligently so the most relevant documents are at the top. For example, if you search on a full name like "John James Smith", documents with his full name will be at the top and documents with "John Smith" or just "John" will be ranked lower.
  - Along with ES, we added **Try Harder** and **What Else You Got** buttons that you can use to ask FDD to do another "fuzzier" search to try and find the documents you need. See Try Harder and What Else for more information.
- **Unlock Workflow Documents:** If you are an administrator who has access to a workflow's admin file cabinet, you can unlock documents that are locked or on hold to make them available for workers again. To do this, select the documents then right-click and choose **Workflow>Unlock Workflow Documents**. See The Admin File Cabinet for more information.
- **Add Document to Any Workflow Task:** Manually add a document to a specific workflow task, instead of the document just going in at the very beginning of the workflow. This may be helpful if a document needs to get back to a specific step or person, without going through all the other steps to get there. See Add Document to a Workflow for more information.
- **Next Doc and Previous Doc Buttons:** While viewing a document, hit the **Next Document** or **Previous Document** buttons on the **Page Bar** to navigate up and down the list of documents. If you had viewed the full text hits when viewing the first document, the full text hits dialog will be reopened for you automatically when you view the next document. See View FDD Documents and Perform Full Text Search for more information.
- **Right-click>Copy, Cut, and Paste in Grid:** Under the file cabinet right-click menu, use **Cut**, **Copy**, and **Paste** options to move documents between bin and file cabinets. These options are alternatives to **Route** and **Reindex**, and may be especially helpful if you are managing pageless documents. Remember you can move documents on the **Folder Bar** as well. See Move Documents for more information.
- **Sort Batches:** Sort batches in a bin by priority, creation time, or name. See Manage Batches for more information.
- **Enable or Disable Distinct Values:** An administrator can choose whether end users can view the distinct values of a file cabinet field. The administrator may disable distinct values for performance reasons, or may enable it to help the user in entering values for a file cabinet field. This field option is configured in Feith Control Panel. See Distinct Values for more information.
- **Export Index Values to CSV:** Select rows in the file cabinet grid, right-click, then select **Export Selected Rows>Export Selected Row Data as a CSV file**. See Export Index Values for more information.
- **Convert Page from GOS to Native Format:** Convert a text or image GOS page to the native FDD format. See Convert Page from GOS for more information.
- **Copy Notes on Reindex:** When reindexing and creating new pages, turn on **Copy Notes to New Pages** to copy page notes over to the new page, such as redactions. See Reindex a Document for more information.

Frequently Asked Questions

I un-docked the Folder Bar and want to re-dock it to the side of the window?

Select **View>Dock All Toolbars**.

Scan and Import under File>Acquire are disabled?

Check the following:

- You must have the necessary task permission to scan or import. Check with your system administrator to ensure you have the permissions you need.
- You must have resource permission to at least one bin. Check with your system administrator to ensure you have the permissions you need.

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.

A field was added to a file cabinet in Feith Control Panel, but the field doesn't display in the file cabinet in FDD?

Check the **Column Preferences**, located in **right-click in file cabinet>Preferences>Column Preferences**. If the file cabinet has had any of its columns reordered or hidden, any new fields are automatically added as hidden fields. To fix this, go to Column Preferences and move the field from the **Hidden Columns** list to the **Displayed Columns** list. See Reorder and Hide Fields for more information.

Where is the full text search field on the bottom of my file cabinet?

To full text search in a specific file cabinet:

- Your FDD system must be configured for full text search.
- In a virtual file cabinet, full text searching must be allowed by an administrator. See Feith Control Panel User Guide for more information.
- In a standard file cabinet, full text indexing must be turned on by an administrator. See Feith Control Panel User Guide for more information.

The full text search results do not come back in the smart ranking I expect?

Check the following:

- The "simple search" with "smart ranking" is only supported for Elasticsearch. Autonomy IDOL has its own standard ranking that may or may not be as intelligent as ES's simple search. See ES Search Techniques for more information.
- If you sorted a column in the file cabinet, this will override ES's smart ranking. Turn off sorting and redo the search to get back documents in ES's smart rank order. See Sort Search Results for more information.
- If you included an operator or keyword in your query, Elasticsearch will do standard search with standard ranking, as opposed to the simple search with smart ranking. See ES Search Techniques for more information.
- Try adjusting the **Word Proximity** and **Boost** settings to tweak ES's simple search. See Perform Full Text Search for more information.

Where is the calendar pane in the Work To Do window?

The calendar pane in the Work To Do window is now hidden by default. To display it, select **View>Show Calendar** in the Work To Do window.

I am working with documents in a workflow and I see a dialog with a footprint animation. What are these feet?

The "feet" animation, seen in FDD when processing workflow documents, is related to the **Stay with Document** option. The Stay with Document option allows you to follow the document to its next location in the workflow. The footprint animation plays in a dialog labeled **Waiting for Document** as FDD waits for REX to process the workflow. You can turn off the Stay with Document feature in the Workflow Task Form by selecting **Settings>Stay with Document**. See Workflow Tasks 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 **Feith Workflow iQ Manager User Guide** for more information.

Can I unlock documents that were locked or put on hold by myself or other users?

Yes. If you are an administrator who has access to a workflow's admin file cabinet, you can unlock documents that are locked or on hold to make them available for workers again. To do this, select the documents then right-click and choose **Workflow>Unlock Workflow Documents**. See The Admin File Cabinet for more information.

I have the Change Password task permission, but get an error trying to change my password?

This is a known limitation for users with the "Feith Connect" database role on MS SQL Server. A user must have a database role of "Feith Connect With DB Owner" or "Database Admin" in order to change their password. The database role is set in Feith Control Panel. See the Feith Control Panel User Guide for more information.

Tips and Tricks

- Drag-and-and drop a file from your computer onto a bin, file cabinet, batch, or document on the folder bar in order to import it.
- Paste text or an image from the clipboard as a new page in a document.
- Prioritize batches and workflow documents so that the most important work gets done first. See Manage Batches and Change Document Priority for more information.
- Bookmark your favorite searches, pages, and index values to use or access them later. See Bookmark a Search, Bookmark a Page, and Bookmark Index Values for more information.
- Make searching easier by using wildcards, keywords, and more. For example, search for documents filed **this month**. 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.
- When viewing search results with lookup table values, it may be helpful to turn on color-coding or lookup value description tooltips. See Lookup Tables for more information.
- After sorting a column, you can hit a letter or number key on your keyboard to jump down in the list to the first row that begins with that letter or number. E.g. hit the "M" key to jump down to the results that start with "M." See Sort Search Results for more information.
- While viewing a document, hit the **Next Document** or **Previous Document** buttons on the **Page Bar** to navigate up and down the list of documents. See View FDD Documents for more information.
- Take advantage of keyboard shortcuts listed in Appendix A: Keyboard Shortcuts. For example, press **ALT**+**B** to hide the file cabinet grid from view (when viewing documents). Press **ALT+B** again to bring the file cabinet grid back to the front.
- Reorder and hide file cabinet fields the way you like. See Reorder and Hide Fields for more information.
- If you are an administrator who has access to a workflow's admin file cabinet, you can unlock documents that are locked or on hold to make them available for workers again. To do this, select the documents then right-click and choose **Workflow>Unlock Workflow Documents**. See The Admin File Cabinet for more information.
- After doing a full text search, you can view a document as usual but you can also view the full text hits by clicking the button. If you then navigate up and down the list of documents using the and buttons, the full text hits dialog will open for you automatically as you navigate to each document. See Perform Full Text Search and View FDD Documents for more information.
- When full text searching with Elasticsearch, use the **Try Harder** and **What Else You Got** buttons to ask FDD to do another "fuzzier" search to try and find the documents you need. See Try Harder and What Else for more information.
- When testing or troubleshooting your full text configuration, it is help to manually add data to the full text database from inside in FDD. See Full Text Search Overview for more information.
- Instead of using the Route or Reindex buttons, you can **Cut/Copy** and **Paste** batches or documents using the folder bar or file cabinet right-click context menu. See Move Documents for more information.
- Export index values to manipulate them in another program. See Export Index Values for more information.
- Index data from a CSV file as pageless documents in a file cabinet. See Index from CSV for more information.

Login

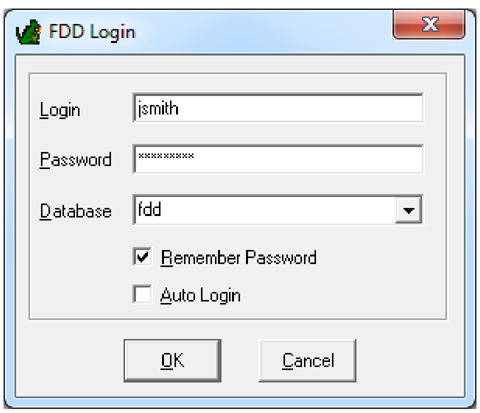
See the following for instructions:

- Login to FDD
- Turn Off Auto Login
- Single Sign-On

Login to FDD

To log in to FDD:

1. In your start menu programs list, select **FDD Client** under **Feith Systems**. The **FDD Login** dialog opens.
2. Enter your **Login** name.
3. Enter your **Password**.
4. Select or enter your **Database**. You can add your database connect string to the list be selecting ***EDIT SERVER LIST*** in the **Database** list.
5. Optionally select the following:
    - **Remember Password:** Turn this option on for FDD to remember your password and fill it in for you.
    - **Auto Login:** Turn this option on for FDD to remember all your login information and automatically login for you, skipping the login dialog.



6. Click **OK**. You are logged into FDD.

Notes:

- You may receive **Logon Messages** before being logged into FDD. These messages are configured by your administrator and contain information they want you to be aware of before using the system. You must answer **OK** to the message in order to proceed and login to FDD. Messages are configured in Feith Control Panel.
- If you are prompted to **Change Your Password** on login, your password has 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

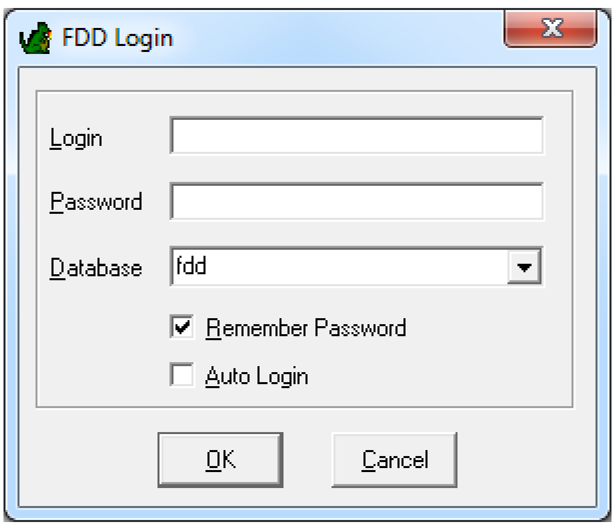
To turn off **Auto Login**:

1. In FDD, select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Misc.** tab.
3. Uncheck the **Auto-Login** option.
4. Click **OK**.

Single Sign-On

To login to FDD if your system is configured for Single Sign-On:

1. In your start menu programs list, select **FDD Client** under **Feith Systems**. The **FDD Login** dialog opens.
2. Leave the **Login** and **Password** field empty.
3. Select or enter your **Database**. You can add your database connect string to the list be selecting ***EDIT SERVER LIST*** in the **Database** list.
4. Optionally, turn on the **Auto Login** option and FDD will login for you automatically, skipping the login dialog.



5. Click **OK**. You are Single Signed-On to FDD.

The FDD Interface

The Menus

The menu bar is located at the top of the FDD window. It contains the following menus: File, Edit, View, Admin, Index!, Search, Note, Magnify, Rotate and Help.

File Menu

MENU OPTION	ACTION
Open	Opens an .frl file (FDD URL) in FDD. Also activated by pressing **CTRL+O**.
New Image Window	Opens the displayed document in a new image window ("pop-up" window). Also activated by pressing **CTRL+N**. See View Document in New Image Window for more information.
Print Preview	Displays a print preview of the open document.
Print	Opens the **Print** window so you can print the open document. Also activated by pressing **CTRL+P**.
Send	Allows you to send an e-mail message. Choose one of the following options: • **Page:** E-mails the displayed page as an attachment. • **Document:** E-mails the open document as an attachment. WARNING: There is no size limitation to this feature. • **Page URL:** E-mails a WebFDD URL. The URL is a View URL for the displayed page. • **Document URL:** E-mails a WebFDD URL. The URL is a View URL for the open document. • **Page FRL File:** E-mails an .frl (FDD URL) of the open page. • **Document FRL File:** E-mails an .frl (FDD URL) of the open document. • **Search FRL File:** E-mails an .frl (FDD URL) of the last used file cabinet search criteria. This option is only enabled when viewing the results of a file cabinet search. See E-mail from FDD for more information.
Acquire	Allows you to acquire a page or batch of pages. Choose one of the three acquisition methods: • **Scan:** Opens the **Twain Scan** window so you can scan pages into FDD. See Introduction to Scanning and Importing for more information. • **Import:** Opens the **Import Main** window so you can import pages into FDD. See Import Pages for more information.
Select Twain Source	Opens the **Select Source** dialog so you can choose the scanner you want to use.

Export	Allows you to export a page or document. Choose of the following options: • **Export Page:** Exports a selected range of pages from the open document. See Export Pages for more information. • **Export Document:** Exports the entire open document. See Export Documents for more information.
Move Local Images	Allows you to move images stored on the local disk to a storage server.
Cache Setup	Allows you to setup local cache on your workstation. Setting up local cache allows you to retrieve frequently accessed images more quickly.
Log Setup	Allows you to set up an FDD log to record errors.
MRU (Most Recently Used) List	Lists the four most recently viewed or indexed documents. Selecting a document from this list retrieves and displays the document.
Reconnect	Closes FDD and launches the FDD Login dialog so you can reconnect to the database. (Useful for re-establishing a dropped database connection. Also useful for switching user connection or logging into another database.)
Exit	Closes the FDD application and logs you out of the FDD database.

Edit Menu

MENU OPTION	ACTION
Select All	Selects all text on the open page. Also activated by pressing **CTRL + A.**
Copy	Copies highlighted text to the clipboard. Also activated by pressing **CTRL+C**.
Paste	Pastes text copied to the clipboard into the existing document as a new page. Also activated by pressing **CTRL+V**.
Find	Opens the **Find** window so you can search for letters and words in a text document. Also activated by pressing **CTRL+F**.
Add Document Section	Adds a document section. See Document Sections for more information.
Remove Section Tab	Removes a document section. See Document Sections for more information.
Convert GOS Page to Native	Convert a text or image General Object to the native FDD format so that you can do more with the page, such as redacting. See Convert Page from GOS for more information.

View Menu

MENU OPTION	ACTION
Refresh	Refreshes the FDD window. Also activated by pressing **F5**.
Toolbar	Toggles the display of the toolbar.
Status Bar	Toggles the display of the status bar.
Page Control Bar	Toggles the display of the page control bar.
Signature Control Bar	Toggles the display of the signature control bar. See Sign a Document for more information.
Redact Zones Control Bar	Toggles the display of the redact zones control bar. See Redaction Notes for more information.
Graphic Stamp Bar	Enables the Graphic Stamp Toolbar, which is designed to make accessing, applying and saving stamps easier and faster.
Note Bar	Toggles the display of the note bar.
Page Bar	Toggles the display of the page bar.
Folder Bar	Toggles the display of the folder bar.
Blog Bar	Toggles the display of the blog bar. See Blog Bar for more information.
My Bookmarks	Opens the **My Bookmarks** window so you can access your View, Search and Index bookmarks. See the following topics for more information: Bookmark Index Values, Bookmark a Search, and Bookmark a Page.
Note on Left	Switches the note list from the right to the left side of the page control bar.
Dock All Toolbars	Docks all displayed toolbars.
Hide/Show Search Grid	Hides the file cabinet search grid. Also activated by pressing **ALT+B**.
Shrink/Enlarge Search Grid	Shrinks or enlarges the file cabinet search grid.
Full Menus	Re-enables menus after FDD displays an image through DDE.
Overlay	Toggles the display of overlays. See Overlays for more information.
Green Bar	Toggles the display of green bar on documents.
Zoom	Opens the **Zoom** sub-menu.

Admin Menu

MENU OPTION	ACTION
Admin Tasks	Opens the **Admin Tasks** sub-menu. The task options perform miscellaneous administrative tasks: • **Commit:** Moves images from magnetic storage to optical disk. • **Selective Commit:** Moves selected images from magnetic storage to optical disk. • **Unlock Batches:** Allows you to unlock locked batches. Batches can accidentally be left in a locked state if a user's computer is shut down while s/he is viewing or indexing the images. • **Unlock Approvals:** Allows you to unlock locked approval notes. • **Selective Delete** sub-menu includes the following task options: ○ **Delete Documents:** Deletes documents or folders from a file cabinet. If the deleted item is a folder, the underlying documents and folders will not be deleted. ○ **Purge Documents:** Deletes all documents and folders within a folder. Example: Folder A exists in file cabinet A and document B exists in file cabinet B. Folder A contains document B. If folder A is deleted, document B will be deleted as well. ○ **Purge Page:** Deletes displayed page from all documents in which it exists.
Change Password	Allows you to change your user password. See Change Your Password for more information.
Personal Stamp	Allows you to import or "grab" the graphics to use as your personal stamps. See Personal Stamps for more information.
User Status	Displays your user status, including your user name, group membership and permission assignments. See View User Status for more information.
Update Permissions	Updates your permissions if they have changed while you have been logged in to FDD. See Update Permissions for more information.
Adjust Overlays	Opens the **Adjust Overlays** window so you can change the font properties of text pages associated with an overlay. You can also change the display color of the overlay. See Adjust Overlay for more information.
Preferences	Opens the **Preferences** dialog window so you can change your user settings.

Index! Menu

MENU OPTION	ACTION
Index!	Opens the **Index a Batch** dialog so you can index batches into file cabinets.

Search Menu

MENU OPTION	ACTION
File Cabinets	Opens the **Select File Cabinet to View** window so you can open a file cabinet for searching. See Introduction to Searching for more information.
Full Text	Opens the **Full Text Search** window so you can full text search within FDD documents. See Perform Full Text Search for more information. This feature is only available if your system is configured with a full text database. See Optional Components for more information.
Approvals	Opens the **Approvals** window so you can search for open approval requests.
Work to Do	Opens the **Work to Do** window so you can search for available work. Only available if you have Workflow iQ. See Optional Components for information on Workflow iQ.

Page Notes Menu

MENU OPTION	ACTION
Graphic	Opens the **Graphic Note** window so you can create a graphic page note. See Graphic Notes for more information.
Text	Opens the **Text Note** window so you can create a text page note. See Text Notes for more information.
Approval	Opens the **Approval Note** window so you can create an approval page note. See Approval Notes for more information.
Highlight	Opens the **Highlight Note** window so you can create a highlight page note. See Highlight Notes for more information.
Redact	Opens the **Redaction Note** window so you can create a redaction page note. See Redaction Notes for more information.
Stamp	Opens the **Stamp Note** window so you can create an image stamp or a text stamp.
Personal Stamp	Opens the **Personal Stamp** window so you can stamp a graphic of your full name or your initials on the page.

Magnify Menu

MENU OPTION	ACTION
Magnify	Opens the **Magnifier** window. Use the **Magnifier** to enlarge sections of the page.

Rotate Menu

MENU OPTION	ACTION
Rotate Page	Rotates the displayed page. Options include: • **90° Right:** Rotates ninety degrees to the right. • **180° Flip:** Rotates one hundred and eighty degrees. • **90° Left:** Rotates ninety degrees to the left.
Rotate Document	Rotates all image pages in the displayed document. Options include: • **90° Right:** Rotates ninety degrees to the right. • **180° Flip:** Rotates one hundred and eighty degrees. • **90° Left:** Rotates ninety degrees to the left.

Help Menu

MENU OPTION	ACTION
FDD Help	Opens the **Feith Document Database Help**. Also activated by pressing **F1**.
What's New	Opens the What's New in FDD? section in the **Feith Document Database Help**.
About FDD	Opens the **About** dialog window. This window shows various information, including the FDD version number, copyright date, FDD Schema version number of the connected database, and user status (see View User Status for more information on user status).

Disabled Options

You may notice that some menu options are disabled, or "grayed out." A disabled option is not available for use. Menu items might be disabled because:

- The FDD administrator has restricted you from performing a particular task.

  For example, the **Change Password** option is disabled if you are not allowed to change your password.

- FDD is in a state that prevents you from selecting an option.

  For example, the **Rotate** menu is disabled when there is no image on the screen to rotate.

- The option pertains to an optional FDD component that you do not have.

  For example, the **Full Text Search** option is disabled if you do not have UTR and Elasticsearch/Autonomy IDOL.

The Toolbars

There are several toolbars that can be used when working in FDD. Each toolbar is listed under the **View** menu; toolbar display is toggled on or off by checking or un-checking the menu item.

All displayed toolbars can be docked by selecting **View>Dock All Toolbars**.

Toolbar: Use the standard toolbar buttons as shortcuts to frequently used menu items.

Status Bar: Read the status bar for a description of a highlighted menu option or a current FDD operation.

Page Control Bar: Use the page control buttons to manage the pages of an open document.

Signature Control Bar: Use the signature control buttons to sign the open document.

Redact Zones Control Bar: Use the redact zones control buttons to redact rectangular or polygonal areas on a page.

Graphic Stamp Bar: Use the Graphic Stamp Bar to access, apply, and save stamps on a page.

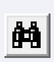
Note Bar: Use the note bar to view all document and page notes associated with the open document.

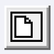
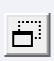
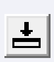
Page Bar: Use the page bar to select a page in the open document.

Folder Bar: Use the folder bar to access bins, file cabinets, and workflow tasks from a tree view.

Blog Bar: Use the blog bar to create and manage document text notes.

Toolbar

BUTTON	ACTION
	Opens the **Import Main** dialog window so you can import pages into FDD.
	Opens the **Scan** dialog.
	Opens the **Select File Cabinet to View** window so you can search for FDD documents.
	Exports the open document.
	Opens the **Find** dialog window so you can search for letters and words in a text document.
	Copies highlighted text to the clipboard.
	Pastes text from the clipboard into the existing document as a new page.
	Opens the **Print** dialog window so you can print the open document.
	Displays a print preview of the open document.
	Opens the **About** dialog window to display version number, copyright date and user status.

	Enlarges the open page so that it appears larger.
	Shrinks the open page so that it appears smaller.
	Shrinks or enlarges the open page to fit in the view window vertically.
	Shrinks or enlarges the open page to fit in the view window horizontally.
	Rotates the open page 90° clockwise. (Images only.)
	Rotates the open page 90° counterclockwise. (Images only.)
	Changes the cursor to a note tool so you can create a graphic note.
	Cancels a graphic note.
	Saves a graphic note.
	Turns on/off Highlight Mode.
	Hides or shows the file cabinet grid.
	Shrinks or enlarges the file cabinet grid.
	Opens the Workflow Work To Do Interface.

Status Bar

The status bar is located at the bottom of the FDD window. As you mouse over the menu and toolbar options, a description displays on the status bar.

The status bar also provides information as operations occur; for example, the message "Getting batches" displays when you open a bin.

Page Control Bar

BUTTON	ACTION
Show All	Opens the selected document in minipages. See Minipages for more information.
Add Page	Adds a page to the document.
Delete Page	Deletes the open page from the document.
Route To	Opens the **Route To** dialog so you can route selected pages to a bin.
Reindex	Opens the **Index Into Another File Cabinet** dialog so you can reindex selected pages into another file cabinet.
Reorder	Opens the **Reorder** dialog so you can change the page order of the open document.
Delete Note	Deletes the selected note (in the note list) from the page.

The page control bar also contains the **note list**. This note list is located on the right of the page control bar and displays all notes attached to the open page. You can move the note list to the left side of the page control bar by selecting **Note on Left** from the **View** menu.

Signature Control Bar

BUTTON	ACTION
	Changes the cursor to a stamp tool so you can place your initials on the open page.
	Changes the cursor to a stamp tool so you can place your full name on the open page (this action signs the open document).
	Deletes the selected signature (in the signature list) from the document.
	Verifies the selected signature (in the signature list).

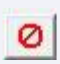
The signature control bar also contains the **signature list**. The signature list is located on the right of the signature control bar and displays all signatures attached to the open document.

Redact Zones Control Bar

BUTTON	ACTION
	Changes the cursor to a redaction tool so you can redact a rectangular area on the page.
	Changes the cursor to a redaction tool so you can redact a polygonal area on the page.
	Saves the current redactions as a redaction note.
	Cancels the current redactions and removes them from the page.

The redact zones control bar also contains the **redaction note list**. The redaction note list is located on the right of the redact zones control bar and displays all redaction notes applied to the open document.

Graphic Stamp Bar

BUTTON	ACTION
	Changes the cursor to a stamp tool so you can apply stamps to the page.
	Saves the current stamp as a graphic note.
	Cancels the current stamps and removes them from the page.

Note Bar

The note bar shows all document and page notes associated with the open document. An **All Notes** dialog can be opened from the note bar, listing all notes for the document. When viewing a multiple page document, the **All Notes** dialog allows you to access all notes associated with the document from any page.

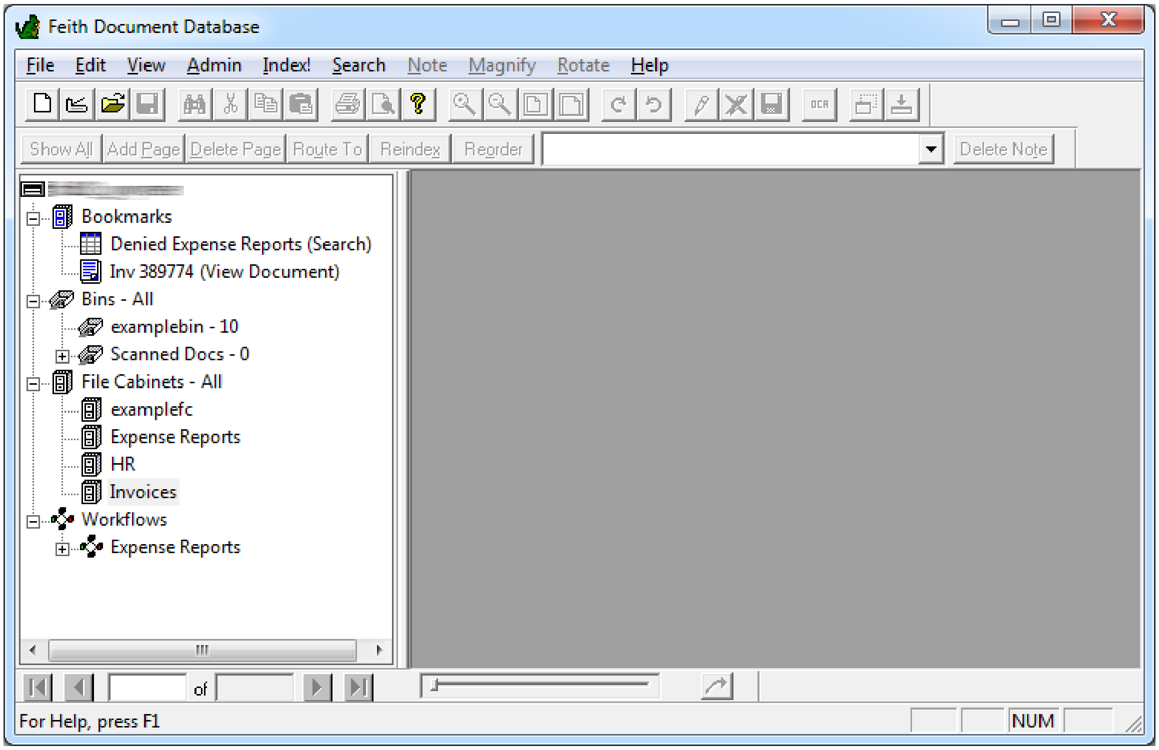
See View All Notes for more information.

Page Bar

On the page bar you can navigate pages in a document or documents in the search results list. See Select a Page and View FDD Documents for more information.

Folder Bar

The folder bar shows bookmarks, bins, file cabinets, and workflow tasks in a tree view.



You can create "favorites" lists for bins and file cabinets on the folder bar.

To add a bin to your favorites list:

- Right-click on a bin and select **Add to Favorites**.

To remove a bin from your favorites list:

- Right-click on a bin and select **Remove from Favorites**.

To show the favorite bins list:

- Right-click on the **Bins** node and select **Show Favorites**.

To show all bins:

- Right-click on the **Bins** node and select **Show All**.

To add a file cabinet to your favorites list:

- Right-click on a file cabinet and select **Add to Favorites**.

To remove a file cabinet from your favorites list:

- Right-click on a file cabinet and select **Remove from Favorites**.

To show the favorite file cabinets list:

- Right-click on the **File Cabinets** node and select **Show Favorites**.

  The Select File Cabinet to View file cabinet list mirrors the preference (**Favorites** or **All**) selected on the folder bar. See Search for Documents for more information on the Select File Cabinet to View list.

To show all file cabinets:

- Right-click on the **File Cabinets** node and select **Show All**.

  The Select File Cabinet to View file cabinet list mirrors the preference (**Favorites** or **All**) selected on the folder bar. See Search for Documents for more information on the Select File Cabinet to View list.

To add a workflow or task to your favorites:

- Right-click on the workflow or workflow task and select **Add to Favorites**.

To remove a workflow or task from your favorites:

- Right-click on the workflow or workflow task and select **Remove from Favorites**.

To show the favorite workflows or workflow tasks:

- Right-click on the **Workflows** node and select **Show Favorites**.

To show all workflows and tasks:

- Right-click on the **Workflows** node and select **Show All**.

To add a bookmark to your favorites:

- Right-click on a bookmark and select **Add to Favorites**.

To remove a bookmark from your favorites:

- Right-click on a bookmark and select **Remove from Favorites**.

To show the favorite bookmarks list:

- Right-click on the **Bookmarks** node and select **Show Favorites**.

To show all bookmarks:

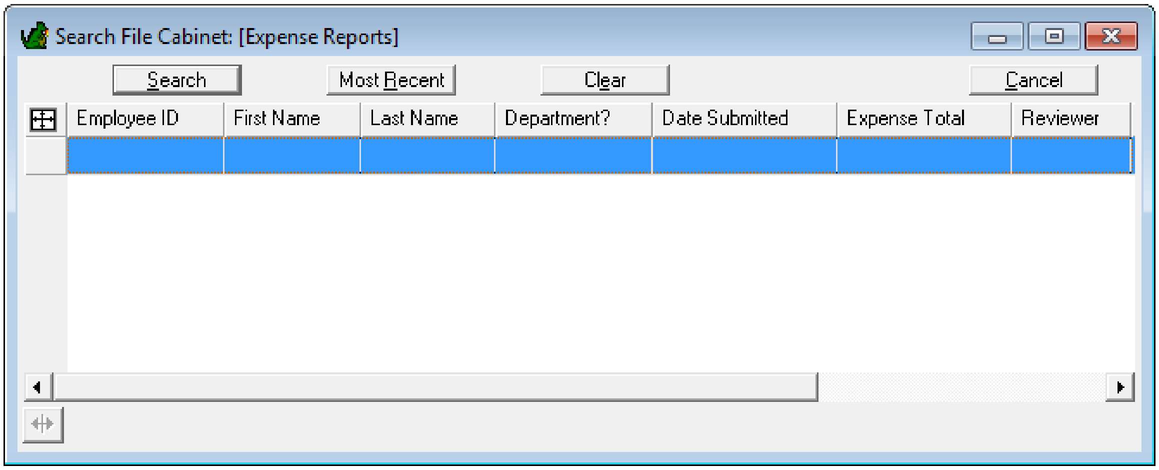
- Right-click on the **Bookmarks** node and select **Show All**.

Blog Bar

The blog bar displays document text notes in a "blog" fashion, arranged in chronological order from newest at the top to oldest at the bottom. Each note has the name of the user that created it as well as a timestamp indicating when the note was created. You can create and delete document text notes on the blog bar. See Blog Bar for more information.

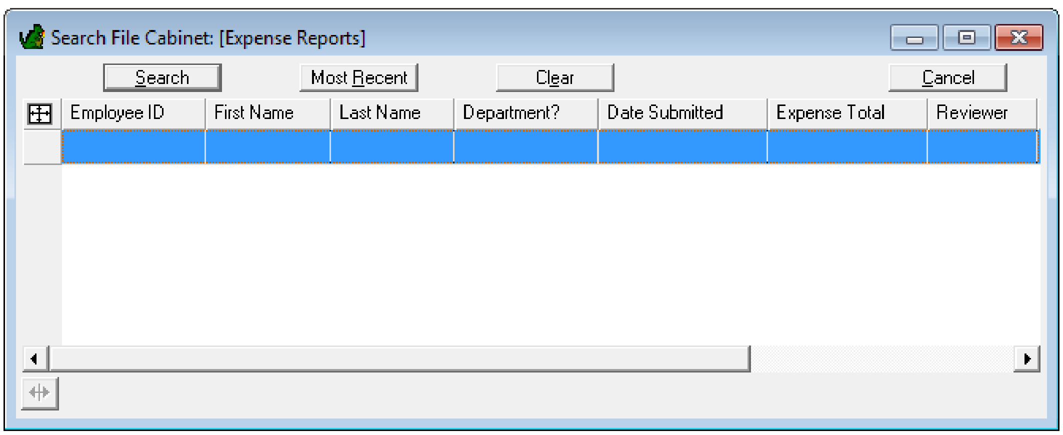
The File Cabinet Grid

Use the file cabinet grid to index pages and search for documents. When you retrieve a document, the index values are listed in a row in the grid:



To open the file cabinet grid:

1. From the **Search** menu, select **File Cabinets**. The **Select File Cabinet to View** dialog window opens.
2. Select a file cabinet.
3. Click **OK**. The file cabinet grid opens.



To open the grid from the folder bar:

- Double-click on the file cabinet OR right-click on the file cabinet and select **Open**.

To re-size the grid:

1. Drag the corner of the window with the mouse to the desired size.
2. Right-click on the grid and select **Save Preferences** to save the settings.

To re-size the index fields:

1. Hold the mouse pointer over the line between two field headings. The pointer should become a double-ended arrow.
2. Click and hold the left mouse button while dragging the field to make it bigger or smaller. Double-click between two fields for a "best-fit" size.

   You can also click the  icon to cycle through three different auto-fit options:

   - **Data:** Adjusts fields to width of data.
   - **Header:** Adjusts fields to width of field header label.
   - **Best:** Adjusts fields to width of data or field header label, whichever is longer.
   - Turn on the **Automatic Best Fit** preference (right-click on grid then select **Preferences>Automatic Best Fit**) to have the file cabinet remember the last selected auto-fit option.
3. Right-click on the grid and select **Preferences>Save Preferences** to save the settings.

To reorder and hide index fields:

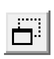
1. Right-click in the file cabinet grid and select **Preferences>Column Preferences**.
2. In the **Column Preferences** dialog, reorder and hide columns as desired.

   See Reorder and Hide Fields for more information.
3. Click **OK**. Your index field column preferences are saved.

To move the grid:

1. Click on the grid's title bar.
2. Hold down the left mouse button and drag the grid to the desired position on the screen.
3. Right-click on the grid and select **Save Preferences** to save the settings.

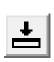
To hide the grid:

- Click the  button or use the keyboard shortcut **ALT+B**.

  Use the same process to bring the grid back.

  Additionally, you can set the grid to automatically hide when you view a document by turning on the **Auto Hide Grid** preference in the file cabinet right-click context menu.

To shrink the grid:

- Click the  button or use the keyboard shortcut **ALT+N**.

  Use the same process, or click **Search Again**, to move the grid back.

  Additionally, you can set the grid to automatically shrink when you view a document by turning on the **Auto Shrink Grid** preference in the file cabinet right-click context menu.

The File Cabinet Grid Right-click Context Menu

Right-click on the file cabinet grid to open the file cabinet grid context menu.

OPTION	ACTION
Preferences	Check any of the following options to modify the file cabinet preferences: **Save Preferences:** Saves the current size and position of the file cabinet grid. **Open Document in New Window:** Opens the document in a new window when you click **View**. **Auto Shrink Grid:** Automatically shrinks the grid when you view a document. To move the grid back, click the  button, use the keyboard shortcut **ALT+N**, or click **Search Again**. **Auto Hide Grid:** Automatically hides the grid when you view a document. To bring the grid back, click the  button or use the keyboard shortcut **ALT+B**. **Automatic Best Fit:** Upon performing a search, the file cabinet fields are automatically adjusted to the last selected auto-fit option (chosen by clicking the  icon). See Re-size the Index Fields for more information. **Auto Show RMA Properties:** Opens the RMA Properties dialog when you view a document. **Documents Only:** Searches will only return documents. **Folders Only:** Searches will only return folders. **Document Preview:** Enables mouse-over of the document icon in the file cabinet grid, which displays a preview of the document. **Display Last Page:** Displays documents starting at the last page. **Set Starting Page:** Displays document starting at the specified page number. Note that if the displayed document has fewer pages than the start page number, it is opened at the last page. **Change Font:** Opens the **Font** window so you can change the font of the text in the grid. **Column Preferences:** Opens the **Columns Preferences** dialog so you can reorder and/or hide columns in the file cabinet grid.
Index New	Choose either **Scan** or **Import Files** to index a new document. See Acquire Pages into a File Cabinet for instructions. Choose **Document (Empty)** to index a new pageless document. Choose **Documents(Empty) from CSV file** to index values from a CSV file. See Index from CSV for more information. Choose **Folder (Empty)** to index a new folder. See Folders for instructions. Choose **Dynamic Folder** to index a new dynamic folder. See Dynamic Folders for more information.
Add Page	Choose **Scan**, **Import Files**, **Import File as Section**, or **Paste Page** to add a new page to the selected document. See Acquire Pages into a File Cabinet for instructions.
New Bookmark	Choose either **This Search** or **Index Values** to create a bookmark. See Bookmark a Search or Bookmark Index Values for instructions.

Properties	Opens the **Properties** dialog; shows the title and ID of the document. Also shows the document level permissions.
Add to a Collection	Opens the **Add to a Collection** dialog where you can create a new collection or select an existing collection.
RMA Properties	Launches RMA iQ Workplace in the default browser.
Document Audit	Opens the **Document History** grid to show all tracked actions that have been performed on the selected document. Only available if auditing has been turned on by the administrator (requires FDD Auditor).
Leaps	Opens a sub-menu with the following choices: **Predefined Leaps:** Opens the **Predefined Leaps** window and lists predefined leaps. There are five types of leaps: **Application Leap**, **File Cabinet Leap**, **OCR Leap**, **SQL Leap**, and **URL Leap**. **Dynamic Leaps:** Performs a dynamic leap. **Document Leaps:** Performs a document leap. **Where Is It:** Opens the **Where Else Is It** dialog, which displays the document's additional locations. You will see an entry here, for example, if the document is in a workflow task or another file cabinet. See Leaps for more information.
Dial	Opens a third-party calling application to dial the phone number that was right-clicked in the file cabinet grid.
Paste Special	Contains the **Dial** option, which opens a third-party calling application to dial the phone number that was copied to the clipboard.
Cross File Cabinet	Choose **Search File Cabinets** to perform a search in other file cabinets with the entered search criteria. Choose **Close File Cabinets** to close the file cabinets that were opened during the **Search File Cabinets** search. See Search for Documents for more information.
Advanced Search	Opens the **Advanced Search** dialog. See Advanced Search for more information.
Workflow	Choose **Add to Workflow** to add the selected document to the start task of a workflow. Only available in workflow base file cabinets. Choose **Add to Workflow Task** to add the selected document to a specific task in a workflow. Only available in workflow base file cabinets. Choose **Withdraw from Workflow** to withdraw the selected document from a workflow. Only available in workflow base file cabinets and workflow admin file cabinets. Choose **Ad Hoc Route** to ad hoc route the selected document from its current workflow task to another workflow task. Only available in workflow admin file cabinets. Choose **Where Is It** to display information on where the document is in the workflow(s). Choose **Workflow History** to display the workflow history of the selected document. Only available in workflow base file cabinets and workflow admin file cabinets.

Version Control	Opens the version tree. See Document Versioning for instructions.
Document Notes	Opens the **Document History Note** grid, displaying all document notes for the selected document.
New Document Note	Opens the **Document History Note** dialog so you can add a new note to the selected document.
Full Text	Choose **View Hits** to view the document's full text content. (Note that this feature is only available after performing a full text search.) Choose **Add** to add the document to the **Autonomy IDOL** full text database. Choose **Delete** to delete the document from the **Autonomy IDOL** full text database. See Full Text Search Overview for more information.
Lookup	Opens a lookup table. See Index with Lookup Tables and Search with Lookup Tables for instructions.
Distinct Values	Opens a distinct values list. See Index with Distinct Values and Search with Distinct Values for instructions.
Last Indexes	Populates the grid with the last used index values. Only available during indexing.
Cut	Cut the selected documents in order to paste their pages to another document or file cabinet. See Move Documents for more information.
Copy	Copy the document or its data: • **Copy Selected Documents:** Copy the pages of the selected documents to the clipboard so you can paste them to another document or file cabinet. See Move Documents for more information. • **Copy Selected Row Data** or **Copy Selected Row Data with Labels** or **Copy All Row Data with Labels:** Copy the index values to the clipboard in tab-delimited format. See Export Index Values for more information. • **HTML Export:** Open an HTML report of the index values of all rows currently listed in the file cabinet grid. • **Copy Document ID:** Copy the internal FDD document ID to the clipboard.
Paste to this Document/Folder	Paste the pages cut or copied to the clipboard onto the selected document. See Move Documents for more information.
Paste as New Document	Paste the pages cut or copied to the clipboard as a new document in the file cabinet. See Move Documents for more information.
Export Selected Rows	Export the document or its data: • **PDF file per document** or **PDF as a single file:** Export one or more documents in PDF format. See Export Documents for more information. This option requires WebFDD. In addition, this option cannot be used to export GOS pages or a document with redacted pages. • **Selected Row Data as a CSV file:** Export index values of the selected documents to a CSV file. See Export Index Values for more information.
Delete Selected Rows	Deletes the selected documents.

Remove Selected Rows	Removes the selected documents from the folder. See Folders for more information.
Fill Column in Selected Rows	Fills an entire column with a single value in selected rows. **CTRL+click** or **Shift+click** can be used to select multiple rows.
Send Mail To	Opens a new e-mail message in your default mail client. The selected file cabinet field value is filled into the **To:** field of the message, a WebFDD URL to the document is included in the body of the message, and an FRL to the document is attached to the message.

The View Window

When viewing a document in FDD, the FDD view window context menu can be opened by right-clicking on the displayed page. On some pages you need to hold down the **CTRL** key when you right-click in order to bring up the FDD view window context menu (e.g. Forms iQ pages, HTML pages, XML pages, etc).

The view window context menu includes options to adjust the zoom percentage and to toggle the display of overlays.

OPTION	ACTION
Image Information	Displays the **Image Information** window when an image is viewed in FDD. This information may be useful to system administrators when troubleshooting problems.
Page Audit	Opens the **Page History** grid to show all tracked actions that have been performed on the selected page. Only available if auditing has been turned on by the administrator in the FDD Auditor application.
Open Page in Application	Opens the **Open Page for Editing** dialog.
Save Page to FDD	Opens the **Save New Page** dialog.
Green Bar	Displays green bar on the displayed document. Like green bar paper, it enhances readability of the document. The green bar only displays on text pages and monochromatic image pages.
Overlay	Turns off or on overlay display. This option is available only if an overlay is assigned to the image being viewed. See Overlays for more information.
Fit Horizontally	The image remains fixed in the vertical direction, but stretches or shrinks horizontally to fit the shape of the view window.
Fit Vertically	The image remains fixed in the horizontal direction, but stretches or shrinks vertically as needed.
Fit Frame	The image stretches or shrinks as needed to fit the FDD view window frame. This option may be useful when viewing a document that contains pages of assorted sizes.
Zoom 400%	Displays the image at 4 times the actual resolution.
Zoom 200%	Displays the image at 2 times the actual resolution.
Zoom 100%	Displays the image at the scanned resolution.
Zoom 50%	Displays the image at half of the original resolution.
Zoom 25%	Displays the image at a quarter of the original resolution.
Dot for Dot	Displays the image at the monitor resolution.
Custom	Displays the image at a size you choose.
Rotate Page	Options to rotate the page 90 degrees right/left or 180 degrees.

Sticky Page Notes	This option opens a sub-menu used for created positional notes. See Introduction to Page Notes for an overview of notes; see Sticky Page Notes for instructions.
Redactions	This option opens a sub-menu to remove redacted areas or edit redaction properties. See Introduction to Page Notes for an overview of notes; see Redaction Notes for instructions.
New Bookmark	Bookmarks the displayed image. See Bookmark a Page for instructions.
Copy	Copies selected text to clipboard. (To select text, highlight the desired region using the left mouse button.) Text can also be copied by pressing CTRL+C while highlighting a region of text.

Lookup Tables

Use lookup tables to select a file cabinet field value from a list when indexing, searching, and modifying in a file cabinet or searching and modifying in a workflow task. A lookup table is a list of suggested file cabinet field values created by your administrator in Feith Control Panel. A field as a lookup table if there is a question mark "?" after the field name in the file cabinet grid.

Note: Your administrator may require you to choose a value from the lookup table or you may be allowed to enter a value that is not in the lookup table.

See the following for instructions:

- Choose Lookup Table Style
- Select Value with Plain Style
- Select Value with Dropdown Style
- Select Value with Radio Style
- Color Code Lookup Values in Grid
- Show the Lookup Value Description in the Grid

Choose Lookup Table Style

Lookup tables can be displayed in one of three edit styles: **Plain**, **Dropdown**, or **Radio**.

To choose your preferred lookup table style:

1. In the file cabinet grid, right-click on the field header of the field with the lookup. You know it has a lookup if there is a question mark "?" after the field name. The **Field Look Up** dialog displays.
2. In the **Edit Style** section, choose the desired edit style:
   - **Plain:** Lookup values are selected in the **Field Look Up** dialog. This style may be desirable when the lookup table has many values (e.g. more than 500) or if the lookup table has two columns (e.g. department code and department name). See Select Value with Plain Style for more information.
   - **Dropdown:** Lookup values are selected in a drop-down list. This style may be desirable when doing a large amount of data entry. See Select Value with Dropdown Style for more information.
   - **Radio:** Lookup values are selected from a set of radio buttons. This style is only available if the lookup table has three or fewer values and is desirable if you want to see all possible values in addition to the selected value. See Select Value with Radio Style for more information.
3. Click **OK**. The **Field Look Up** dialog closes.
4. Close and re-open the file cabinet to see the changed edit style.

Note: For list fields, only the **Plain** style is supported.

Select Value with Plain Style

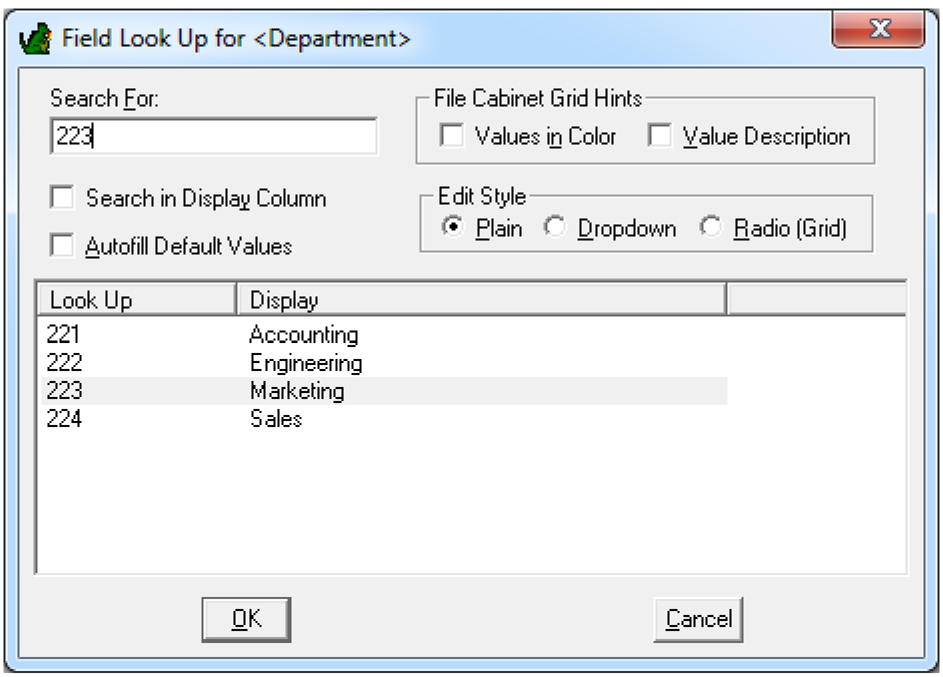
Using the **Plain** style, lookup values are selected in the **Field Look Up** dialog. This style may be desirable when the lookup table has many values (e.g. more than 500) or if the lookup table has two columns (e.g. department code and department name). This style is available in file cabinet grids, index forms, and workflow forms, and this style is always available in those locations as an alternative if you choose the **Dropdown** or **Radio** style.

To select a value using a lookup table in the **Plain** style:

1. Begin indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.
2. In the file cabinet grid, right-click the file cabinet field header (e.g. Department?). The **Field Look Up** dialog opens.

   If you are using the workflow task form or indexing form, click the question mark icon next to the field name (e.g. Department: ?). The **Field Look Up** dialog opens.
3. Scroll through the lookup table list by typing into the **Search For** field. As you type, the lookup list automatically scrolls to the matching entries.

   If the lookup table has two columns, you can search the display column be checking the **Search in Display Column** option. You may want to sort the display column, by clicking on the column header, prior to searching.



4. Select a value from the list.

   Note: If the field is a list field, you can select multiple values from the list using **CTRL+click** or **SHIFT+click**.
5. Click **OK**. The selected value is filled into the field.
6. Continue indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.

Select Value with Dropdown Style

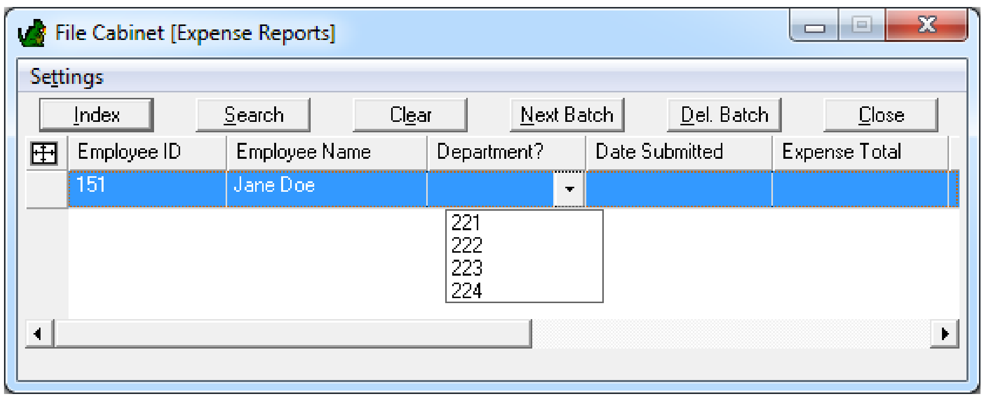
Using the **Dropdown** style, lookup values are selected in a drop-down list. This style may be desirable when doing a large amount of data entry. This style is available in file cabinet grids, index forms, and workflow forms.

To select a value using a lookup table in the **Dropdown** style:

1. Begin indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.
2. In the file cabinet grid, select a value from the lookup table drop-down list. The selected value is filled into the field.

   You can also open the lookup table drop-down list by giving focus to the field and pressing **CTRL + the down arrow key**. Within the drop-down lookup list, the following keyboard shortcuts are supported:

   - **Down arrow key**: Moves focus down in the drop-down lookup list.
   - **Up arrow key**: Moves focus up in the drop-down lookup list.
   - **ENTER**: Populates the field with the selected value.
   - **ESC**: Closes the drop-down lookup list.

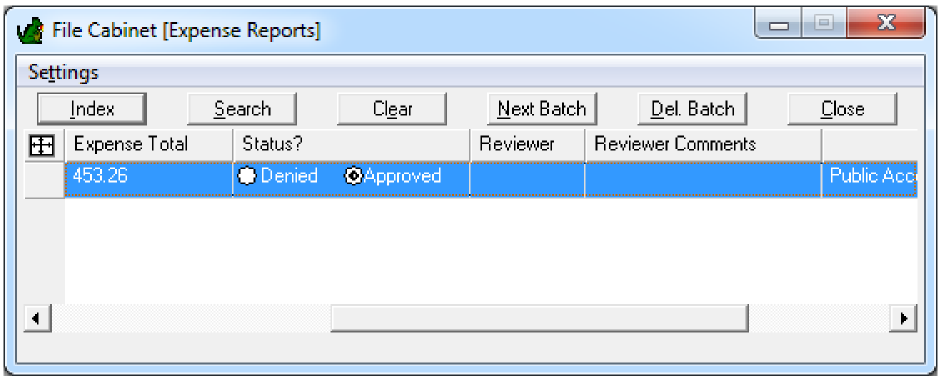
3. Continue indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.

Select Value with Radio Style

Using the **Radio** style, lookup values are selected from a set of radio buttons. This style is only available if the lookup table has three or fewer values and is desirable if you want to see all possible values in addition to the selected value. This style is only available in file cabinet grids (in index forms and workflow forms, the **Plain** style will be used).

To select a value using a lookup table in the **Radio** style:

1. Begin indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.
2. In the file cabinet grid, select a lookup value by clicking the radio button next to the value.



3. Continue indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.

Color Code Lookup Values in the Grid

Lookup values can display in color in the file cabinet grid.

To show lookup values in color:

1. Open the lookup table (right-click the file cabinet field header).
2. Check the **Values in Color** option and close the lookup table. The lookup values display in color in the file cabinet grid.

Notes:

- For list fields, this setting only works if there is one value in the list field.
- The display colors are selected based on the distinct number of values available to color code.

Show the Lookup Value Description in the Grid

If your lookup has two columns, you can show the display column value as the mouseover text for the lookup column value in the file cabinet grid.

To show the description value in the grid:

1. Open the lookup table (right-click the file cabinet field header).
2. Check the **Value Description** option and close the lookup table. When you move the pointer over a lookup value in the file cabinet grid, the corresponding display column value (the "description") displays as the mouseover text.

Note: For list fields, this setting only works if there is one value in the list field.

Distinct Values

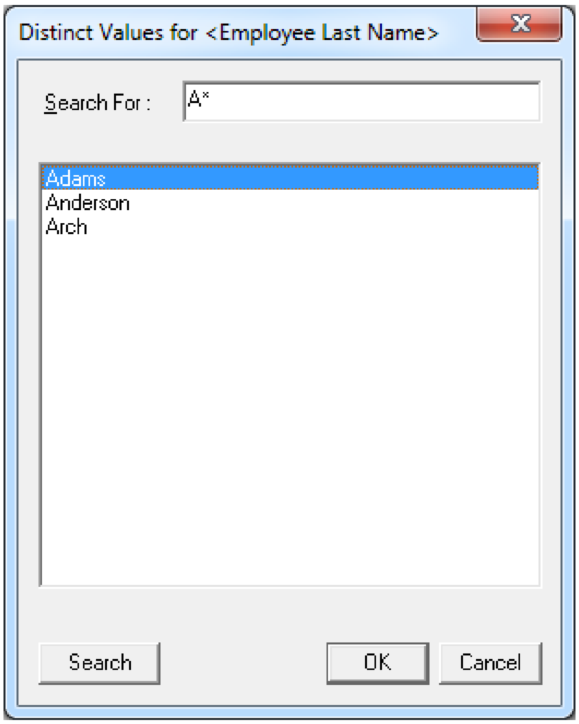
Choose a value from a list of unique values that already exist for that file cabinet field when indexing, searching, and modifying in a file cabinet.

Note: The distinct values list may or may not be available to select from depending on how your administrator configured the field in Feith Control Panel. They may choose to disable this option for performance reasons. Or the administrator may create the field without an index, which also results in this option being disabled for performance reasons.

To select a value using the distinct values list:

1. Begin indexing, searching, and modifying in a file cabinet.
2. Right-click on a file cabinet field and select **Distinct Values**. The **Distinct Values** window opens.

   If the **Distinct Values** menu option is grayed out, the file cabinet field is not indexed.
3. To search the distinct value list, enter search criteria and click **Search**.



4. Select a value from the list.
5. Click **OK**. The selected value is filled into the field.
6. Continue indexing, searching, and modifying in a file cabinet.

Note: Distinct value lists are not supported in list fields.

Highlight Mode

Highlight values directly on a text or TIF page and insert the value into a file cabinet field when indexing, searching, and modifying in a file cabinet or searching and modifying in a workflow task. You can also leap on the value, dial the value, or copy the value to the clipboard.

To turn on highlight mode, view a text or TIF page and click the **Highlight Mode** button.

Notes:

- On TIF pages, highlight mode only works with monochrome and grayscale TIF pages.
- On TIF pages you can highlight multiple lines if desired (e.g. an address block or list of email addresses), and the value will be stored in the file cabinet as multiple lines. You do not have to insert the value into a list field (a field that stores multiple values); you can insert the value into a regular string field. If you do highlight multiple lines and insert the multi-line value into a list field, note that each line is stored as a separate value and the list of values will be ordered in the field.

See the following for instructions:

- Insert Highlighted Value into File Cabinet Field.
- Leap on Highlighted Value
- Dial Highlighted Value
- Copy Highlighted Value to Clipboard

Insert Highlighted Value into File Cabinet Field

To insert a highlighted value into a file cabinet field:

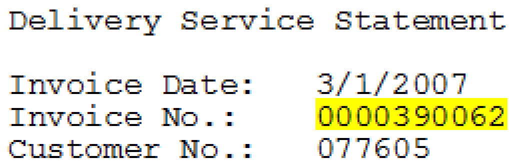
1. View a text or TIF page while when indexing, searching, and modifying in a file cabinet or searching and modifying in a workflow task.
2. Make sure the **Highlight Mode** button is on.
3. Click and drag on the page to highlight the desired value.

A value highlighted on a TIF page.

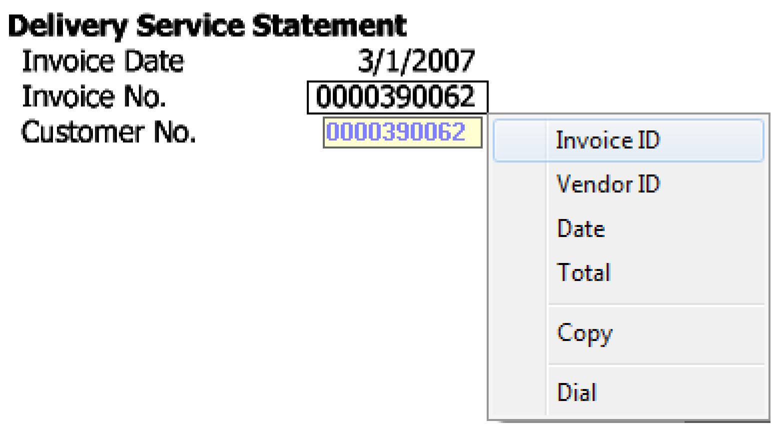
Delivery Service Statement

Invoice Date	3/1/2007
Invoice No.	0000390062
Customer No.	077605

A value highlighted on a text page.



4. Upon releasing the mouse button, a preview of highlighted text is displayed and a menu lists the file cabinet fields. In the list, select the file cabinet field into which you want to enter the highlighted value.



5. The value is entered into the selected field.

Leap on Highlighted Value

To leap on a highlighted value:

1. View a text or TIF page in the file cabinet.
2. Make sure **Highlight Mode** is on.
3. Click and drag on the page to highlight the desired value.
4. Upon releasing the mouse button, a preview of highlighted text is displayed and a menu lists the available leaps (only highlight leaps and URL leaps are supported). In the list, select the desired leap.
5. The leap is executed. See Leaps for more information.

Dial Highlighted Value

To dial a highlighted phone number:

1. View a text or TIF page in the file cabinet.
2. Make sure **Highlight Mode** is on.
3. Click and drag on the page to highlight the desired phone number value.
4. Upon releasing the mouse button, a preview of highlighted text is displayed and a menu lists the available options. Select **Dial**.
5. A third-party calling application is opened to dial the highlighted phone number.

Copy Highlighted Value to Clipboard

To copy a highlighted value to the clipboard:

1. View a text or TIF page in the file cabinet.
2. Make sure **Highlight Mode** is on.
3. Click and drag on the page to highlight the desired value.
4. Upon releasing the mouse button, a preview of highlighted text is displayed and a menu lists the available options. Select **Copy**.
5. The value is copied to the clipboard.

List Fields

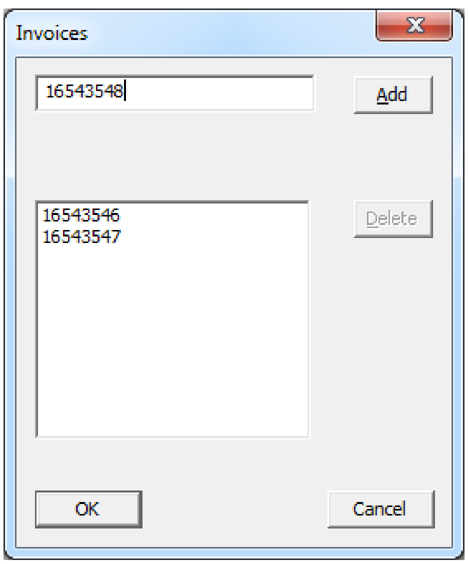
A list field can contain multiple values (e.g. a list of invoices or a list of email addresses). There are three types of list fields: **List of Strings**, **List of Numbers**, and **List of Dates**. To enter values into a list field, either use the friendly list dialog or quickly type values in with delimiters when indexing, searching, and modifying in a file cabinet or searching and modifying in a workflow task.

Add Values with List Dialog

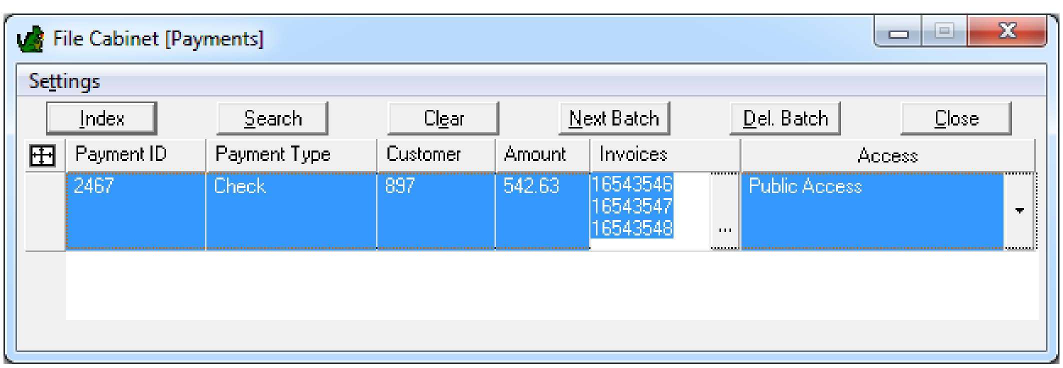
To add values to a list field with the list dialog:

1. Begin indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.
2. Place your cursor in the list field. Inside the field, the list  button appears.
3. Click the list button. The list dialog opens.
4. Enter a value in the top field then click **Add**. The value is added to the list.

   Continue to add values as needed.



5. When you are done adding values, click **OK**. The values are put into the list field.

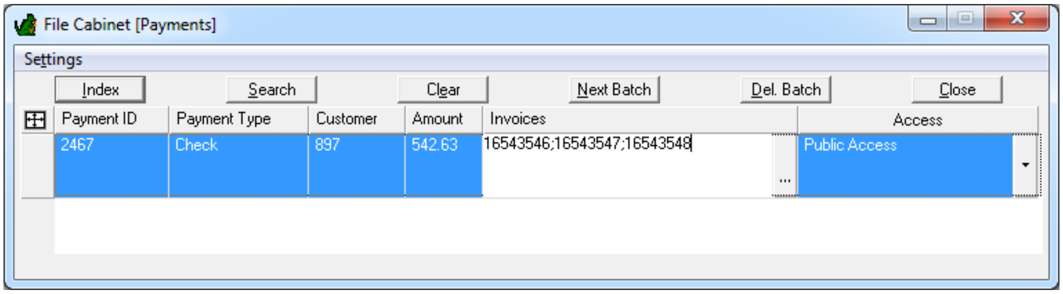


6. Continue indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.

Add Values by Typing with Delimiters

To add values to a list field by typing with delimiters:

1. Begin indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.
2. Place your cursor in the list field.
3. Type the values, separating each value with a semicolon.



4. Continue indexing, searching, or modifying in a file cabinet or searching or modifying in a workflow task.

User Administration

Change Your Password

Use the **Change Password** option to change your password.

Note: On MS SQL Server, a user must have a database role of "Feith Connect With DB Owner" or "Database Admin" in order to change their password. A "Feith Connect" user cannot change their password.

To change your password:

1. From the **Admin** menu, select **Change Password**. The **Change Your Password** dialog opens.
2. Enter your **Old Password**.
3. Enter your **New Password**. The new password must meet the password requirements.

   The FDD administrator can set password complexity requirements in the Feith Control Panel. These requirements are displayed on the **Change Your Password** dialog 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 (i.e., punctuation characters).
4. Re-enter the new password for confirmation.

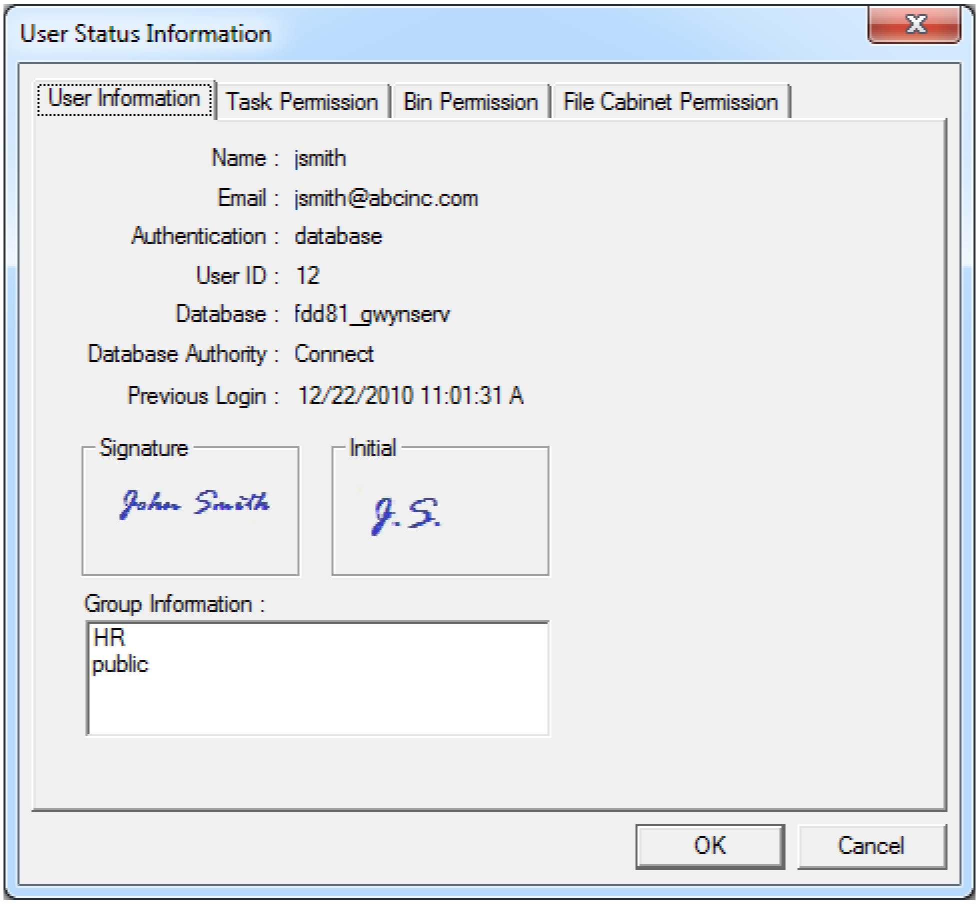
5. Select **OK** to save changes and exit. Select **Cancel** to exit without changing your password.

View User Status

View information about your group membership and permissions assignment in the **User Status** window.

To view your current user status:

1. From the **Admin** menu, select **User Status**. The **User Status Information** window opens.



2. Select a tab:

   - **User Information:** Shows user name, email address, authentication type, user ID, server, database authority, previous login, and group information. Also shows your signature and initial personal stamps (see Personal Stamps for more information).
   - **Task Permissions:** Shows all of the tasks that you may perform in FDD.
   - **Bin Permissions:** Lists bin permissions (search, view, insert, update, and delete).
   - **File Cabinet Permissions:** Lists file cabinet permissions (search, view, insert, update, and delete).

3. Click **OK** to close the window.

User Status can also be accessed from **Help**>**About**.

Note that only a system administrator can change group membership or permissions.

Update Permissions

Task and resource permissions are assigned when you login to FDD. If the system administrator changes your permissions after you start FDD, you can update your permissions.

To update your permissions:

- Select **Update Permissions** from the **Admin** menu. The FDD window refreshes and your permissions are updated.

To verify that changes have been made, select **User Status** from the **Admin** menu and check your permissions.

Change Preferences

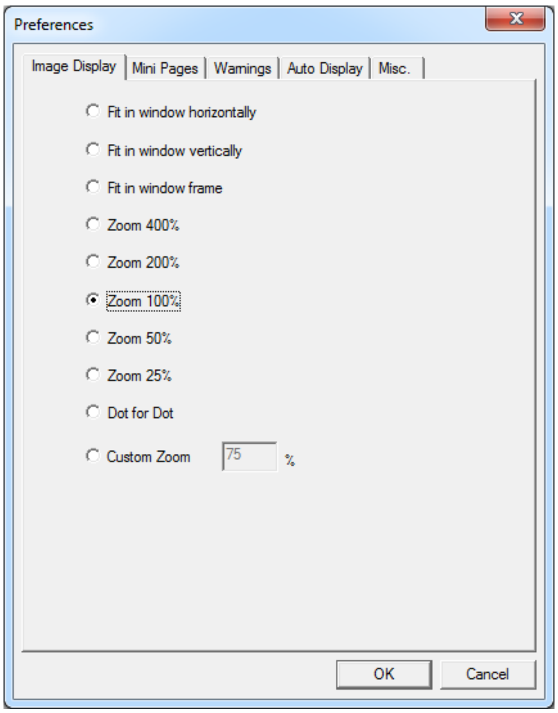
User preferences are settings that control various options. Options include image display size and warning messages.

To change your user preferences:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select one of the tabs: **Image Display**, **Mini Pages**, **Warnings**, **Auto Display**, or **Misc**.
3. Select an option. See the following descriptions for information specific to each tab.
4. Click **OK** to save your changes and exit the **Preferences** dialog.

Image Display Tab

The **Image Display** tab options control the way images are displayed in FDD.

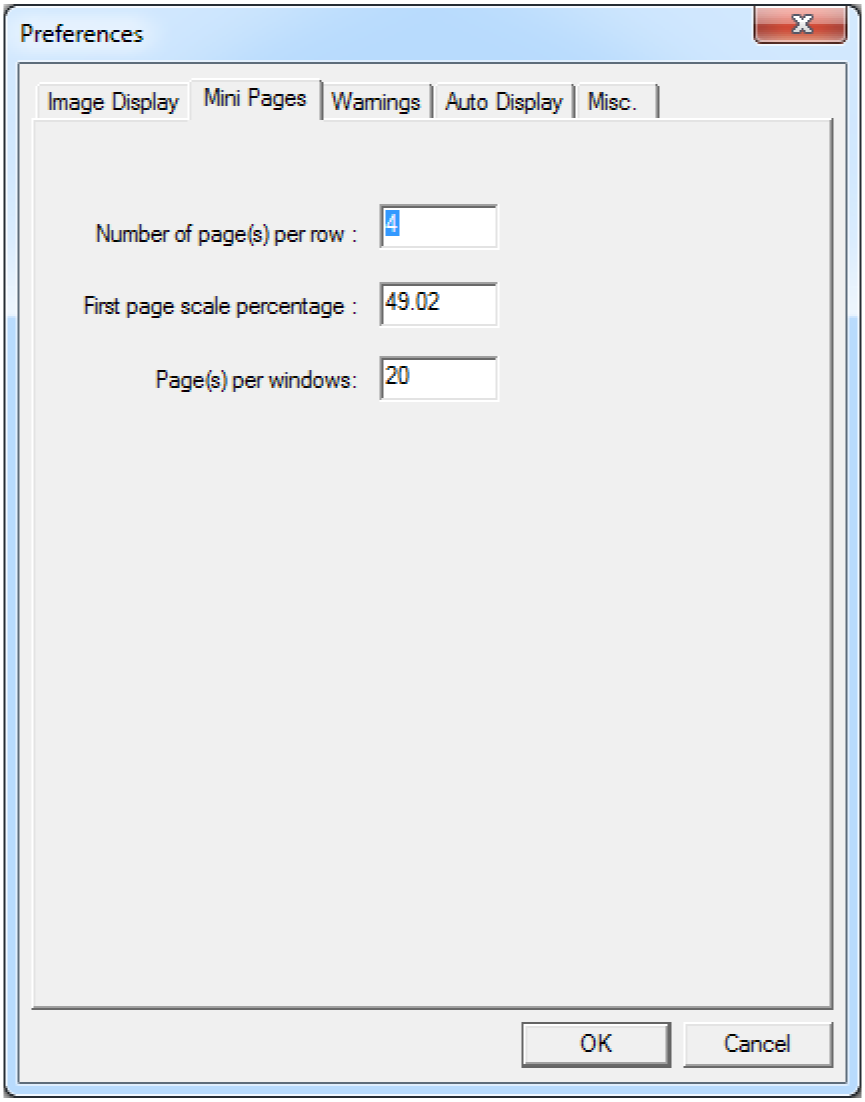


Select one of the following options by clicking the radio button.

- **Fit in Window Horizontally:** The image stretches or shrinks horizontally to fit the shape of the view window.
- **Fit in Window Vertically:** The image stretches or shrinks vertically to fit the shape of the view window.
- **Zoom 400%:** Displays the image at 4 times the actual resolution.
- **Zoom 200%:** Displays the image at 2 times the actual resolution.
- **Zoom 100%:** Displays the image at scanned resolution.
- **Zoom 50%:** Displays the image at half of the original resolution.
- **Zoom 25%:** Displays the image at a quarter of the original resolution.
- **Dot for Dot:** Displays the image at the monitor resolution.
- **Custom Zoom:** Displays the image at a size you choose. (Enter a percentage.)

Mini Pages Tab

The **Mini Pages** tab options control how minipages display. See Minipages for more information on minipages.

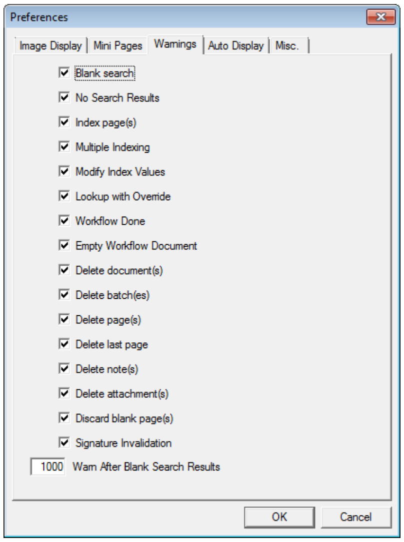


Enter a value for each setting. These settings can also be changed in the minipages window.

- **Number of Page(s) per Row:** Defines how many minipages can fit across the screen.
- **Page Scale Percentage:** Determines how much screen area each minipage occupies when displayed in the minipage window.
- **Page(s) per Window:** Specifies the number of pages to display in one set of minipages. If the total number of pages in a document is higher than this setting, multiple sets of minipages will be created. Each set created contains the maximum number of pages per window.

Warnings Tab

The **Warnings** tab options control what warning messages display in FDD.

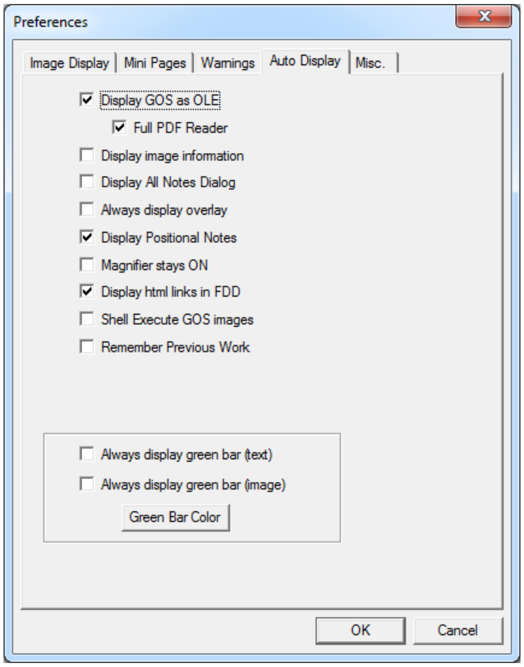


Check any of the following options:

- **Blank Search:** Displays a warning to confirm that you want to conduct a blank search. (A **blank search** is a search without specified criteria; it returns all documents contained in a file cabinet.)
- **Index Page(s):** Displays a confirmation dialog after a page (or pages) is indexed.
- **Multiple Indexing:** Displays a warning each time you attempt to index a page (or pages) more than once.
- **Modify Index Values**: Displays a warning to confirm the modification of index values in workflow.
- **Lookup with Override**: Displays a warning when indexing or modifying index values if a non-lookup value is entered in a field with a lookup with override granted.
- **Workflow Done:** Displays a confirmation dialog when a workflow document is processed.
- **Empty Workflow Document:** Displays a warning when a workflow document has no pages.
- **Delete Document(s):** Displays a warning to confirm the deletion of a document.
- **Delete Batch(es):** Displays a warning to confirm the deletion of a batch.
- **Delete Page(s):** Displays a warning to confirm the deletion of a page.
- **Delete Last Page:** Displays a message that the batch or document is not deleted when the last page is deleted. (Batches and documents are retained as a 0-page batches and documents when the last page is deleted.)
- **Delete Note(s):** Displays a warning to confirm the deletion of a note.
- **Delete attachment(s):** Displays a warning after sending mail from FDD that the attachments will be deleted. (The attachments are not deleted until the user clicks **OK**.)
- **Discard Blank Page(s):** Displays a warning that a blank page has been detected. (Applicable when scanning two sides and threshold detection is enabled.)
- **Signature Invalidation:** Displays a warning that the pending operation may invalidate the digital signature applied to the document. Operations that will invoke this warning are adding pages, deleting pages, reordering pages and deleting page signatures or initials.
- **Warn After Blank Search Results:** Enter the number of documents you want to come back before you receive the blank search warning.

Auto Display Tab

The **Auto Display** tab options include automatic display of image information and overlays.

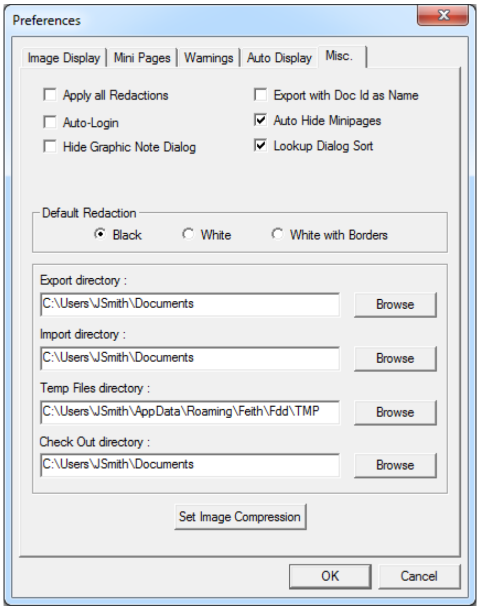


Check any of the following options:

- **Display GOS as OLE:** Displays GOS files as OLE through in-place activation of MS Word, MS Excel and Adobe PDF.
- **Full PDF Reader**: The **Full PDF Reader** option is recommended if you are viewing PDF files with Adobe Reader 7 or newer. If this option is checked, the PDF document will display along with tools from PDF Reader. If this option is not checked, the PDF document will simply display. Note this option is only available if the **Display GOS as OLE** option is selected. If a PDF is still not viewable with this option turned on, confirm the **Display PDF in browser** setting is turned on in Adobe.
- **Display Image Information:** Shows the **Image Information** window when an image is displayed in FDD.
- **Display All Note Dialog**: Automatically displays the **All Notes** dialog when a batch or document is viewed.
- **Always Display Overlays:** Automatically displays overlay pages when the associated text page is viewed.
- **Display Positional Notes:** Displays positional notes (sticky notes).
- **Magnifier Stays ON:** The Magnifier is opened and remains active when new pages are viewed in the FDD window.
- **Display HTML links in FDD:** Opens links inside the FDD window. (If this option is unchecked, links open in a new browser window.)
- **Shell Execute GOS Images**: Automatically launches a GOS page in the application associated with its file type when the GOS page is viewed.
- **Remember Previous Work:** Logging into FDD automatically launches the Work To Do window or the last document viewed, based on what was open when FDD last closed.
- **Always Display Green Bar:** Displays green bar whenever a document is viewed (text or image). Like green bar paper, it enhances the readability of the document.
- **Green Bar Color:** Press this button to choose the green bar color from a palette.

Miscellaneous Tab

The **Misc** tab options control miscellaneous preferences.



The miscellaneous preferences are:

- **Apply all Redactions**: Displays redaction notes as redacted (either blacked out or whited out) to all users. This option allows the creator of a redaction note to preview its display. See Redaction Notes for more information on redaction notes.
- **Auto-Login:** Enables automatic login. When both this option and the **Remember Password** option (on the **Login** dialog) are selected, a user is automatically logged into FDD. See Login to FDD for more information.
- **Hide Graphic Note Dialog:** Hides the graphic note dialog when using the graphic note toolbar buttons and hotkeys. However, the graphic note dialog box will always display when you select **Graphic** from the **Note** menu or select **Sticky Notes>Graphic** from the FDD view window context menu.
- **Auto Hide Minipages**: Automatically minimizes the **Minipages** window when a minipage is displayed in the FDD window. (Double-clicking a page in the **Minipages** window displays that page in the FDD window.)
- **Lookup Dialog Sort:** Makes values in the Lookup dialog sortable.
- **Export with Doc ID as Name**: If checked, the suggested file name for exported pages and documents will be the Doc ID (the unique ID of the batch or document). If not checked, the suggested file name for exported pages and documents will be the batch name (if exporting from a batch) or the first column index value (if exporting from a document).
- **Default Redaction**: Configure the default redaction style. Individual redaction zones can be changed from the default redaction style. See Redaction Notes for more information.
- **Export Directory:** Specifies the default directory used when exporting files from FDD.
- **Import Directory:** Specifies the default directory used when importing files into FDD.
- **Temp Files Directory:** Specifies the directory where temporary FDD system files and images are stored.
- **Check Out Directory:** Specifies the default directory where checked out GOS files are saved.
- **Set Image Compression**: Sets the image compression used for export.

Acquire Pages into FDD

Introduction to Scanning and Importing

Scan or 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 may not. The pages will wait in batches in the bin until they are permanently indexed into a file cabinet.

Get started:

- Prepare your pages and then scan.
- Import files as pages. 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.
- Manage your batches as needed to prepare the way for quick, easy indexing. Scan 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:

- Scan or import directly into a file cabinet
- Add a new page to an existing document

Note: Scanning is only supported on FDD scan stations.

Scan

Scan Preparation

Prepare Paperwork

We recommend these guidelines in preparing paperwork for the scanner:

- Remove paper clips, tape, Post-It Notes, staples, etc. from pages. These items might jam your scanner and cause serious damage.
- Arrange pages in the order you want them to appear in the batch after scanning. Putting the pages in chronological order may make indexing easier.

Adjust Scanner Controls

Scanners have many settings that affect image quality. Controls like "intensity" and "contrast" have an impact on the way the image appears on the screen. "Compression" determines how much disk space the image uses when stored.

It may be necessary to adjust the scanner controls when you are scanning page types different than those normally scanned. This might include very light or very dark pages, odd size pages, or pages with different orientations (i.e., landscape or portrait).

Troubleshooting

When you press **Test Scan** to check your scanner settings, you may receive a "**Failure to open scanner**" message. This message might indicate you have selected a scanner setting that is incompatible with your scanner. Try adjusting the settings; a different setting may resolve the problem.

For example:

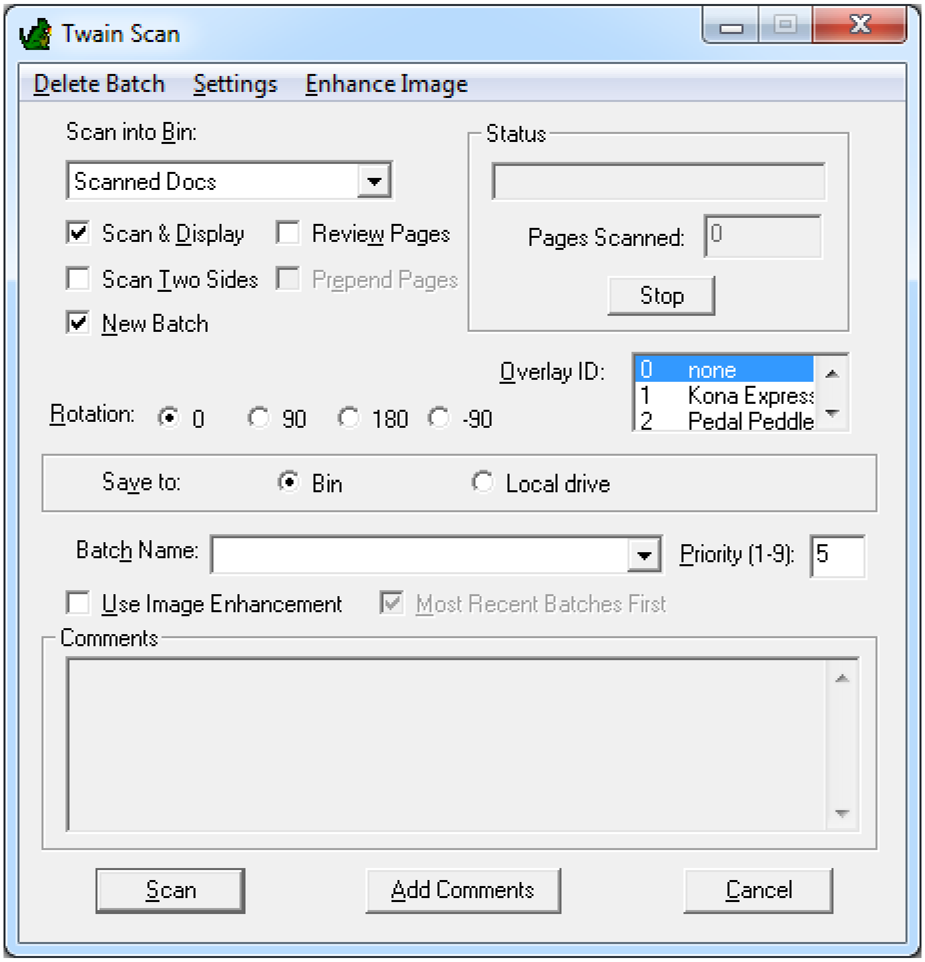
- If **Contrast** is set to **Automatic**, try switching it to **Manual**.
- If **Orientation** is set to **Landscape**, try switching it to **Portrait.**
- Make sure that the **Paper Feed** setting (**ADF** or **Flatbed**) is correct for your scanner.

Scan

Scan pages into FDD using your scanner's twain interface.

To scan pages into FDD:

1. From the **File** menu, select **Acquire**, then select **Scan**. The **Twain Scan** window opens. Alternatively, use the keyboard shortcut **F6**.



2. Select a bin from the **Scan Into Bin** list. Bins are temporary storage areas used by FDD to hold unindexed pages (i.e., pages that have not yet been filed).
3. Select any of the scan options:
    - **Scan & Display:** Displays the image on the screen immediately after it is scanned. Useful for identifying scanning errors as they occur.
    - **Scan Two Sides:** Used to scan double-sided pages with an automatic feeder. See Scan Double-Sided Pages for instructions on scanning both sides of a page.
    - **New Batch:** Creates a new batch. A batch is one or more pages stored together in a bin. You can either scan into an existing batch or create a new batch.
    - **Review Pages:** Opens the scanned pages in minipages immediately after scanning. The pages can be manipulated before saving the new batch (see Minipage Functions for more information).
    - **Prepend Pages:** Prepends the scanned pages to the selected batch. Only available if scanning into an existing batch.

- **Rotation:** Rotates the scanned images. Options are **0°** (no rotation), **90°** (90° right), **180°**, or **-90°** (90° left). The default selection is 0°. The 90° or -90° rotation option can be used to achieve the effect of landscape orientation.

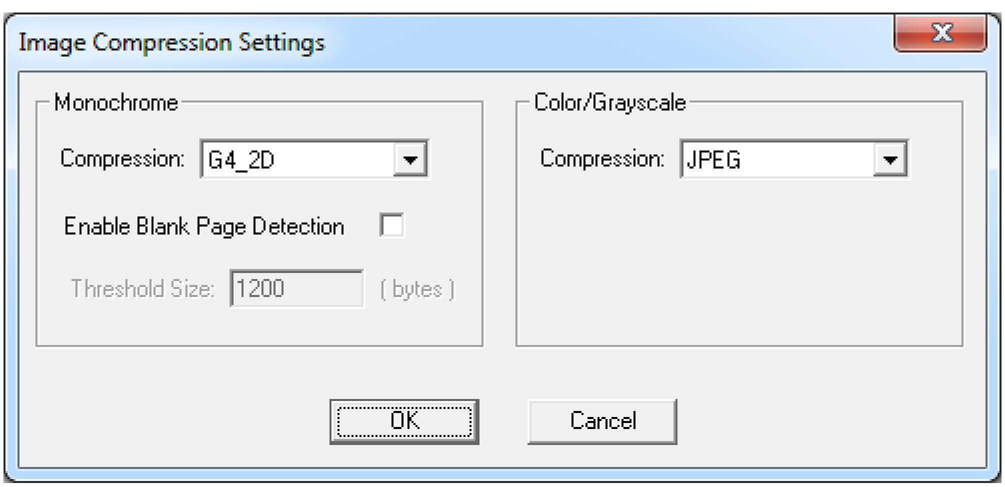
4. Optionally choose an **Overlay ID**. Overlays are listed by ID and name. See Overlays for more information on overlays.
5. Select the **Save To** location:
   - **Bin:** Images are saved to the storage server associated with the bin into which you are scanning.
   - **Local Drive:** Images are saved to the local drive. Images scanned to the local drive cannot be viewed on any other workstation until you have used the **Move Local Images** option (under the **File** menu) to transfer the images to the storage server.
6. Enter a **Batch Name** (if creating a new batch) or choose an existing batch from the **Batch Name** list (if scanning into an existing batch).

   Every set of scanned pages (called a batch) must have a unique name. You may name the batch yourself by typing a word in the **Batch Name** list box, or allow FDD to automatically assign a batch name. If you decide to name the batches, you may use up to 64 characters. If you don't manually name your batches, FDD will automatically assign names for you. FDD assigned batch names consist of the date, time, and a sequential number. These file names are very useful, since they record the time and date that each batch was scanned.
7. Optionally assign a **Priority**. Batch priority is assigned on a scale of **1** to **9**, with **1** being the highest priority.
8. Optionally choose to **Use Image Enhancement**. To configure Image Enhancement, click the **Enhance Image** menu. See Image Enhancement for more information.
9. Optionally add **Comments**. Comments may be typed and stored with the batch.
10. Click **Scan** to activate the scanner. Your scanner's twain interface opens.
11. Scan the pages you want to add and exit the twain interface.
12. Click **Exit** when you are finished scanning.

Twain Scan Settings

To view and modify twain scan settings:

1. From the **File** menu, select **Acquire**, then select **Scan**. The **Twain Scan** dialog window opens.
2. Click the **Settings** option at the top of the dialog box. The **Image Compression Settings** dialog window opens.



3. Select the compression type for **Monochrome** images. Choose either **No Compression**, **G3_1D** or **G4_2D**.

   If desired, enable threshold detection (for monochrome images) be checking the **Enable Blank Page Detection** option. This option is dependent on compression and is only available if you have selected G3_1D or G4_2D compression.

   If needed, adjust the default **Threshold Size**. Scanned images smaller than the threshold size will not be stored to FDD. (This option is editable only if **Enable Blank Page Detection** is checked.)
4. Select the compression type for **Color/Grayscale** images. Choose either **No Compression**, **JPEG**, or **PackBits**.
5. Click **OK** to exit the **Image Compression Settings** dialog. The new settings are saved.

Rescan Pages

If a page jams or does not scan correctly, you can add it to a batch by rescanning it. This method avoids rescanning pages that have been scanned successfully.

Rescan Single-Sided Documents

To rescan single-sided documents:

1. Clear any jam in the document feeder.
2. Reload the un-scanned pages into the document feeder.
3. From the **File** menu, select **Acquire**, then select **Scan**. The scan dialog opens.
4. Press **Scan**. The pages are scanned.

Rescan Double-Sided Documents

If the paper jams when scanning side one of a document:

1. Clear any jam in the document feeder.
2. Reload the un-scanned pages into the document feeder.
3. From the **File** menu, select **Acquire**, then select **Scan**. The scan dialog opens.
4. Press **Scan**. The pages are scanned.

If the paper jams when scanning side two of a document:

1. Clear the jam.
2. Treat side one as complete and scan side two of the document.
3. Reload the un-scanned pages into the document feeder.
4. From the **File** menu, select **Acquire**, then select **Scan**. The scan dialog opens.
5. Check the **Scan Two Sides** option.
6. Press **Scan**. The pages are scanned. The resulting batch is complete and in the proper page order.

Scan Double-Sided Pages with a Simplex Scanner

The **Scan Two Sides** function enables you to easily scan both sides of double-sided documents with a Simplex Automatic Document Feeder and still get all the pages in the correct page order.

During this procedure, you scan one side of each page in a batch, then turn over the batch and scan the other side. FDD automatically reorders the pages so they are in the correct sequence after the entire batch has been scanned. This feature reduces the need for dual-sided scanners.

To scan double-sided pages using **Twain Scan**:

1. From the **File** menu, select **Acquire**, then select **Scan**. The **Twain Scan** dialog opens.
2. Check the **Scan Two Sides** option. Complete other scanning information as necessary.
3. Arrange the document in page order so that the first side of each page (for example, pages 1, 3, 5, 7 and 9 of a 5-page document) will be scanned. Load the batch into the scanner.
4. Click **Scan** to activate the scanner. FDD scans the first side of each page in the batch. The **Status** box indicates the progress of the scan.
5. When scanning of side one is complete, you will be prompted to reload the feeder to scan the second side of each page in the batch.
6. Turn the document over and load it in the Automatic Document Feeder so that side two of each page (pages 10, 8, 6, 4 and 2) will be scanned.
7. Click **OK** to activate the scanner.
8. FDD will arrange the batch pages in the proper order. Any settings you specified for the first pass (e.g., **Save Location**, **Scan and Display**) will automatically be applied to the second side.
9. You may continue to scan single-sided or double-sided documents.
10. Click **Exit** when you are finished scanning.

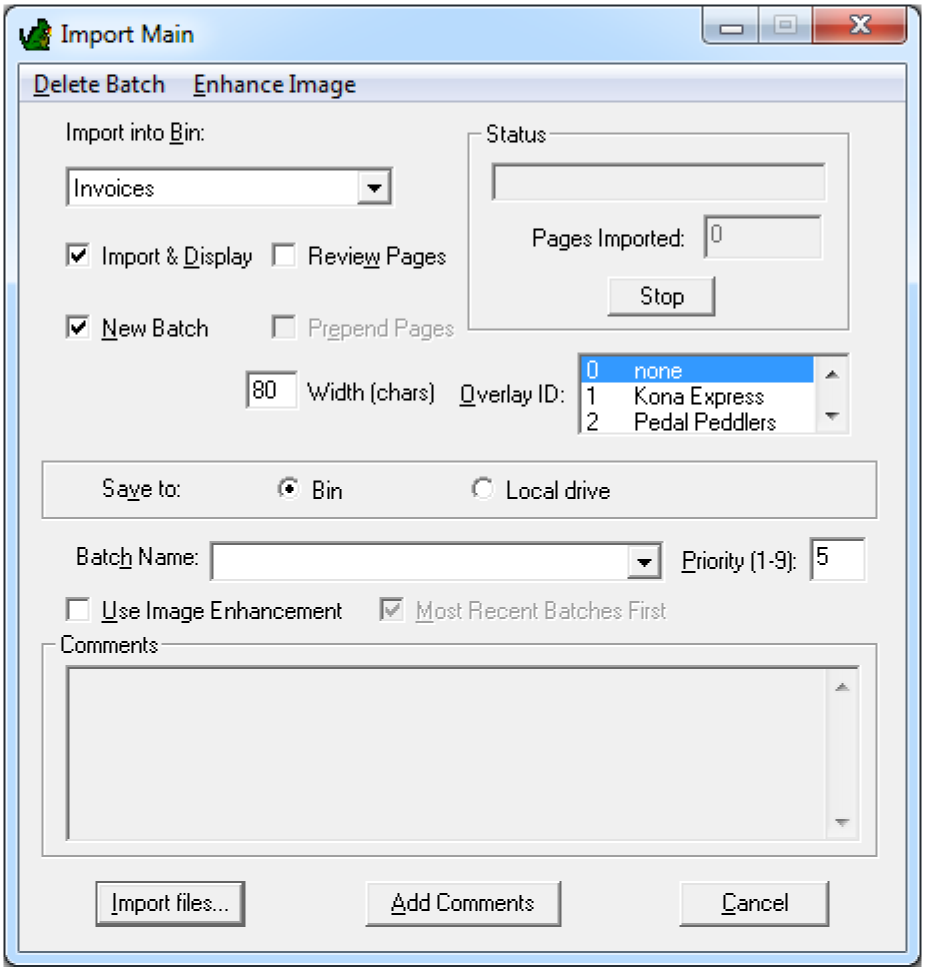
Import Pages

Importing allows you to store images files (TIFF or JPEG format), ASCII text files, and GOS (Generalized Object Storage) files in FDD. GOS files include Windows files such as word processing documents, spreadsheets, and e-mail.

Tip: Drag-and-and drop a file from your computer onto a bin, file cabinet, batch, or document on the folder bar in order to import it.

To import a file into FDD:

1. From the **File** menu, select **Acquire**, then select **Import**. The **Import Main** window opens.



2. Select a bin from the **Import Into Bin** list. Bins are temporary storage areas used by FDD to hold unindexed pages (i.e., pages that have not yet been filed).
3. Select any of the import options:
   - **Import & Display:** Displays the image on the screen immediately after it is imported.
   - **New Batch:** Creates a new batch. A batch is one or more pages stored together in a bin. You can either import into an existing batch or create a new batch. Un-check **New Batch** to select an existing batch from the drop-down box.
   - **Review Pages:** Opens the imported pages in minipages immediately after import. The pages can be manipulated before saving the new batch (see Minipage Functions for more information).

   - **Prepend Pages:** Prepends the imported pages to the selected batch. Only available if importing into an existing batch.
   - **Width (chars):** Sets the line length for a text page.
4. Optionally choose an **Overlay ID**. Overlays are listed by ID and name. See Overlays for more information on overlays.
5. Select the **Save To** location:
   - **Bin:** Images are saved to the storage server associated with the bin into which you are importing.
   - **Local Drive:** Images are saved to the local drive. Images imported to the local drive cannot be viewed on any other workstation until you have used the **Move Local Images** option (under the **File** menu) to transfer the images to the storage server.
6. Enter a **Batch Name** (if creating a new batch) or choose an existing batch from the **Batch Name** list (if importing into an existing batch).

   Every set of imported pages (called a batch) must have a unique name. You may name the batch yourself by typing a word in the **Batch Name** list box, or allow FDD to automatically assign a batch name. If you decide to name the batches, you may use up to 64 characters. If you don't manually name your batches, FDD will automatically assign names for you. FDD assigned batch names consist of the date, time, and a sequential number. These file names are very useful, since they record the time and date that each batch was imported.
7. Optionally assign a **Priority**. Batch priority is assigned on a scale of **1** to **9**, with **1** being the highest priority.
8. Optionally choose to **Use Image Enhancement**. To configure Image Enhancement, click the **Enhance Image** menu. See Image Enhancement for more information.
9. Optionally add **Comments**. Comments may be typed and stored with the batch.
10. Click the **Import Files** button. The **Open** window opens.
10. Browse to the file you want to import.
11. Select the file and click **Open**. The file is imported and you are returned to the **Import Main** window.
12. Click **Cancel** to return to the main FDD window when you finish importing.

Manage Batches

Scanned and imported pages are stored in 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 may not. The pages will wait in batches in the bin until they are permanently indexed into a file cabinet. Manage 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 sort batches in a bin:

- Right-click the bin and select **Sort By** then choose **Priority**, **Creation Time**, or batch **Name**.

To rename a batch:

1. In the folder bar, open the bin the batch resides in. By default, each batch is labeled with the date and time that it was created.
2. Right-click the batch and select **Rename**.
3. Enter the new batch name and click **Enter**.

To change a batch's priority:

1. In the folder bar, open the bin the batch resides in.
2. Select one or more batches. You can select multiple batches using **CTRL+click** or **SHIFT+click**.
3. Right-click the selected batch and select **Prioritize**. Batch priority is assigned on a scale of **1** to **9**, with **1** being the highest priority. The default sorting in the **Index a Batch** dialog lists batches in order of priority.
4. Select the new priority from the list. The priority of the batch(es) is changed.

To delete a page from a batch:

1. In the folder bar, open the bin the batch resides in.
2. Navigate to the page you want to delete using the page bar.
3. Click the **Delete Page** button in the page control bar. You are prompted to confirm you want to delete the page.
4. Click **OK** to continue with the delete. The page is deleted.

To delete a batch:

1. In the folder bar, open the bin the batch resides in.
2. Select one or more batches you want to delete. You can select multiple batches using **CTRL+click** or **SHIFT+click**.
3. Right-click the selected batch and elect **Delete**. You are prompted to confirm you want to delete the batch(es).
4. Click **OK** to continue with the delete. The batch(es) is deleted.

Add Pages

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

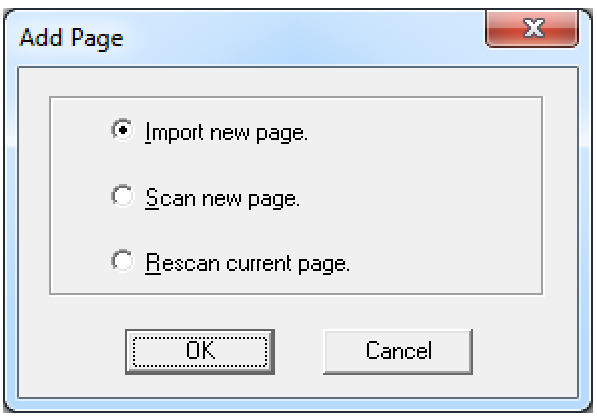
Note: Scanning is only supported on FDD scan stations.

To scan a new page into a document:

1. View the document in FDD.
2. Click the **Add Page** button on the page control bar. The **Add Page** dialog displays.
3. Select **Scan new page** and click **OK**. Your scanner's twain interface displays.
4. Scan the page you want to add and exit the twain interface. The page is added.

To import a new page into a document:

1. View the document in FDD.
2. Click the **Add Page** button on the page control bar.
3. On FDD scan stations, the **Add Page** window displays. Select **Import new page** and click **OK**. The **Open** dialog displays.

   On FDD view stations, the **Add Page** dialog is skipped and the **Open** dialog displays.
4. In the **Open** dialog, browse to the file(s) you want to import.
5. Select one or more files and click **Open**. The file(s) is imported and each file is added as a new page to the document. The document is redisplayed in FDD to show the new page.

To paste text or an image from the clipboard as a new page:

1. Copy the image or text to the clipboard.
2. In FDD, select **Edit>Paste**. The image or text is appended to the document as a new page. The document is redisplayed in FDD to show the new page.

Note: This feature is not supported for Forms iQ pages, where it is more desirable to paste information from the clipboard into the form fields.

To drag and drop a file as a new page:

1. In the folder bar expand a bin to view the list of batches or perform a search in a file cabinet. The batches or documents are listed in the folder bar.
2. Drag-and-drop one or more files onto the desired batch or document. The file(s) is imported and each file is added as a new page to the batch or document.

To scan or import a new page into a document with no pages:

1. Select the document in the file cabinet grid.
2. Right-click the document row in the file cabinet grid and select **Add Page** from the menu.
3. From the submenu, choose **Scan**, **Import Files**, **Import Files as GOS**, **Import Files as Section**, or **Paste Page**.
4. Depending on which **Add Page** method you selected, one of the following will happen:
    - If you are **Scanning** pages, the scanner's twain interface opens. Scan the pages you want to add and exit the twain interface. The pages are added to the document.
    - If you are **Importing Files**, the **File Open** window opens. Browse to find the file(s) you want to import and click **Open**. The pages are added to the document.
    - If you are **Pasting a Page**, the content of the clipboard is added to the document as a page.

To scan or import a new page into multiple documents at once:

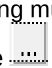
1. Select multiple documents in the file cabinet grid.
2. Right-click one of the selected documents and select **Add Page** from the menu.
3. From the submenu, choose **Scan**, **Import Files**, **Import Files as GOS**, **Import Files as Section**, or **Paste Page**.
4. Depending on which **Add Page** method you selected, one of the following will happen:
    - If you are **Scanning** pages, the scanner's twain interface opens. Scan the pages you want to add and exit the twain interface. The pages are added to the documents.
    - If you are **Importing Files**, the **File Open** window opens. Browse to find the file(s) you want to import and click **Open**. The pages are added to the documents.
    - If you are **Pasting a Page**, the content of the clipboard is added to the documents as a page.

Acquire Pages into a File Cabinet

To scan or import directly into a file cabinet:

1. Right-click the file cabinet grid and select **Index New** from the menu.

   Optionally right-click an existing document to copy over its index values for the new document.
2. From the submenu, choose either **Scan** or **Import Files**.
3. If you are **Scanning** pages, the scanner's twain interface displays. Scan the pages you want to add and exit the twain interface.

   If you are **Importing Files**, the **File Open** dialog displays. Browse to find the file(s) you want to import, select them, and click **Open**.
4. Enter the index values for the new document into the file cabinet grid. There are many options for entering index values:
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - If the field has a question mark "?" in the header, right-click the header to choose from a list of suggested values in the **Field Look Up** dialog. Alternatively, you may select a lookup value using the **Dropdown** or **Radio** style. See Lookup Tables for more information.
   - Select from a list of unique values that already exist for that file cabinet field by right-clicking in the field's column and selecting **Distinct Values**. See Distinct Values for more information.
   - In **Highlight Mode** on text and TIF pages, highlight a value on the page itself and select a field to insert the value. See Highlight Mode for more information.
   - If entering multiple values into a list field, enter each value separated by a semicolon or click the  button to add values. See List Fields for more information.
   - Bookmark index values to use them later by right-clicking in the grid and selecting **New Bookmarks>Index Values**. Use an index values bookmark by double-clicking the bookmark in the folder bar. See Bookmark Index Values for more information.
   - Note that some index fields may be read-only and you will not be able to enter a value in them.
   - Also note that a value of 12:00 AM in a datetime field is stored as 0:00 AM.
3. Click **OK.** The new document is indexed into the file cabinet.

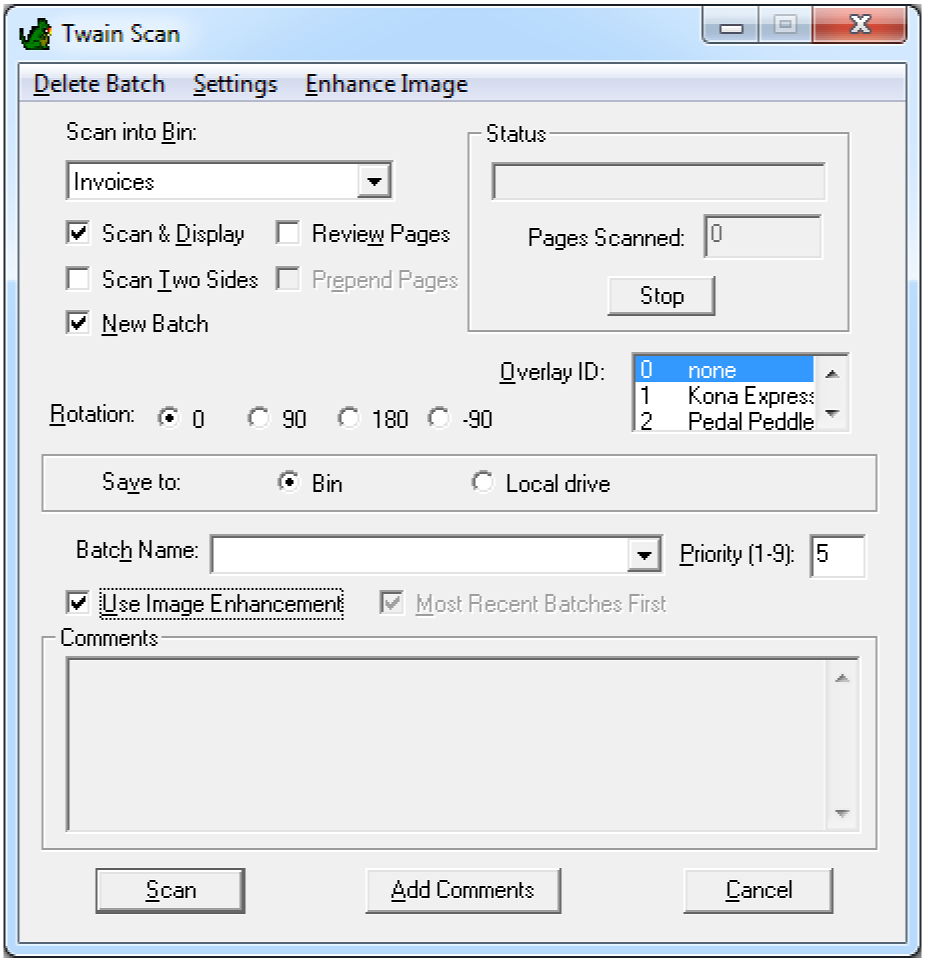
   Note: If you entered index values identical to an existing document, the page is appended automatically.

Image Enhancement

You can improve the appearance of scanned or imported images by using Image Enhancement. To use this feature, check the **Use Image Enhancement** box in the scan dialog before scanning an image into FDD.

Please note that Image Enhancement is meant to be used only as a repair method. Image Enhancement may have a negative effect on documents of good or normal quality. The most benefit will be noticed when using Image Enhancement to improve documents that are of poor quality.

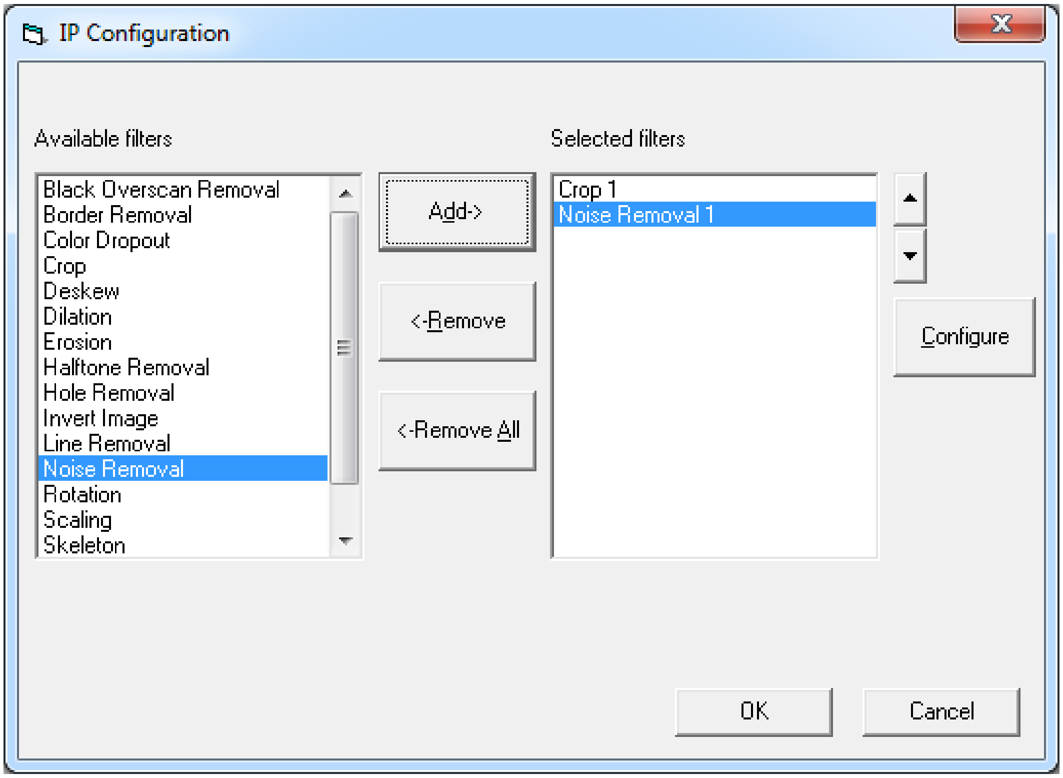
Also note that using Image Enhancement may increase the scan time when you are scanning several pages.



Configure Image Enhancement

To configure Image Enhancement:

1. From the **File** menu, select **Acquire**, then make the desired selection (**Scan** or **Import**). The appropriate dialog opens.
2. Click the **Enhance Image** button. The **IP Configuration** window opens.



3. You can add, remove, and configure the filters you want to apply to scanned images. For more information on the filters and their settings, refer to the documentation on PixTools, made by Pixel Translations.
4. Click **OK**.

Please note that if you configure Image Enhancement to use several filters, it may increase the scan time when you are scanning several pages.

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
- Set your preferred index settings
- Correct indexing mistakes
- Bookmark index values
- Create pageless documents from data in a CSV file

Alternatively, you can skip the batches and bins and scan or 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.

See the following for instructions:

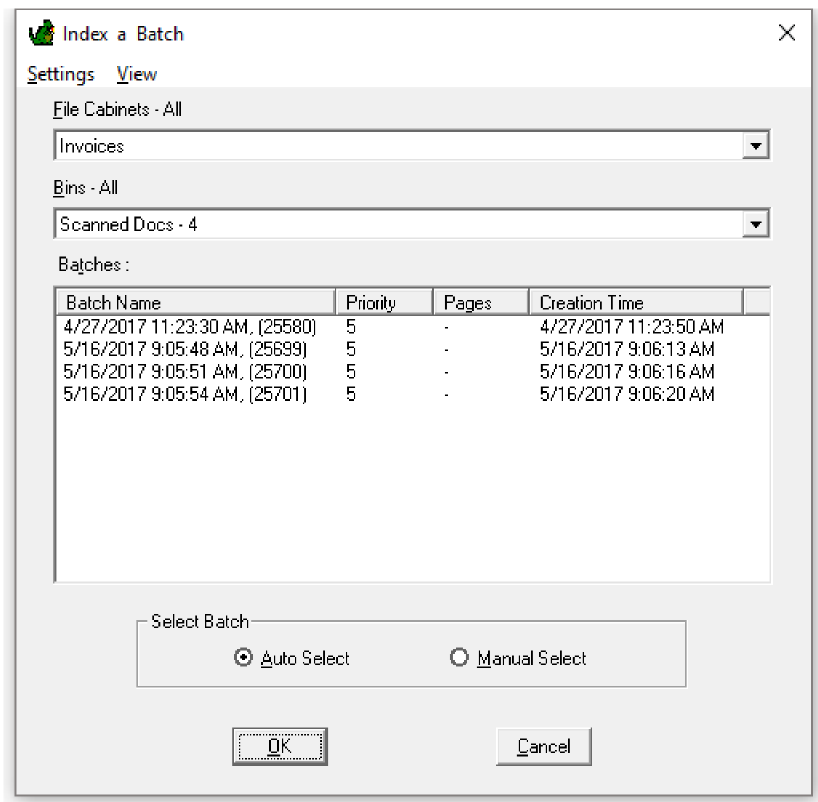
- Index Batches
- The Index Form
- Index Warnings
- Delete Batch during Indexing

Index Batches

To index a batch:

1. Select the Index! menu. The **Index a Batch** window opens.

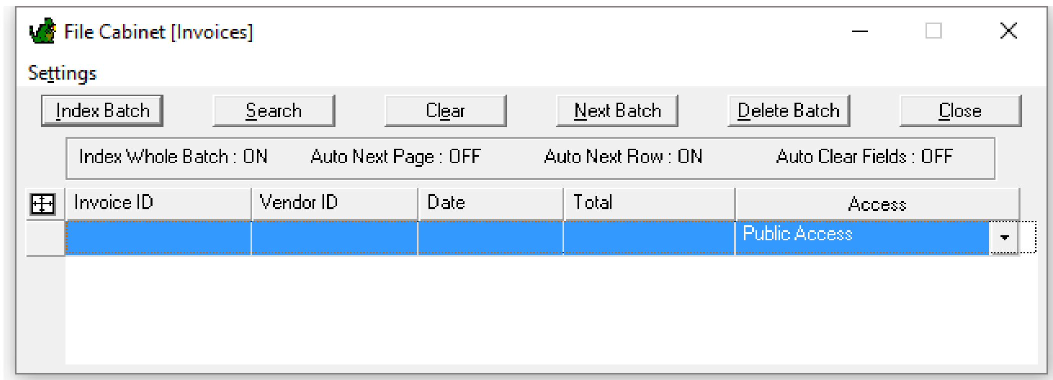
   Alternatively, in the folder bar select one or more batches then right-click and select **Index**. The **Index a Batch** dialog opens and only lists the selected batch(es). Select multiple batches using **CTRL+click** or **SHIFT+click**.



2. Enable or disable indexing options using the **Settings** menu: **Batch Order**, **Favorite File Cabinets**, **Favorite Bins**, **Form View**, and **Show Page Count**. See Index Settings for more information.
3. Select a file cabinet from the **File Cabinets** list. The batch will be indexed into this file cabinet.

4. Select a bin from the **Bins** list. The **Batches** list shows all batches contained in this bin.

   Click one of the headers to sort this list by batch name, priority, number of pages, or creation time.
5. Select a batch in the **Batches** list. To refresh the batch list, select **Refresh** from the **View** menu.
6. In the **Select Batch** section, choose **Auto Select** or **Manual Select**. Note that the behavior of Auto Select and Manual Select varies depending on the **Auto Next Page** and **Index Whole Batch** settings. See Index Settings for more information.
   - **Auto Select** is recommended when you are indexing pages of the batch to one file cabinet and want to automatically move from one to the next.
   - **Manual Select** is recommended if you are indexing the pages of the batch of multiple file cabinets.
7. Click **OK**. The file cabinet grid for the selected file cabinet opens.



8. Enable or disable indexing options using the **Settings** menu: **Auto Next Page**, **Index Whole Batch**, **Auto Batch Comment**, **Auto Clear Fields**, **Auto Next Row**, **First Column Focus**, and **Display Comment**. See Index Settings for more information.
9. Enter index values for the document. Index values are key information for identifying and finding the document. There are many options for entering index values:
   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - If the field has a question mark "?" in the header, right-click the header to choose from a list of suggested values in the **Field Look Up** dialog. Alternatively, you may select a lookup value using the **Dropdown** or **Radio** style. See Lookup Tables for more information.
   - Select from a list of unique values that already exist for that file cabinet field by right-clicking in the field's column and selecting **Distinct Values**. See Distinct Values for more information.
   - Search for another document to use its values. To do this, enter one or more field values and then click the **Search** button. Highlight a document's row to select it. If necessary, change any values that are different. See Search for Documents for more information on how to search in FDD.
   - In **Highlight Mode** on text and TIF pages, highlight a value on the page itself and select a field to insert the value. See Highlight Mode for more information.
   - If entering multiple values into a list field, enter each value separated by a semicolon or click the  button to add values. See List Fields for more information.
   - Bookmark index values to use them later by right-clicking in the grid and selecting **New Bookmarks>Index Values**. Use an index values bookmark by double-clicking the bookmark in the folder bar. See Bookmark Index Values for more information.

- Click **Clear** to clear index fields. If desired, you may then click **Reset** to reset the index field to their default values.
- Note that some index fields may be read-only and you will not be able to enter a value in them.
- Also note that a value of 12:00 AM in a datetime field is stored as 0:00 AM.

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

    Each permission template specifies what groups can access, add to, modify, and delete the specific document. Document permission templates are created in the Feith Control Panel. It is recommended you use the default "Public Access" setting. If you do not have the set access group permission, you will not see the access column.
11. Click **Index**. The page or batch is indexed and stored as a document in the file cabinet.

    Note: If you entered index values identical to an existing document, whether they were typed in or you searched for and selected an existing document, the page is appended automatically. If you searched for an existing document and changed one of its index values, you will be prompted whether you want to A) change the existing document's index values and append the page to that document, or B) create a new document with the modified, new index values and put the page in the new document.
12. If the **Auto Next Page** option was selected, the next page in the batch will be retrieved and viewed. If not, use the button bar at the bottom of the viewing window to select another page to index.

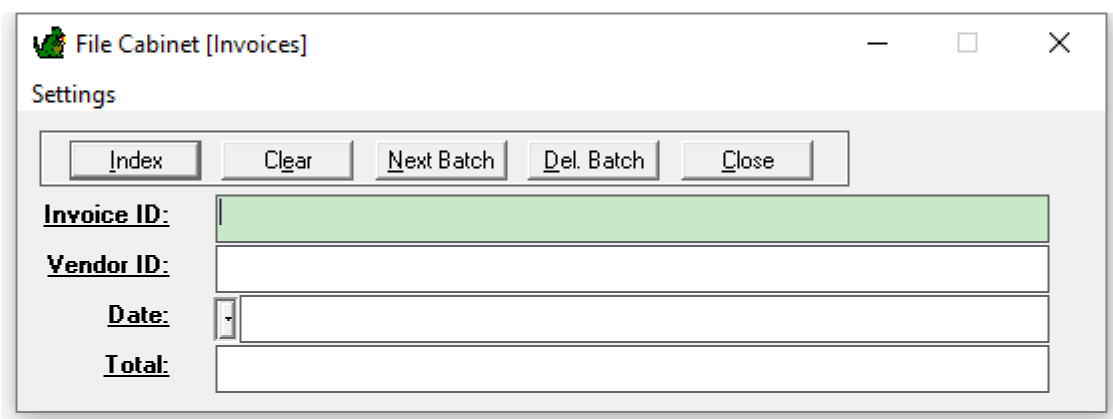
    If the page you indexed was the last in a batch, click the **Next Batch** button to call up the next batch in the bin list. If you have selected the **Auto Select Batch** option, the next batch will display automatically.
13. You may leave the fields filled in to use the index field values from the previous page or batch. Otherwise, click **Clear** to clear all the fields and start from scratch.
14. When you are finished indexing from the current bin to the current file cabinet, click **Close** in the file cabinet grid. This will return you to the **Index a Batch** dialog where you can select a different bin to index from and/or a different file cabinet to index to.
15. When you are done indexing, click **Cancel** to exit the **Index a Batch** dialog.

The Index Form

During indexing, the file cabinet can optionally be opened in a form view (instead of a grid view).

To index using the form view, select the **Form View** option from the **Settings** menu on the **Index a Batch** dialog. When you click **OK** on the **Index a Batch** dialog, the selected file cabinet opens in a form view.

Example:



Index Warnings

There are two indexing-related warnings which can be turned on/off as desired by the user:

- **Index Page(s):** Displays a confirmation dialog after a page (or pages) is indexed.
- **Multiple Indexing:** Displays a warning each time you attempt to index a page (or pages) more than once.

See Change Preferences for more information.

Delete Batch During Indexing

To delete a batch during indexing:

1. Begin the indexing procedure by selecting a bin, batch, and file cabinet from the **Index a Batch** dialog. The file cabinet grid opens.
2. To delete the currently displayed batch, click the **Del Batch** button on the file cabinet grid.
3. If prompted, click **OK** to the "Delete selected batches?" warning. The batch is deleted.

   Depending on your settings, the next batch in the bin may be displayed automatically. If the next batch does not display automatically, click the **Next Bath** button to retrieve the batch.

Index Settings

There are various indexing settings which enable you to adjust the indexing process. For information on the indexing process and its interfaces (the **Index a Batch** dialog and the indexing grid), see Index Batch.

Auto Select vs. Manual Select

Before you begin indexing, in the **Index a Batch** dialog you choose whether you want to select batches automatically or manually during the indexing process.

Auto Select is recommended if you are indexing pages of the batch once and want to automatically move from one page to the next.

Manual Select is recommended if you are indexing pages of the batch multiple times.

Auto Select and **Manual Select** behave the same, except when used in conjunction with the **Auto Next Page** and **Index Whole Batch** indexing settings. Refer to the table below as to how the **Auto Next Page** and **Index Whole Batch** settings affect the behavior of **Auto Select** and **Manual Select**.

Auto Next Page and Index Whole Batch

During the indexing process, in the indexing grid you can choose whether to automatically move from one page to the next or to index a whole batch of pages at once.

Auto Next Page automatically brings up the next page in the batch after the current page is indexed. Do not turn on this setting if you need to index any pages more than once.

Index Whole Batch automatically indexes all the pages in the batch with the same indexing values. This means that all the pages in the batch will become one document in the file cabinet. Do not turn on this setting if any page in the batch requires one or more different index values than other pages in the batch.

If both **Auto Next Page** and **Index Whole Batch** are turned on, **Index Whole Batch** is the dominant setting. Refer to the table below as to how the **Auto Next Page** and **Index Whole Batch** settings affect the behavior of **Auto Select** and **Manual Select**.

INDEXING SETTING	BATCH SELECTION SETTING	
	Auto Select	**Manual Select**
Auto Next Page off **Index Whole Batch off**	The current page is indexed with the entered indexing values. The user remains on the same page.	The current page is indexed with the entered indexing values. The user remains on the same page.
Auto Next Page on **Index Whole Batch off**	The current page is indexed with the entered indexing values. • If the indexed page was not the last page in the batch, the user is automatically moved to the next page in the batch. • If the indexed page was the last page in the batch, the user is automatically moved to the first page in the next batch.	The current page is indexed with the entered indexing values. • If the indexed page was not the last page in the batch, the user is automatically moved to the next page in the batch. • If the indexed page was the last page in the batch, the user remains on the same page.

Auto Next Page off Index Whole Batch on	The current batch (with all its pages) is indexed with the entered indexing values. The user is automatically moved to the next batch.	The current batch (with all its pages) is indexed with the entered indexing values. The user remains on the same page.
Auto Next Page on Index Whole Batch on	The current batch (with all its pages) is indexed with the entered indexing values. The user is automatically moved to the next batch.	The current batch (with all its pages) is indexed with the entered indexing values. The user remains on the same page.

Other Index Settings

Other indexing settings set in the **Index a Batch** dialog, before indexing:

- **Batch Order:** Set the batch order preferences with a primary and secondary sort.
- **Favorite File Cabinets:** Select file cabinets only from your favorite file cabinets list.
- **Favorite Bins:** Select bins only from your favorite bins list.
- **Form View:** The file cabinet will display in the form view instead of the grid view.
- **Show Page Count:** The number of pages in each batch will be displayed in the **Index a Batch** dialog. It is recommended to not display the page count when there are a large number of batches in the selected bin (500 or more).

Other indexing settings set in the indexing grid, during the indexing process:

- **Auto Batch Comment**: Automatically displays batch comments during indexing. The batch comment includes the batch name, bin name, batch ID, and date stamp.
- **Auto Clear Fields**: Automatically clears all index values when the next batch is opened.
- **Auto Next Row**: If indexing into a list of search results, the focus (selection) is automatically moved to the next row down after each index. Do not use this option in combination with **Auto Clear Fields**.
- **First Column Focus**: The focus is returned to the first column in the grid when the next batch is opened.
- **Prepend Pages:** Pages are added at the beginning of the existing document, instead of at the end.
- **Display Comment**: Displays the comment for the open batch.

Index Warnings

There are two indexing-related warnings which can be turned on/off as desired by the user:

- **Index Page(s):** Displays a confirmation dialog after a page (or pages) is indexed.
- **Multiple Indexing:** Displays a warning each time you attempt to index a page (or pages) more than once.

See Change Preferences for more information.

Correct Indexing Mistakes

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

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

Solution: Reindex the document to the proper file cabinet.

To do this:

1. Search the file cabinet to find the document.
2. Select the document and view it in FDD.
3. Click the **Reindex** button on the FDD page control bar. The **Index Into Another File Cabinet** dialog opens.
4. Select the file cabinet you wish to index into from the **Select File Cabinet** list.
5. Check the **Whole Document** and **Delete After Index** options.
6. Click **OK**. The selected file cabinet grid is opened.
7. Enter indexing values for the new document. If the file cabinet into which you are reindexing has any fields in common with the original file cabinet, the document's index values are copied into these fields by default.

   You can also search for an existing document. If an existing document is selected during reindex, the pages will be appended to this document.
8. Click **Index**. The new document is created and you are returned to the original file cabinet grid.

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: Reindex only the pages which were indexed incorrectly.

To do this:

1. Search the file cabinet to find the document.
2. Select the document and view it in FDD.
3. Click the **Reindex** button on the FDD page control bar. The **Index Into Another File Cabinet** dialog opens.
4. Select the file cabinet you wish to index into from the **Select File Cabinet** list.
5. Uncheck the **Whole Document** option and enter a page range in the **From Page...To Page...** fields. Only the pages in this range will be reindexed.
6. Check the **Delete After Index** options.

5. Click **OK**. The selected file cabinet grid is opened.
6. Enter indexing values for the new document. If the file cabinet into which you are reindexing has any fields in common with the original file cabinet, the document's index values are copied into these fields by default.

   You can also search for an existing document. If an existing document is selected during reindex, the pages will be appended to this document.
7. Click **Index**. The new document is created and you are returned to the original file cabinet grid.

Problem: A page was accidentally indexed twice, usually if the Auto Next Page option is not selected.

Solution: Delete the duplicate page from the file cabinet.

To do this:

1. Search the file cabinet to find the document.
2. Select the document and view it in FDD.
3. Use the page select bar to select and view the page that should be deleted.
4. Click the **Delete Page** button on the FDD page control bar.
5. If asked to confirm deletion, click **OK**. The page is deleted from the document.

Problem: A typing mistake or other error caused a document to be indexed incorrectly.

Solution: Modify the index values to correct the error.

To do this:

1. Search the file cabinet to find the incorrectly indexed document.
2. Click the **Modify** button in the file cabinet grid.
3. Change the incorrect index values.
4. Click **OK** to save your changes.

Bookmark Index Values

While indexing, you can create a bookmark to save the index values you have entered in the file cabinet fields. The index bookmark can be used, in a future indexing session, to populate the file cabinet fields with the saved index values.

To bookmark index values:

1. Select the **Index** menu. The **Index a Batch** dialog opens.
2. Select a bin, a file cabinet and a batch, then click **OK**. The selected file cabinet grid opens.
3. Enter index values in the file cabinet fields.
4. Right-click the grid and select **New Bookmarks>Index Values**. The **New Bookmark** dialog opens.
5. Enter a **Title** for the bookmark.
6. Choose the group you want to have **Access** to the bookmark. If you only want yourself to see the bookmark, choose your user instead.
7. Click **OK**. The bookmark is saved.

To use an index bookmark:

1. Select the **Index** menu. The **Index a Batch** dialog opens.
2. Select a bin, a file cabinet and a batch, then click **OK**. The selected file cabinet grid opens.
3. In the **Bookmarks** section on the folder bar, double-click on the desired index bookmark. The saved index values are entered into the file cabinet fields.

To delete a bookmark:

- In the **Bookmarks** section on the folder bar, right-click the bookmark and select **Delete Bookmark**. The bookmark is deleted.

Index from CSV

Index values from a CSV file into a file cabinet. Note that this process creates empty documents without pages (but pages can always be added in a later process if desired).

Tip: See Export Index Values for instructions on how to export index values to a CSV file.

Prepare the CSV File and File Cabinet

Preparation of the CSV file and the file cabinet ensures that the values will be indexed correctly.

To prepare:

- Make sure that the columns in the CSV line up with the fields in the file cabinet. FDD does *not* match the columns and fields by name. FDD simply takes the values from the first column in the CSV and puts them in the first field in the file cabinet, takes the values from the second column in the CSV and puts them in the second field in the file cabinet, and so on. You can reorder the columns in the CSV using a CSV editor, such as Microsoft Excel. You can also reorder the file cabinet fields in FDD using **Column Preferences** (see Reorder and Hide Fields for more information).
- Make sure there are no "merged cells" if you generated the CSV file from Microsoft Excel, which allows you to merge cells in the spreadsheet, so that the values will go into the correct fields in the file cabinet.
- Make sure each row has unique data. When indexing, FDD does not allow a row to be indexed if its index values match an existing row, and FDD will stop.
- Make sure the values in the CSV agree with the settings of the destination file cabinet fields, as configured in Feith Control panel (e.g. field type, length, etc).

Index the Values from the CSV File into the File Cabinet

To index values from a CSV into a file cabinet:

1. In the file cabinet where you want to index the values, right-click in the grid and select **Index New>Documents(Empty) from CSV file**. The **Open** dialog opens.
2. Navigate to and select the desired CSV file. Click **Open**.
3. The values are inserted into file cabinet, each row as a document. Note that the documents are not yet indexed.
4. Review the values and make sure they were inserted correctly.

   If the values were not inserted correctly, you can click **Cancel** to remove the rows, correct any problems, and try again.
5. Once the values are inserted correctly into the file cabinet, click **OK** to index the rows.

   FDD checks the values of each row, making sure they meet the settings configured in Feith Control Panel (e.g. field type, length, etc). FDD then indexes the row as a document.

   If FDD stops due to an invalid index value, correct the index value or cancel the index process. All rows processed before the problematic row will already be indexed in the file cabinet as documents. If you choose to cancel the index process, the problematic row and all rows after it will *not* have been processed.

   If FDD stops due to the row matching the index values of an existing document, change a value on the row so it is not a duplicate or cancel the index process. All rows processed before the problematic row will already be indexed in the file cabinet as documents. If you chose to cancel the index process, the problematic row and all rows after it will *not* have been processed. Note that this can easily happen if you index the CSV more than once, where some of the rows were successfully processed the first time around but there were other rows that had problems and then you indexed the entire CSV again without removing the rows from the CSV file that were successfully indexed as documents the first time around.

If you get in a state where some of the rows were processed and some were not, it may be desirable to delete the documents from the file cabinet that were processed so far from the CSV. That way you won't run into issues with FDD stopping at duplicate rows that match the index values of an existing document, and you will not have to edit the CSV to remove rows that were successfully indexed as documents already.

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.

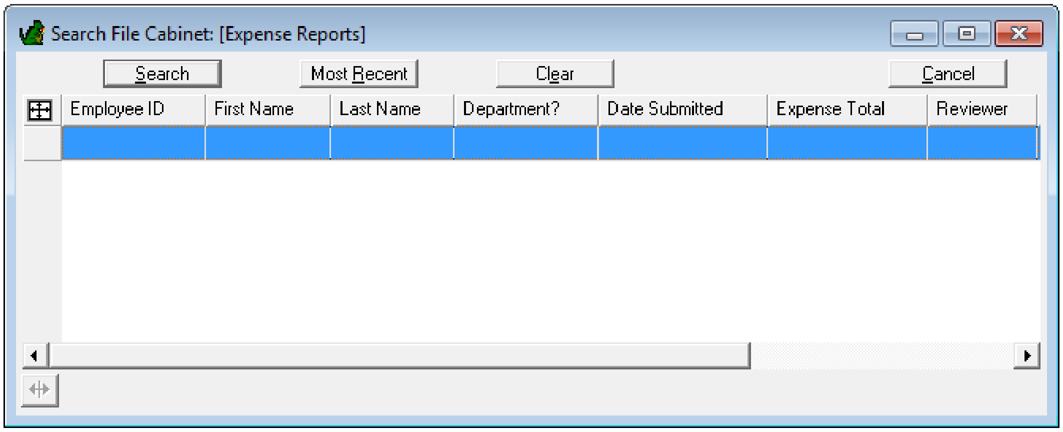
Get started:

- Search for documents
- Search on string values, date values, or number values
- Sort search results
- Bookmark a search
- Find a document based on its pages' text

Search for Documents

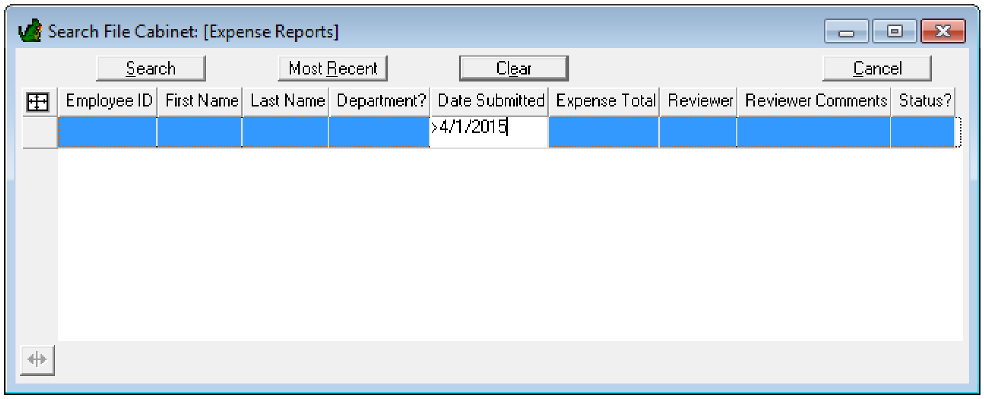
To search for documents:

1. Double-click the desired file cabinet in the folder bar. The file cabinet search grid opens.

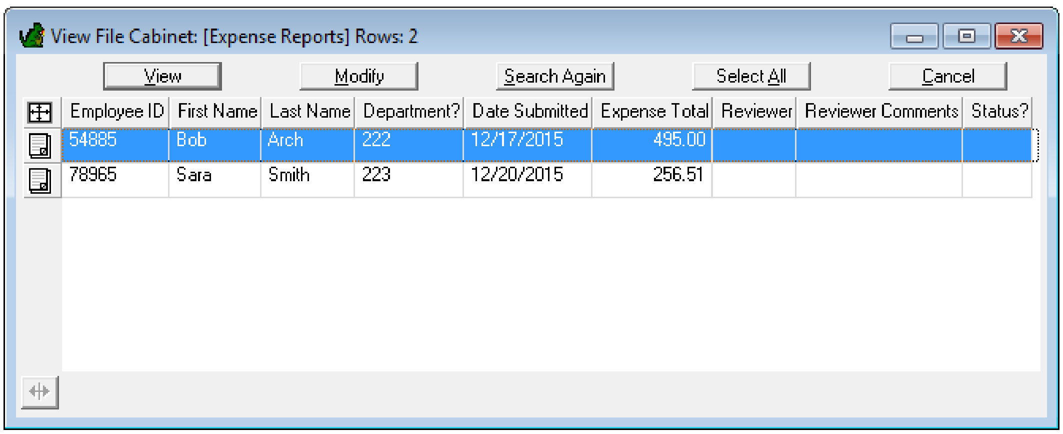


2. Enter search criteria in the file cabinet fields. Double-click a cell to enter text. There are many options for entering index values:

   - Type into the fields.
   - Use the **TAB** key to move from one field to the next.
   - You can make your search very broad by entering few values, or narrow the search by specifying many values. Leave all fields empty to perform a "blank search"; this returns all documents in the file cabinet.
   - Use wildcards, operators, and keywords to help you search on various field types. These can be very helpful when you do not know the exact value to search on. For example, you can search on all Vendors whose names start with **A*** or you can search on all Invoices dated **this month**. See Search on String Values, Search on Date Values, Search on Number Values for more information.
   - If the field has a question mark "?" in the header, right-click the header to choose from a list of suggested values in the **Field Look Up** dialog. Alternatively, you may select a lookup value using the **Dropdown** or **Radio** style. See Lookup Tables for more information.
   - Select from a list of unique values that already exist for that file cabinet field by right-clicking in the field's column and selecting **Distinct Values**. See Distinct Values for more information.
   - If entering multiple values into a list field, enter each value separated by a semicolon or click the  button to add values. See List Fields for more information.
   - Bookmark a search to use it later by right-clicking in the grid and selecting **New Bookmarks>This Search**. Use a search bookmark by double-clicking the bookmark in the folder bar. See Bookmark a Search for more information.
   - Click **Clear** to clear all search criteria.
   - If you enter no search criteria you will perform a "blank" search that will return all documents in the file cabinet. Note that it may take a long time for results to come back for a blank search.



3. Optionally enter search criteria in the **Optional Full Text** field. This feature is available if your FDD system is configured with a full text database. See [Full Text Search] for more information.
4. Click the **Search** button. All documents that match your search criteria are listed in the grid.



Each row in the grid represents one document; the total number of documents is displayed on the grid title bar.

See [View FDD Documents] for instructions on viewing documents.

Note: 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.

Tip: When viewing search results with lookup table values, it may be helpful to turn on color-coding or lookup value description tooltips. See [Lookup Tables] for more information.

5. Optionally click **Search Again** to reset the grid to your last search values. This may be useful if you need to refine your search criteria.

Notes:

- When performing multiple full text searches in a row using the **Optional Full Text** field, use the **ENTER** key to perform one full text search after another quickly. When the results of the full text search are displayed, you can change the criteria entered in the **Optional Full Text** field and hit the **ENTER** key to immediately perform that search (instead of using the **Search Again** and **Search** buttons).
- It is preferable to always use wildcards when searching in a signature field, since FDD regards the whole signature as one string. Therefore, if you want to search for documents signed by **John Smith**, your search criteria would be ***John Smith***.

- Note that a "no folders found; try searching for documents" warning is displayed if the **Folders Only** preference is set and a file cabinet search returns no hits. Likewise, a "no documents found; try searching for folders" warning is displayed if the **Documents Only** preference is set and a file cabinet search returns no hits.

  To set (or remove) the **Folders Only** preference, right-click the file cabinet grid and check (or uncheck) **Preferences**>**Folders Only**.

  To set (or remove) the **Documents Only** preference, right-click the file cabinet grid and check (or uncheck) **Preferences**>**Documents Only**.
- To return all items updated or modified recently, click the **Most Recent** button. It appears next to **Search** in the File Cabinet grid. To search **Least Recent**, hold down the shift key; the Most Recent button will change to Least Recent.

Cross File Cabinet Search

A **Cross File Cabinet** search will perform a search in other file cabinets using the search criteria entered in the current file cabinet. In order for a file cabinet to be considered in the Cross File Cabinet search, it must contain file cabinet fields with the same names as the file cabinet fields that the search criteria are entered into in the original file cabinet.

To do a cross file cabinet search:

1. Open a file cabinet and enter search criteria.
2. Right-click in the file cabinet grid and select **Cross File Cabinet>Search File Cabinets**.
3. A message prompt will inform you of how many file cabinets may contain possible matches. Click **OK** to begin the cross file cabinet search.
4. Each file cabinet that may contain a possible match is opened and searched. The file cabinets with no results are closed. The file cabinets with results remain open.

   You can close all the opened file cabinets at once be right-clicking in the original file cabinet and selecting **Cross File Cabinet>Close File Cabinets**. All file cabinets that opened during the cross file cabinet search will be closed. The original file cabinet remains open.

Tip: Press **ALT**+**B** to hide the file cabinet grid from view (when viewing documents). Press **ALT+B** again to bring the file cabinet grid back to the front.

Search on String Values

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

You can type these in or select some of them from the edit menu:

1. Double click within a cell to enter edit mode.
2. Right click within the cell. The right-click menu displays.
3. Select the desired operator or keyword.

Note: The "not equal to" operators can return unexpected results when combined with wildcards or case-insensitive search.

<table>
<tr><th>WILDCARD, OPERATOR, OR KEYWORD</th><th>DESCRIPTION</th><th>EXAMPLE</th></tr>
<tr><td>*</td><td>The asterisk replaces any number of characters</td><td>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.</td></tr>
<tr><td>?</td><td>The question mark replaces a single character</td><td>Search Jo?n to find values that start with "Jo", have another character, and end with "n", such as John or Joan.</td></tr>
<tr><td>=</td><td>Null</td><td>Search = to find documents where the field is empty, i.e. has no value.</td></tr>
<tr><td>!=</td><td>Not null</td><td>Search != to find documents where the field is not empty, i.e. has a value.</td></tr>
<tr><td>!= [value]
<> [value]</td><td>Not equal to</td><td>Search !=Application or <>Application to find values that are not equal to "Application".</td></tr>
<tr><td>|</td><td>Or</td><td>Search Application|Transcript to find values that are equal to "Application" or "Transcript".</td></tr>
<tr><td>&&</td><td>And
Note: List of strings field only.</td><td>Search Application&&Transcript to find documents that have both values "Application" and "Transcript"</td></tr>
<tr><td>min</td><td>Returns the minimum value
Note: String and signature fields only.</td><td>Search min to find the one value that is the earliest in the alphabet.</td></tr>
<tr><td>max</td><td>Returns the maximum value
Note: String and signature fields only.</td><td>Search max to find the one value that is the latest in the alphabet.</td></tr>
</table>

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.

You can type these in or select some of them from the edit menu:

1. Double click within a cell to enter edit mode.
2. Right click within the cell. The right-click menu displays.
3. Select the desired operator or keyword.

Note: Use keywords with 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 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 **>=1/1/2015<4/1/2015** to find values equal to or after 1/1/2015 and less 4/1/2015. Search **1/1/2015:12/31/2015** to find values greater than or equal to 1/1/2015 and less than or equal to 12/31/2015.
=	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] <> [value]	Not equal to **Note:** Not supported for list of dates field.	Search **!=12/17/2015** or **<>12/17/2015** to find values that are not equal to "12/17/2015".
|	Or	Search **12/17/2015|12/18/2015** to find values that are equal to "12/17/2015" or "12/18/2015"
&&	And **Note:** List of dates field only.	Search **12/17/2015&&12/18/2015** to find documents that have both values "12/17/2015" and "12/18/2015"

today	Date values from today	If today is 5/1/2015, search **today** to find values equal to 5/1/2015.
yesterday	Date values from yesterday	If today is 5/1/2015, search **yesterday** to find values equal to 4/30/2015.
1 day	Date values from today	If today is 5/1/2015, search **1 day** to find values equal to 5/1/2015.
this week	Date values from this week, Monday to Sunday	If today is 5/1/2015, search **this week** to find values greater than or equal to 4/27/2015 and less than or equal to 5/3/2015.
last week	Date values from last week, Monday to Sunday	If today is 5/1/2015, search **last week** to find values greater than or equal to 4/20/2015 and less than or equal to 4/26/2015.
7 days	Date values from the last 7 days, including today	If today is 5/1/2015, search **7 days** to find values greater than or equal to 4/25/2015 and less than or equal to 5/1/2015.
this month	Date values from this month	If today is 5/1/2015, search **this month** to find values greater than or equal to 5/1/2015 and less than or equal to 5/31/2015.
30 days	Date values from last 30 days, including today	If today is 5/1/2015, search **30 days** to find values greater than or equal to 4/1/2015 and less than or equal to 5/1/2015.
last month	Date values from last month	If today is 5/1/2015, search **last month** to find values greater than or equal to 4/1/2015 and less than or equal to 4/30/2015.
90 days	Date values from last 90 days, including today	If today is 5/1/2015, search **90 days** to find values greater than or equal to 1/31/2015 and less than or equal to 5/1/2015.
180 days	Date values from last 180 days, including today	If today is 5/1/2015, search **180 days** to find values greater than or equal to 11/2/2014 and less than or equal to 5/1/2015.
this year	Date values from this year	If today is 5/1/2015, search **this year** to find values greater than or equal to 1/1/2015 and less than or equal to 12/31/2015.

last year	Date values from last year	If today is 5/1/2015, search **last year** to find values greater than or equal to 1/1/2014 and less than or equal to 12/31/2014.
1 year	Date values from today's date last year to today	If today is 5/1/2015, search **1 year** to find values greater than or equal to 5/1/2014 and less than or equal to 5/1/2015.
2 years	Date values from today's date 2 years ago to today	If today is 5/1/2015, search **2 years** to find values greater than or equal to 5/1/2013 and less than or equal to 5/1/2015.
all	Date values from all time	If today is 5/1/2015, search **all** to find all date values.
min	Returns the minimum value **Note:** Not supported for list of dates field.	Search **min** to find the one value that is the earliest date.
max	Returns the maximum value **Note:** Not supported for list of dates field.	Search **max** to find the one value that is the latest date.

Search on Number Values

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

You can type these in or select some of them from the edit menu:

1. Double click within a cell to enter edit mode.
2. Right click within the cell. The right-click menu displays.
3. Select the desired operator or keyword.

OPERATOR OR KEYWORD	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] <> [value]	Not equal to	Search **!=1000** or **<>1000** to find values that are not equal to "1000".
|	Or	Search **1000|2000** to find values that are equal to "1000" or "2000"
&&	And **Note:** List of numbers field only.	Search **1000&&2000** to find documents that have both values "1000" and "2000"

min	Returns the minimum value **Note:** Not supported for list of numbers field.	Search **min** to find the one value that is the lowest number.
max	Returns the maximum value **Note:** Not supported for list of numbers field.	Search **max** to find the one value that is the highest number.

Sort Search Results

Order your search results by sorting them. You can sort search results ascending or descending. A file cabinet field sorted in ascending order has a blue column header. A file cabinet field sorted in descending order has a red column header.

Single Column Sort

The results of a search can be sorted by any column in the file cabinet.

To sort on a field:

1. Click on the column header. The column header changes color to indicate an ascending (blue) or descending (red) sort order.

   Note: The initial sort order (ascending vs. descending) on a file cabinet field differs depending on the field type. If string, the initial sort order is ascending. If any other field type (e.g. date, decimal, integer, etc), the initial sort order is descending.
2. Click the column header a second time to reverse the sort order (e.g. change from an ascending sort to a descending sort).

After sorting search results, the next time you open the file cabinet and search, FDD remembers the last-selected, first-level sort and applies it to the search results.

You may click the header again to turn off sorting.

Tip: After sorting a column, you can hit a letter or number key on your keyboard to jump down in the list to the first row that begins with that letter or number. E.g. hit the "M" key to jump down to the results that start with "M."

Multi Column Sort

To multi column sort:

1. Click on the column header of the first column to be sorted. The column header changes color to indicate an ascending (blue) or descending (red) sort order.
2. Click on the second column header. The column header changes color to indicate an ascending (blue) or descending (red) sort order; however, the color is a lighter shade to indicate that the column is the secondary sort.
3. Continue to click column headers to increase the number of columns used in your sort. Multi column sort works best on five or less columns. This feature requires a minimum display setting of High Color (16 Bit) to discern color differences.

After sorting search results, the next time you open the file cabinet and search, FDD remembers the last-selected, first-level sort and applies it to the search results.

You may click the headers again to turn off sorting.

Note: Sorting is disabled on list fields.

Bookmark a Search

While searching, you can create a bookmark to save the search criteria you have entered in the file cabinet fields and/or the **Optional Full Text** field. You can use the search bookmark at a later time to search the file cabinet with the saved search criteria.

Search bookmarks are useful for saving complex searches.

To bookmark a search:

1. Open the file cabinet grid.
2. Enter search criteria in the file cabinet fields and/or the **Optional Full Text** field.
3. Right-click the grid and select **New Bookmark>This Search**. The **New Bookmark** dialog opens.
4. Enter a **Title** for the bookmark.
5. Choose the group you want to have **Access** to the bookmark. If you only want yourself to see the bookmark, choose your user instead.
6. Click **OK**. The bookmark is saved.

To use a search bookmark:

- In the **Bookmarks** section on the folder bar, double-click the desired search bookmark. The bookmarked search is performed and documents matching the search criteria are listed in the file cabinet grid.

To delete a bookmark:

- In the **Bookmarks** section on the folder bar, right-click the bookmark and select **Delete Bookmark**. The bookmark is deleted.

Advanced Search

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

To construct an advanced search query:

1. Right-click the file cabinet grid and select **Advanced Search** to open the **Advanced Search** dialog.
2. In the **Search Term** section, use the drop-down lists to choose a **Field**, **Operator** and **Value**.

   Note: Advanced Search does not support searching in **List of Dates** fields, nor use of wildcards in **List of Strings** fields.

   Field: Available fields include all fields in the file cabinet plus the following document attributes.

   - **Document Permission:** The document permissions template (e.g., "**Public Access**") assigned to the document. Document permission templates are defined in the Feith Control Panel.
   - **Document ID**: The unique ID number automatically assigned to the document when it was created.
   - **Document Creation Time**: The date and time the document was created.
   - **Page ID**: The unique ID number automatically assigned to a page when it was created.
   - **Page Creation Time:** The date and time the page was created.
   - **Document Created By:** The user who created the document. (You can only search on documents created by your user or the "cold" user.)
   - **Document Note Author**: The user who created a document note.
   - **Page Created By:** The user who created the page. (You can only search on documents created by your user or the "cold" user.)
   - **Page Inserted By:** The user who inserted the page into the document. (You can only search on documents created by your user or the "cold" user.)
   - **Page Note Author**: The user who created a page note.
   - **Page Size:** The size of the page in bytes.
   - **Category Name:** The name of the RMA category assigned to the document.
   - **Category Identifier:** The category identifier of the RMA category assigned to the document.
   - **Document State:** The document state applied to the document (e.g. Frozen).
   - **Current Classification:** The RMA classification of the document (e.g. Confidential).
   - **Supplemental Markings:** The RMA supplemental markings assigned to the document.

   Operator: Available operators include:

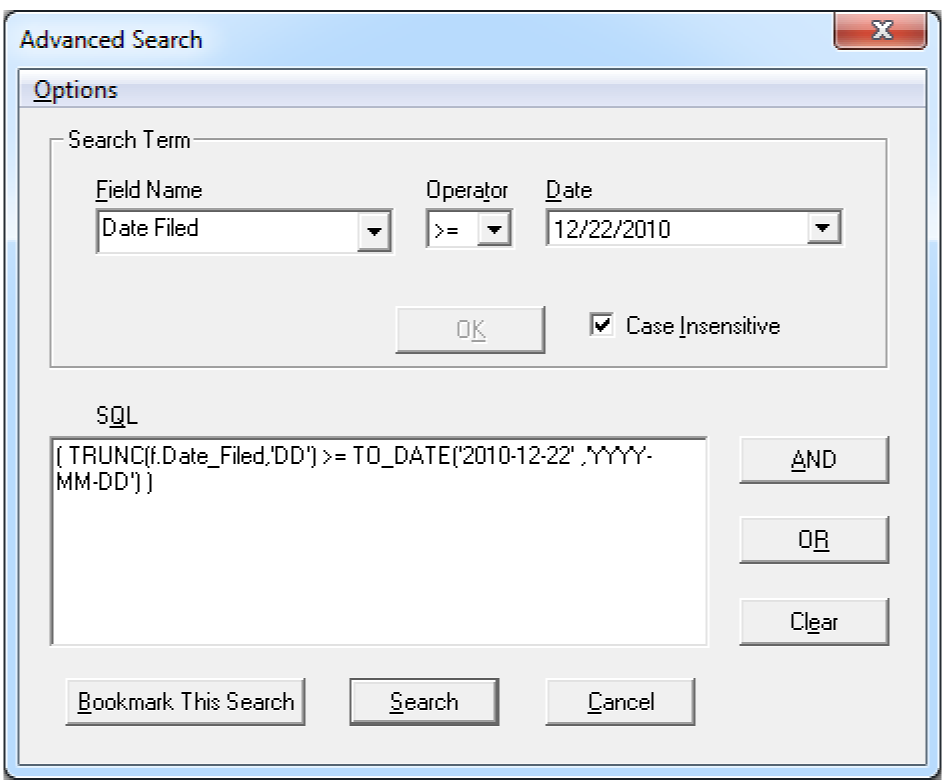
=	equal to
<>	not equal to
>	greater than
>=	greater than or equal to
<	less than
<=	less than or equal to

is null	is null
is not null	is not null
in	in (list of values)
not in	not in (list of values)

Value: The **Value** list may be populated with choices:

- If you are searching on a file cabinet field with a lookup table and the **Enable Lookup Tables** option is selected under the **Options** menu, the lookup values appear in the **Value** list.
- If you are searching on a file cabinet field that is indexed and the **Enable Distinct Values** option is selected under the **Options** menu, the distinct values appear in the **Value** list.
- If you are searching on a date file cabinet field, a date selection control opens when click the down arrow in the **Value** field.
- If you are searching on **Document Creation Time** or a datetime file cabinet field, the **Value** field displays as a date and time selection control.
- If you are searching on **Document Permission**, the **Value** field lists all document permission templates to which you are assigned.

3. Click **OK**. The search term is added under the **SQL** section. Optionally add to the query by clicking either **AND** or **OR** and specifying another search term.



4. Click **Search** to perform the search. Results are displayed in the file cabinet grid.

Advanced Search and Full Text Search

To combine a full text search with advanced search, enter the full text search criteria in the file cabinet grid, then open the **Advanced Search** dialog and enter the advanced search criteria. (Full text searching requires a full text database. See Full Text Search Overview for more information.)

Bookmark an Advanced Search

To bookmark an advanced search:

1. Open the **Advanced Search** dialog
2. Enter the advanced search criteria.
3. Click **Bookmark This Search**.
4. Enter a **Title** for the bookmark.
5. Choose the group you want to have **Access** to the bookmark. If you only want yourself to see the bookmark, choose your user instead.
6. Click **OK**. The bookmark is saved.

To use the bookmark:

- In the **Bookmarks** section on the folder bar, double-click the desired advanced search bookmark. The bookmarked search is performed and documents matching the search criteria are listed in the file cabinet grid.

Note: Any search criteria entered in the file cabinet grid (with the exception of optional full text search criteria) is ignored when an advanced search is performed.

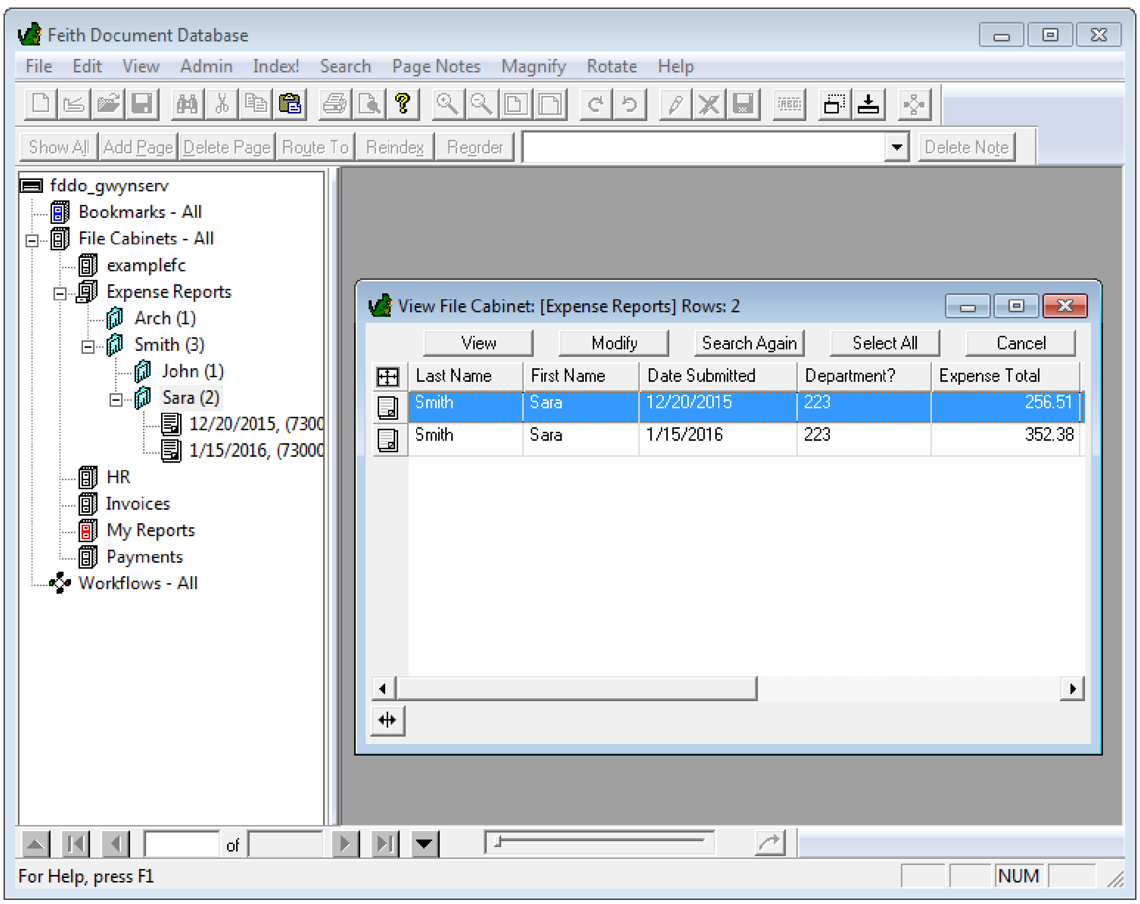
Drill Down Search

The **drill down by distinct values** search capability provides a browsing style navigation of FDD documents as an alternative to structured and full text searches. This feature is useful in combination with the reordering and hiding of file cabinet fields. See Reorder and Hide Fields for more information.

To browse documents using drill down search:

1. Double-click the file cabinet icon on the folder bar. The file cabinet grid opens.
2. Double-click the file cabinet icon on the folder bar a second time. A list of blue folders displays on the folder bar underneath the file cabinet icon. A folder is displayed for each distinct value in the first column in the file cabinet grid.

   You can limit the initial drill-down by right-clicking the file cabinet and selecting **Open/Search For** and drilling down based on specific search criteria (e.g. "Smith" or "S*")
3. To continue drilling down, double-click one of the blue folders. A second list of blue folders displays beneath the opened folder.
4. At any time in the drill down search, you can right-click on a folder and select **Get Documents** to retrieve the documents in the file cabinet grid.

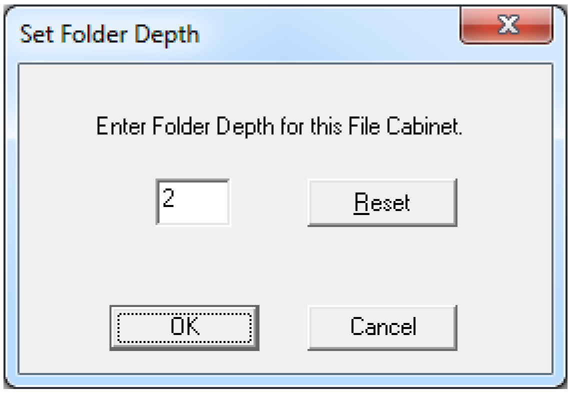


Set Folder Depth

You can set the folder depth per file cabinet for drill down searching. The default folder depth is equal to the number of fields in the file cabinet.

To set the folder depth for a file cabinet:

1. Right-click on the desired file cabinet in the folder bar.
2. Select **Set Folder Depth**. The **Set Folder Depth** dialog opens.
3. Enter the depth (number of folders) you want to view when drill down searching. The **Reset** button will set the folder depth to the default.



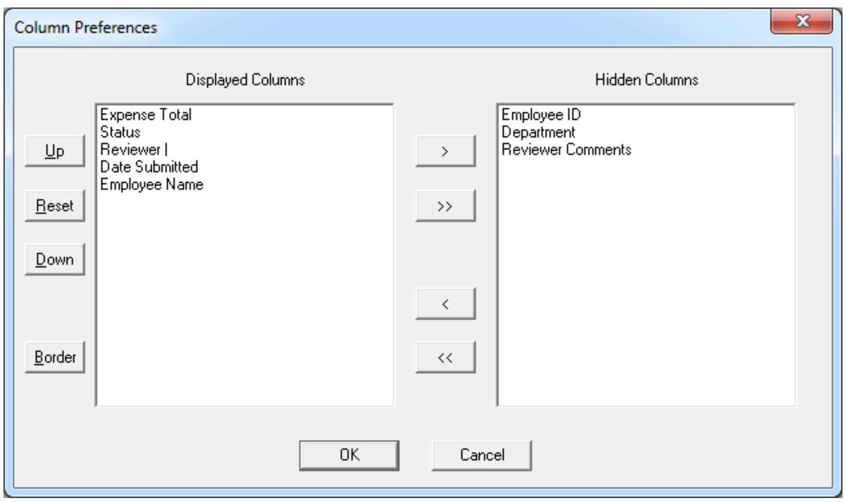
4. Click **OK**.

Reorder and Hide Fields

You can reorder and hide file cabinet field columns in the file cabinet grid. Reordering and hiding fields is a user preference and is saved per workstation. This feature may be useful in combination with drill down searching. See Drill Down Search for more information.

To reorder and hide fields:

1. Right-click the file cabinet grid and select **Preferences**>**Column Preferences**. The **Column Preferences** dialog opens, with all fields included in the **Displayed Columns** list by default.
2. To reorder fields, use the **Up** and **Down** buttons to change the order in the **Displayed Columns** list. The fields are listed top to bottom in the order that they will display left to right in the file cabinet grid.
3. To hide a field, use the right arrow button to move the field from the **Displayed Columns** list to the **Hidden Columns** list. This can be reversed by using the left arrow button to move the field from the **Hidden Columns** list to the **Displayed Columns** list.
4. To add a thick border to the right of a column, select the column to which you want to add a border and click the **Border** button. a **|** will appear next to the column name to indicate the existence of a border.



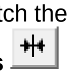
5. Click **OK**. Your column preferences are applied to the file cabinet grid.

Reset Columns

You can either temporarily or permanently reset the columns to their original state:

To temporarily reset the columns:

1. Perform a search in the file cabinet grid.
2. Click the **Reset Columns**  button. The columns are reset to their original state.

   You can switch the columns back to the preferences you set by clicking the **Use Column Preferences**  button.

To permanently reset the columns:

1. Right-click the file cabinet grid and select **Preferences**>**Column Preferences**.
2. Click the **Reset** button. The columns are reset to their original state.

Full Text Search

Full Text Search Overview

Note: These instructions refer to the optional products Elasticsearch, Autonomy IDOL, 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 you search

Manually Add Full Text Data

An administrator configures bins and file cabinets to automatically add data to the full text database in Feith Control Panel.

Alternatively, you can manually add data to the full text database in FDD, which is helpful when testing or troubleshooting your full text configuration.

To manually add data to the full text database:

- In the folder bar, right-click on a batch or document and select **UTR>Add**.
- In a file cabinet, right-click a document and select **UTR>Add**.

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 Elasticsearch, Autonomy IDOL, 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:

- Global Full Text Search
- Full Text Search in Specific File Cabinet
- Text Search Settings

Global Full Text Search

To perform a global full text search:

1. In the **Search** menu, select **Full Text**. The **Full Text Search** dialog opens.
2. Enter search criteria in the **Enter Text Query** field.

   The search query can be either a word or phrase and can include supported operators and keywords. See ES Search Techniques or IDOL Search Techniques for more information.
4. Click **Search**. A list of bins and file cabinets containing matching documents displays.

   If using Autonomy IDOL, in the **See Also** field is a list of suggested search terms to help you narrow down your search. To add a term to your search criteria, double-click the desired term. The term is added to your search criteria, click **Search** again to re-perform the search. (Elasticsearch does not support See Also.)
5. Select a bin or file cabinet to view the list of matching documents.
6. Double-click on a bin or file cabinet to view a list of matching documents.

   View a document by selecting it in the grid and then clicking **View**. The first page with a hit from the search criteria is displayed.

   Find the text you are looking for:

   - Double-click  to view the full text hits with your criteria words highlighted in red. In this dialog, hit **CTRL+F** to find your text.
   - If using Autonomy IDOL, use the **Next Hit**  button on the **Page Bar** to jump to pages with hits. (Elasticsearch does not support the Next Hit button.)
   - Select **Edit>Find** to find your text.

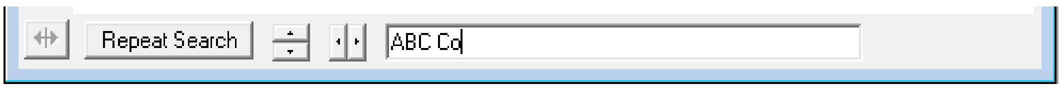
Full Text Search in Specific File Cabinet

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

1. Open a file cabinet.

   Note: You can only search in file cabinets that are configured by your administrator to be full text indexed. The administrator may also have disabled full text searching on some virtual file cabinets.
2. Enter search criteria in the full text field at the bottom of the file cabinet grid.

   The search query can be either a word or phrase and can include supported operators and keywords. See ES Search Techniques or IDOL Search Techniques for more information.

3. Optionally enter additional search criteria in the file cabinet fields.
4. Click the **Search** button. All documents that match the search criteria are listed in the grid.

   View a document by selecting it in the grid and then clicking **View**. The first page with a hit from the search criteria is displayed.

   Find the text you are looking for:

   - Double-click  to view the full text hits with your criteria words highlighted in red. In this dialog, hit **CTRL+F** to find your text.
   - If using Autonomy IDOL, use the **Next Hit**  button on the **Page Bar** to jump to pages with hits. (Elasticsearch does not support the Next Hit button.)
   - Select **Edit>Find** to find your text.

Tip: If you find that results come back slowly when doing a combined full text and file cabinet field search, try turning on **Documents Only** in the file cabinet **Preferences** under the right-click menu. This will return documents only for your searches and may improve speed. Folders will not be returned, but that will not matter if you do not use folders.

Text Search Settings

Adjust the full text search settings to suit your needs. Some settings apply to only Elasticsearch, only Autonomy IDOL, or both.

SETTING	ELASTICSEARCH	AUTONOMY IDOL
Maximum Search Results The maximum number of hits returned in the search results. On Elasticsearch, hits are counted by document. On Autonomy IDOL, hits are counted by page.	✓	✓
Word Proximity (Slop) How far apart words are allowed to be while still considering the document a match. Applies to ES Simple Search only.	✓	✗
Boost A document with all the words in the given order is ranked higher or "boosted" to the top of the results. Applies to ES Simple Search only. "1" is considered a "neutral" boost, so enter a number higher than 1. For example, "2" implies that a document with all the words in order is about twice as important as the other documents.	✓	✗
Search Timeout (sec) Amount of time (in seconds) that the IDOL search continues before it times out.	✗	✓
Fast Search Turn on to bring results back faster. Results are possibly inaccurate for virtual file cabinets and document level permissions. Counts are not shown. Turn off to bring back accurate results, even if it takes more time. Results are accurate with regard to virtual file cabinets and document level permissions. Counts are shown.	✓	✓
AQG Cluster Groups related **See Also** terms suggested by IDOL.	✗	✓
HTML Results IDOL results are displayed in an HTML format instead of the grid.	✗	✓

Try Harder and What Else

Note: These instructions refer to the optional product Elasticsearch.

If your system is configured for Elasticsearch, you can ask FDD to do another "fuzzier" search to try and find the documents you need. This is done using the **Try Harder** and **What Else You Got** buttons.

Tip: These buttons employ ES search techniques that you can learn and type in yourself, without using the buttons. Learning techniques like this will help you do more sophisticated searches to find the documents you need. See ES Search Techniques for more searches you can try.

Try Harder

To do a "try harder" search:

1. Do a full text search in a specific file cabinet. The search results display but the documents you want are not in the search results. See Perform Full Text Search for more information.

2. Click the **Try Harder** up arrow button. FDD tweaks the search criteria, trying to find other documents.

   For example, if your original search was for the word **Smith**, the What Else You Got search would look for **Smith~1**. This is an ES search technique that looks for words that are one letter different from **Smith**. So it would find words like **Smithe** or **Smyth**.

3. Click **Repeat Search**. The search results display.

4. If the search results are still missing some documents you need, you can click the **Try Harder** up arrow button again and click **Repeat Search**. The search will broaden to look for more words.

   For example, **Smith~2** will look for words that are two letters different from **Smith**.

What Else You Got

To do a "what else you got" search:

1. Do a full text search in a specific file cabinet. The search results display but the documents you want are not in the search results. See Perform Full Text Search for more information.

2. Click the **What Else You Got** right arrow button. FDD tweaks the search criteria, trying to find other documents.

   For example, if your original search was for the word **Smith**, the What Else You Got search would look for **(Smith~1 AND NOT Smith)**. This is an ES search technique that does the following:

   - The first part **Smith~1** looks for words that are one letter different from **Smith**. So it would find words like **Smithe** or **Smyth**.
   - The second part **AND NOT Smith** removes the documents that came back for your previous search, assuming those were not the documents you wanted.

3. Click **Repeat Search**. The search results display.

4. If the search results are still missing some documents you need, you can click the **What Else You Got** right arrow button again and click **Repeat Search**. The search will broaden to look for more words.

   For example, **(Smith~2 AND NOT Smith~1)** will look for words that are two letters different from **Smith** and exclude the previous search, assuming those were not the documents you wanted.

ES Search Techniques

Note: These instructions refer to the optional product Elasticsearch.

If your system is configured for Elasticsearch, you can use keywords, wildcards, and other techniques to refine your searches. Also, you should be aware of specific ES behaviors, such as case-insensitivity and stemming. Refer to the Elasticsearch documentation for more information on searching in ES. Contact Feith Support if you need assistance with the Elasticsearch documentation.

Simple Search with Smart Ranking

If you type in a word or multiple words without any operators or keywords, FDD will perform a "google-style" search, returning documents that contain any of the words then ranking the documents intelligently so the most relevant documents are at the top. For example, if you search on a full name like **John James Smith**, documents with his full name will be at the top and documents with **John Smith** or just **John** will be ranked lower.

You can tweak the settings of this kind of search by adjusting the **Word Proximity** and **Boost** settings in the Text Search Settings. See Text Search Settings for more information.

Note: Sorting a column will override Elasticsearch's intelligent ranking. See Sort Search Results for more information on sorting and how to turn it off.

Case-Insensitivity

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

Words and Phrases

ES 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 Wildcards

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**.
*****	Indicates zero or more of any 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**.
word~N	Finds documents that are similar to your search term by the specified number of characters. For example, **cat~1** will return **hat** and **cart**. The search **cat~2** will return **cow** and **cater**. **Note:** You can only do a fuzzy search that is up to two characters different. If you try to do more, ES will just do a **~2** fuzzy search.
"*word1 word2*" ~*N*	Find documents that have the words in close proximity to each other based on the specified number of words they can be apart. For example, **"fox dog"~4** will return **the quick brown fox jumps over the lazy dog**, but **"fox dog"~3** would not.
word1* AND *word2^N	Boosts results to the top of the list for a given word you consider more important. For example, just searching **radio AND television** will return the documents in the order that ES thought reasonable. To boost results that emphasize "television" to the top, use the query **radio AND television^2**.

Notes:

- A keyword must be entered in all capital letters to be recognized.
- Refer to Elasticsearch documentation for other keywords.

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.

IDOL Search Techniques

Note: 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. Contact Feith Support if you need assistance with the Autonomy IDOL documentation.

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 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. Contact Feith Support if you need assistance with the Autonomy IDOL documentation.

View Documents

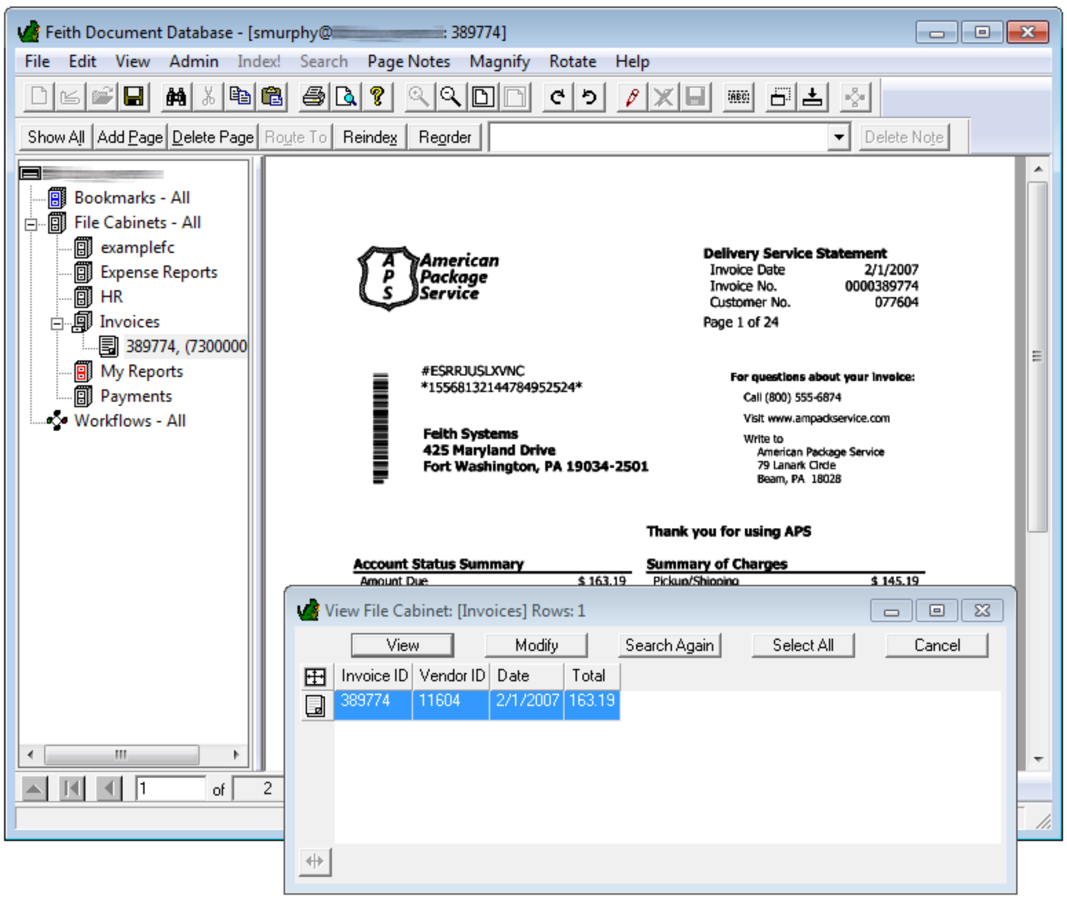
View FDD Documents

View a Single Document

To view a document:

- Highlight the row of the document in the file cabinet window and click **View**.
- Double-click on the document icon to the left of the document row in the file cabinet window.
- Right-click the document (or batch) on the FDD folder bar and select **Open**.

While viewing a document, hit the **Next Document**  or **Previous Document**  buttons on the **Page Bar** to navigate up and down the list of documents.



When viewing a document, it may be desirable to move the file cabinet grid out of the way.

To get the file cabinet grid out of the way:

- Hide the grid using the  toolbar button or the keyboard shortcut **ALT+B**. Use the same process to bring the grid back. You can also turn on the **Auto Hide Grid** preference to automatically hide the grid when you view a document.
- Shrink the grid using the  toolbar button or the keyboard shortcut **ALT+N**. Use the same process to move the grid back. You can also turn on the **Auto Shrink Grid** preference to automatically shrink the grid when you view a document.

View Multiple Documents

To view two or more consecutive documents:

1. Open a file cabinet and search for documents. (See Search for Documents for instructions.)
2. Click on the row of the first document you want to view. Hold down the **SHIFT** key and click on the row of the last document you want to view. The selected rows are highlighted in the file cabinet grid.
3. Click **View** to display the pages of the selected documents. The selected rows are now marked with a pale blue background in the file cabinet grid; as you page through the documents, the row of the currently displayed document is highlighted.

To view two or more non-consecutive documents:

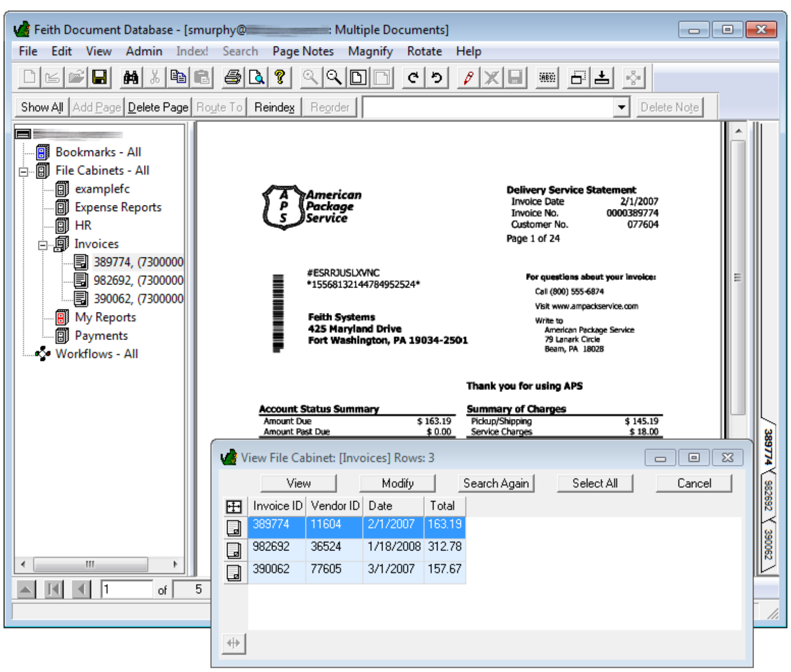
1. Open a file cabinet and search for documents.
2. Click on the row of the first document you want to view. Hold down the **CTRL** key and click on the row of each other document you want to view. The selected rows are highlighted in the file cabinet grid.
3. Click **View** to display the pages of the selected documents. The selected rows are now marked with a pale blue background in the file cabinet grid; as you page through the documents, the currently displayed document is highlighted.

To view all of the documents returned by a search:

1. Open a file cabinet and search for documents.
2. Click **Select All**. All rows are highlighted in the file cabinet grid.
3. Click **View** to display the pages of the selected documents. The selected rows are now marked with a pale blue background in the file cabinet grid; as you page through the documents, the currently displayed document is highlighted.

   Each document is marked with a tab; tabs are listed on the right-hand side of the view window. The tab labels are values from a file cabinet field. You can choose which file cabinet field to use as the auto-tab label in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

You can also select multiple documents on the FDD folder bar, right-click, and select **Open** to display multiple documents.



Select a Page

Once you have selected documents for viewing, the **Page Bar** buttons are used to move from one page to another. To display the page bar, select **Page Bar** from the **View** menu.

The number on the left is the page which you are on currently. The number on the right is the total number of pages in the document.

You can move between pages in the document using the left and right arrow buttons. You can also use the **Page Down** key to move forward one page in the document, and the **Page Up** key to move back one page in the document. You may need to click once on the page in the FDD screen to use the **Page** keys to move through the document.

To skip forward to a specific page:

1. Highlight the number on the left.

2. Type the number of the page you want to go to.

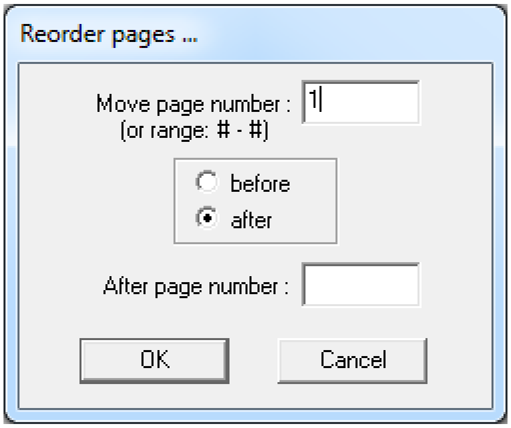
3. Hit **ENTER**. You are taken to the entered page.

Tip: The up and down arrow buttons are used to navigate documents in the list. See [View FDD Documents] for more information.

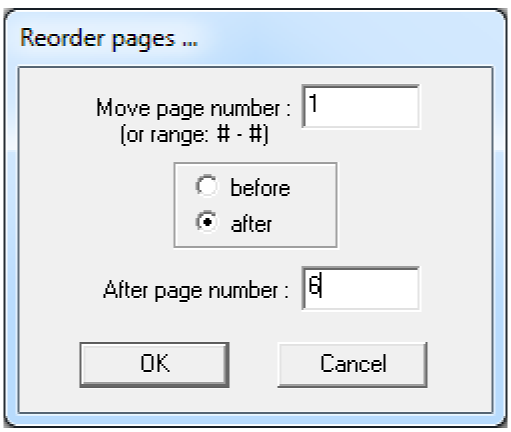
Reorder Pages

Use the reorder function to rearrange pages within a document.

1. View a document.
2. Click the **Reorder** button in the **Page Control Bar** at the top of the FDD screen. The **Reorder Pages** window opens.
3. In the **Move page number** field, type the number of the page you want to re-order.



4. Select whether to insert the selected page **before** or **after** another page.
5. In the **Before/After page number** field, type the number of the page that the other page will be moved next to (whether **before** or **after**).



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

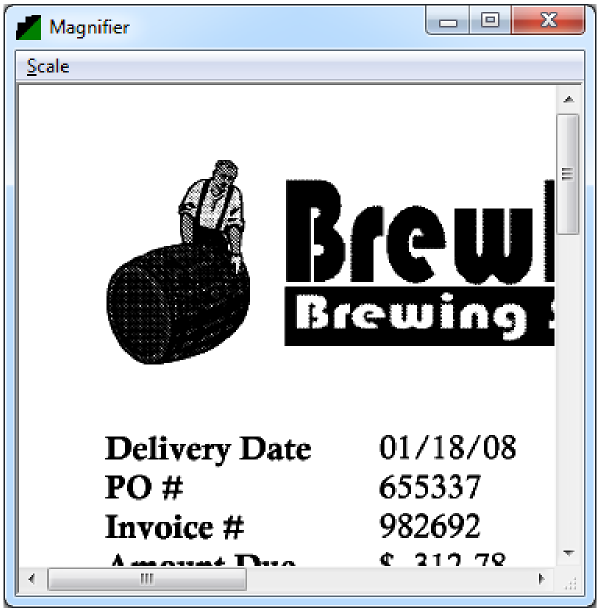
Note: This feature cannot be used while viewing multiple documents.

Magnify a Page

The **Magnify** option allows you to zoom in on a portion of a document to view it in greater detail. It works like a magnifying glass, enlarging document images within a window as you drag your mouse over them. Magnify can only enlarge image pages (not text or GOS pages).

To magnify an image, follow these steps:

1. Make sure that the document you wish to magnify is displayed in the FDD main window.
2. Click to open the **Magnify** menu. The **Magnifier** window opens:



3. If the **Magnifier** window does not appear, click the left mouse button to bring it to the front.
4. If the **Magnifier** window covers the image, resize or move it so that you can view the entire document.
5. Place the mouse pointer on the part of the original image that you want to magnify and press and hold down the left mouse button.
6. The area you select will be displayed in the **Magnifier** window. By holding down the left mouse button and moving the pointer around the original image, you can change the area that is shown in the **Magnifier** window. When you have selected the area you wish to enlarge, release the mouse button.

To make the magnified image bigger or smaller:

1. From the **Magnifier** window, select **Scale**, then select a scale of magnification. The magnified image is redisplayed at the selected scale.
2. To save the scale selection, select **Save Preference** from the **Scale** menu.

To keep the magnifier on permanently:

1. From the **Admin** menu, select **Preferences**, then select **Misc**.
2. Select the **Magnifier Stays ON** option.
3. Click **OK** to save your changes.

Rotate a Page or Document

Use the rotation options to rotate image pages. This may be useful if pages are scanned into FDD upside-down. Rotation can be done when viewing or indexing pages. Once the pages are rotated, they are stored with the new rotation and re-displayed.

To rotate a page using the Rotate Page menu options:

1. Display the page.
2. From the **Rotate** menu, select **Rotate Page.**
3. From the submenu, select **90° Right**, **180° Flip** or **90° Left**.

To rotate a page using the rotate toolbar buttons:

1. Display the page.
2. Click one of the rotate toolbar buttons:  (rotates 90° right) or  (rotates 90° left).

To rotate a document:

1. Display the document.
2. From the **Rotate** menu, select **Rotate Document.**
3. From the submenu, select **90° Right**, **180° Flip** or **90° Left**.

Bookmark a Page

While you have an image displayed in FDD, you can create a bookmark to the page. The next time you use FDD, you can go directly to the document you were working on by viewing the bookmarked page.

To bookmark a page:

1. Display a page in FDD.
2. Right-click on the page and select **New Bookmark**. The **New Bookmark** window opens.
3. Enter a **Title** for the bookmark.
4. Choose the group you want to have **Access** to the bookmark. If you only want yourself to see the bookmark, choose your user instead.
5. Click **OK**. The bookmark is saved.

To view a bookmarked page:

- In the **Bookmarks** section on the folder bar, double-click the desired view bookmark. The bookmarked page displays.

To delete a bookmark:

- In the **Bookmarks** section on the folder bar, right-click the bookmark and select **Delete Bookmark**. The bookmark is deleted.

View General Objects

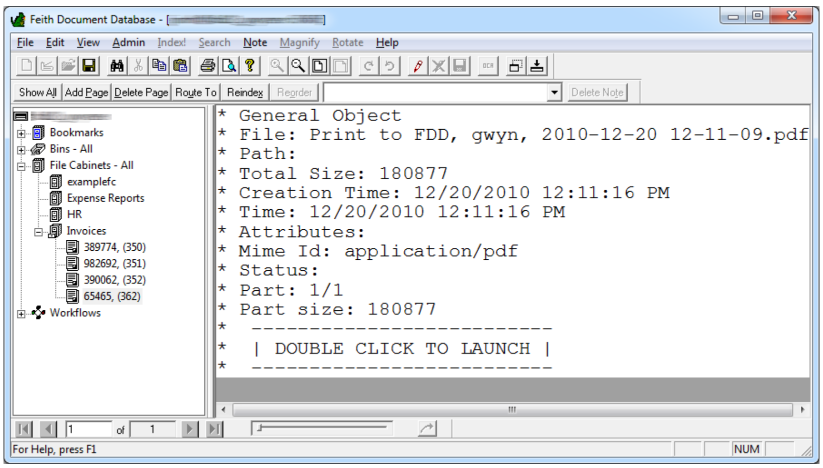
General Objects (GOS) are Windows-type electronic files stored in FDD, such as word-processing documents or spreadsheets.

Tip: If you want to convert a text or image GOS page to the native FDD format, see Convert Page from GOS for more information.

View GOS Pages

To view a GOS page:

1. View the GOS page in FDD. The GOS header displays in the FDD window, displaying information including the file name. The GOS header looks like this:



2. Double-click the page. The GOS page is launched in the application that is associated with its file type in Windows. This might be the application that was used to create the file (e.g., Microsoft Word™ for a word-processing document) or a third-party viewing application.

Note that GOS files with executable extensions (.exe, .com, .bat, .pif, .scr, .dll) are not launched from FDD.

Display GOS as OLE

The **Display GOS as OLE** option forces FDD to attempt to automatically display GOS objects inside the FDD window.

To enable the automatic GOS display:

1. From the **Admin** menu, select **Preferences**. The **Preferences** window opens.
2. Select the **Auto Display** tab.
3. Check the **Display GOS as OLE** option.
4. Optionally check the **Full PDF Reader** option. The **Full PDF Reader** option is recommended if you are viewing PDF files with Adobe Reader 7 or newer.

   Note: If a PDF is still not viewable with this option turned on, confirm the **Display PDF in browser** setting is turned on in Adobe.
5. Click **OK** to save the preferences.

   Note that when a GOS is displayed as an OLE, you can launch it in its associated application. To do this, view the page then hold down the **CTRL** key and double-click the page.

View COLD Document

Note: These instructions refer to the optional product FDD COLD.

COLD pages are stored in FDD as text only, although they often contain information that is printed in a form with lines and other graphics. FDD allows you to associate the text page with an overlay image, which makes the page appear as it would in printed form. For more information on COLD, see Optional Components. For more information on overlays, see Overlays.

Search for a COLD document as you would any other type of document, using a file cabinet search. You can move through the pages of a document as you would a multi-page scanned document, using the arrow buttons or the **Page Up** and **Page Down** keys.

Because COLD reports often have many pages, looking for specific information in those reports can be tedious and time-consuming. Use the **Find** option to search for any string of characters embedded in the reports.

To use **Find** to search for text in a COLD report:

1. Display the COLD report in FDD.
2. Select **Find** from the **Edit** menu. The **Find** dialog opens.
3. Type your search criteria in the **Find What** text box.

   Check the **Match Case** option to perform a case-sensitive search.

   Select the **Down** option to search forward in the document from the current page. Select the **Up** option to search backwards.
4. Click the **Find Next** button to begin searching.
5. Click the **Find Next** button to find the next occurrence of the search value.

If your search criteria is found in the document, the word(s) is highlighted. If your search criteria cannot be found in the document, the message "No Occurrence Found" displays.

View Document in New Image Window

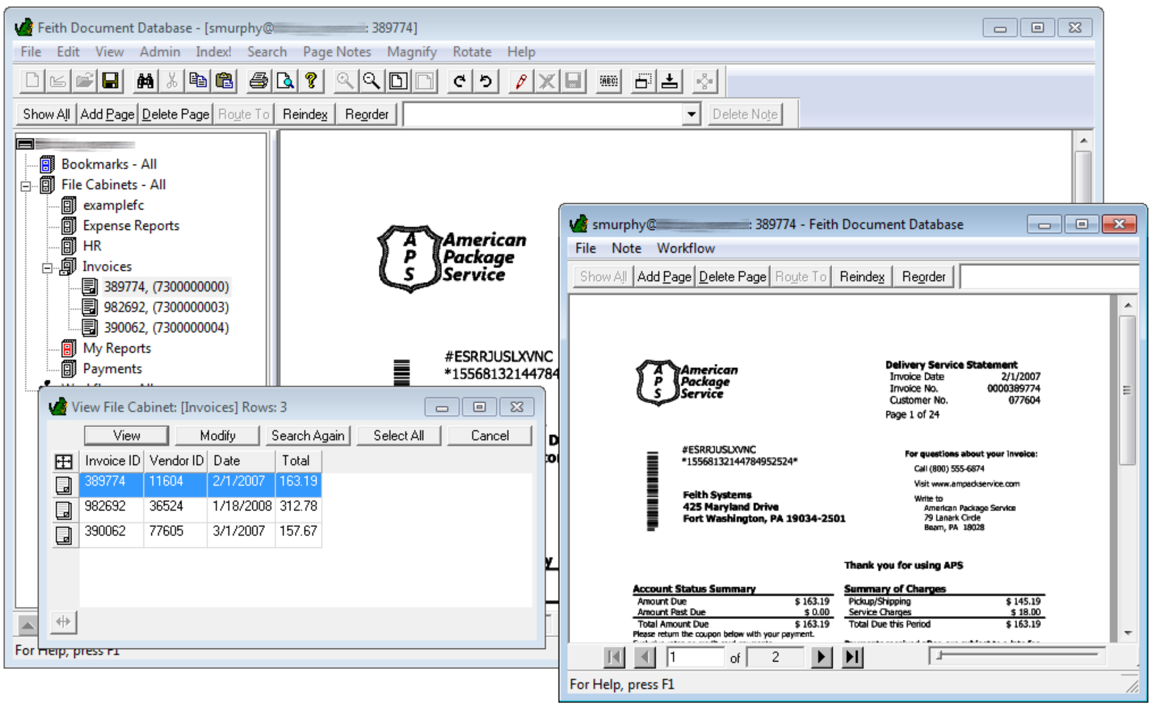
A document can be viewed in a new image window ("pop-up" window). This feature allows multiple documents to be opened at one time.

To open a document in a new image window:

1. View the document following the standard view procedure. See View FDD Documents for more information.
2. Select **New Image Window** from the **File** menu. The document opens in a new image window.

   The new image window can also be opened by CTRL+double-clicking the document icon in the file cabinet grid.
3. Repeat the process to open other documents in new image windows, if desired.

The new image window contains a page bar and a page control bar (see The Toolbars for more information). Page notes are listed in the page control bar. A **Print** option is available under the **File** menu.



Document Preview

A preview option is available for batches and documents on the folder bar, in the file cabinet grid, and in the Work to Do window. If the option is enabled, the first page of a document (or batch) displays in a preview window on mouse-over of the document icon. This feature will display all page types except Forms iQ and XML pages.

To enable Batch Preview for a bin on the folder bar:

- Right-click a bin on the folder bar and select **Batch Preview**.

To enable Document Preview for a file cabinet on the folder bar:

- Right-click a file cabinet on the folder bar and select **Document Preview**.

To enable Document Preview for a file cabinet grid:

- Right-click the file cabinet grid and select **Preferences**>**Document Preview**.

To enable Document Preview for a workflow task in the Work to Do grid:

1. Select a task in the Work to Do grid.
2. Right-click the work item list in the bottom pane of the Work to Do grid and select **Document Preview**.

Minipages

Minipage Basics

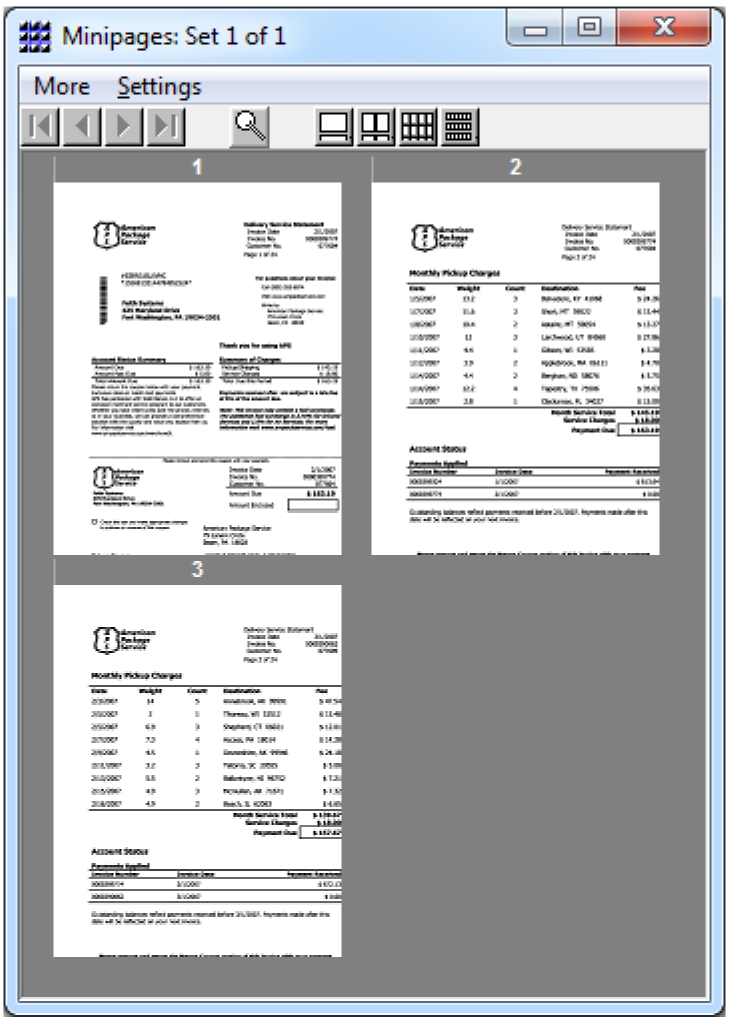
The **Show All** button displays the pages of a document in miniature.

Display Minipages

To display images in minipages:

1. View one or more documents in the FDD window.
2. Click the **Show All** button on the page control bar. The **Minipages** window opens.

   Note: Graphic and highlight notes must be set to **Auto Display** in order to appear in minipages.

   If you are viewing multiple documents in minipages, each document is marked with a tab. The tab labels are values from a file cabinet field. You can choose which file cabinet field to use as the auto-tab label in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

3. Use the scroll bars on the right side and bottom of the minipages window to find the page you want to view.

4. Double-click the page you wish to view. The image will be shown as a full-size page in the FDD view window.
5. When your image is displayed in the FDD view window, the minipage window will minimize automatically if the **Auto Hide Minipages** preference is on.

When displaying a large number of documents in minipages, it is recommended that the per scale percentage be changed to 10% for quicker loading (see Minipage Preferences for instruction on changing percentage).

Display Minipages in Sets

When viewing larger documents, it is possible to limit the number of pages that display in a single minipage window. This is specified in the **Page(s) per Window** setting; see Minipage Preferences for instructions.

If the total number of pages in a document is greater than the **Pages Per Window** setting, multiple minipage sets are created. Each set created contains the maximum number of pages per window. These sets are listed in the **More** menu of the **Minipages** window; each set is numbered and indicates the page range it contains.

To view a mini page set:

1. View one or more documents in the FDD window.
2. Click the **Show All** button on the page control bar. The first minipage set is displayed in the **Minipages** window.
3. Click to display the **More** menu. The additional minipage sets are listed.

   If all pages of the document(s) are contained in the first minipage set, the number "1" is the only listing in the **More** menu.
4. Choose the desired set of minipages. The selected set displays in the **Minipages** window.

Keyboard Shortcuts

You can also use keyboard shortcuts to view different minipage sets.

To view the next set of minipages:

- Simultaneously press the **Shift** key and the **Page Down** key.

To view the previous set of minipages:

- Simultaneously press the **Shift** key and the **Page Up** key.

Minipage Preferences

You can customize the way minipages display by adjusting the minipage preferences.

To change the minipages settings:

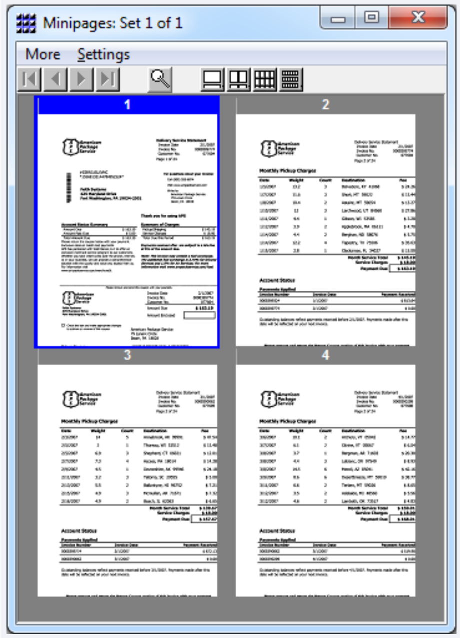
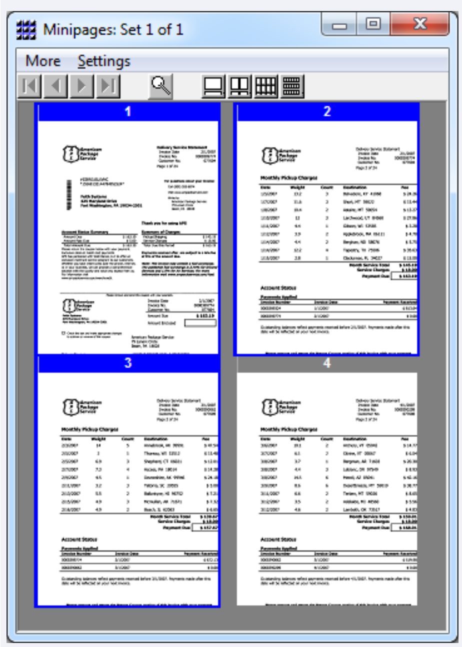
1. From the **Admin** menu, select **Preferences**.
2. Click the **Minipages** tab.
3. In the **Number of pages per row** field, type the number of minipages you want to be displayed per row.
4. In the **First page scale percentage** field, type the desired minipage percentage size (percentage is based on the size of the first page).
5. In the **Page(s) per window** field, type the number of minipages to display per window.
6. Click **OK** to save the changes.

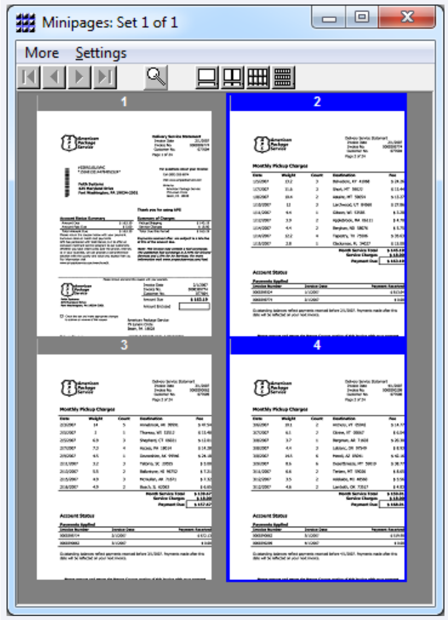
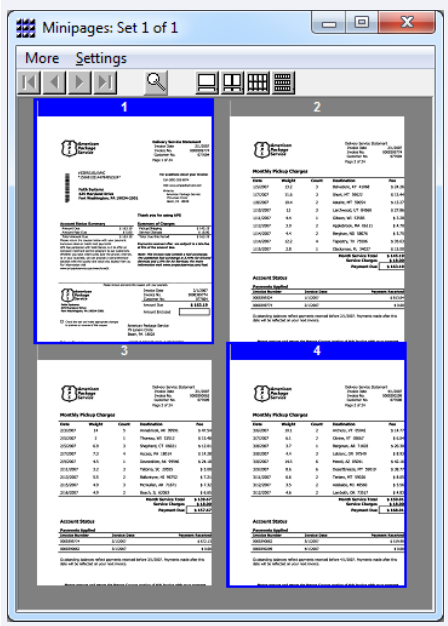
For example, the following settings will display minipages two pages per row, at half size, in sets of 20 pages:

- **2 pages per row**
- **50.00 first page scale percentage**
- **20 pages per window**

Select Minipages

You can select any number of minipages.

SELECTION	KEYSTROKES	INSTRUCTIONS
Single page	click	Click on the page. The page is selected. 
Section of pages	SHIFT + click	Select a page, then press and hold the **SHIFT** key and click another page. Both pages and all pages in between are selected. 

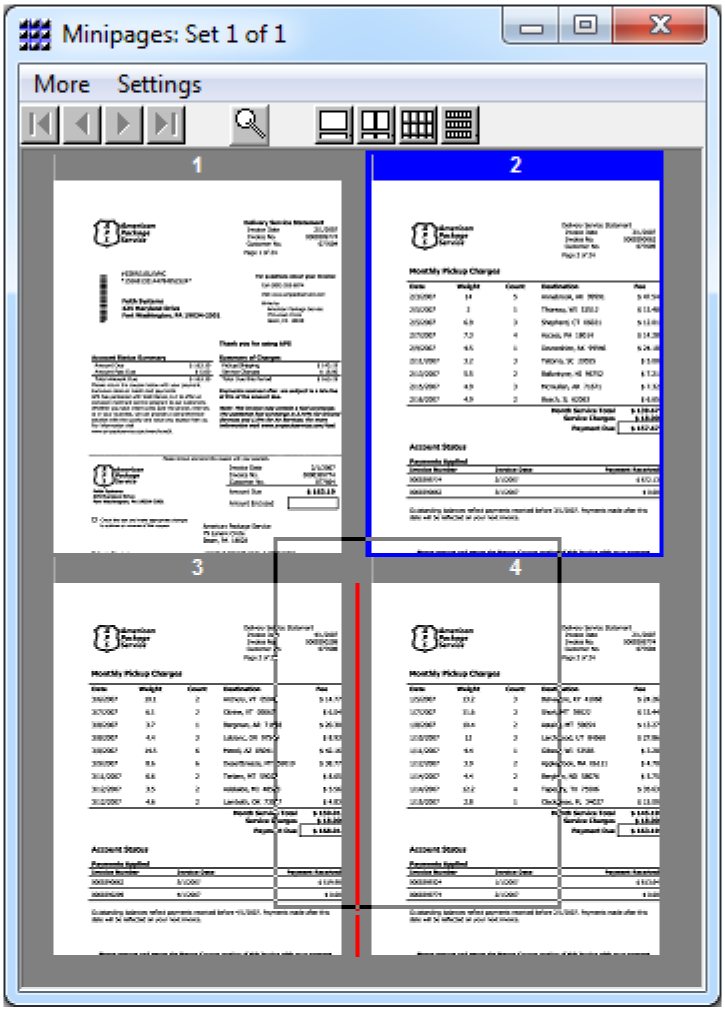
Column of pages	CTRL + ALT + click	Select a page, then press and hold the **CTRL** key and the **ALT** key and click another page. Both pages and the column between them are selected. 
Non-consecutive pages	CTRL + click	Select a page, then press and hold the **CTRL** key and click another page. Both pages are selected. 

Minipage Functions

You can perform several functions when viewing pages as minipages.

To reorder pages:

1. Click a page to select it.
2. Drag the page in front of another page and release the mouse. The page is moved.



This option is disabled when multiple documents are viewed in minipages.

To view image information:

- Right-click on a page and select **Image Information**. The **Image Information** window opens.

This option is disabled if multiple pages are selected.

To view page audits:

- Right-click on a page and select **Page Audit**. The **Page History** window opens.

This option is disabled if multiple pages are selected.

To print:

1. Select a single page or multiple pages.
2. Right-click and select **Print**. The **Additional Print Options** dialog opens; select any options. Click **OK** to print.

To add pages to the document:

1. Right-click on any page and select **Add Page**; select either **Scan** or **Import Files**.
2. Add the page:
    - If you are adding by **Scan**, the scanner's twain interface opens. Scan the pages you want to add and exit the twain interface. The page is appended to the document.
    - If you are adding by **Import Files**, the **File Open** window opens. Browse to find the file you want to add and click **Open**. The page is appended to the document.

This option is disabled when multiple documents are viewed in minipages.

To add a section to a page:

- Right-click on a page and select **Add Section**. A section tab is added to the page.

  See [Document Sections] for more information.

To index a batch:

1. Select a single page or multiple pages.
2. Right-click and select **Index**. The **Index Selected Pages** window opens.
3. Select the file cabinet to index into.
4. If desired, check the **Whole Document** option (to select the entire batch) and/or the **Delete After Index** option (to delete the selected pages after indexing). Check the **Save Current Options** box to save the settings**.**
5. Click **OK**. The selected file cabinet opens.
6. Enter index values and click **Index**. The batch is indexed.

This option is only available when viewing minipages for a batch.

To re-index a document:

1. Select a single page or multiple pages.
2. Right-click and select **Re-Index**. The **Index Selected Pages** window opens.
3. Select the file cabinet to re-index into.
4. If desired, check the **Whole Document** option (to select the entire document) and/or the **Delete After Index** option (to delete the selected pages after re-indexing). Check the **Save Current Options** box to save the settings**.**
5. Click **OK**. The selected file cabinet opens; index values are retained for matching fields.
6. Enter (or modify) index values and click **Index**. The document is re-indexed.

This option is only available when viewing minipages for a single indexed document.

(Note this option is not available from workflow; to re-index, you must view a document from its base file cabinet.)

To route pages to a bin:

1. Select a single page or multiple pages.
2. Right-click and select **Route To**. The **Route Selected Pages** window opens.
3. Select a bin or existing batch and enter a batch name.
4. Select desired routing options such as **Whole Document, Delete After Route**, or **Priority.**
5. Click **OK**. The pages are routed.

See Route a Document for more information.

To export pages:

1. Select a single page or multiple pages.
2. Right-click and select **Export Pages**. The selected pages are exported in PDF format.

This feature requires WebFDD. In addition, this option is not supported for GOS pages or pages with redactions.

To send pages:

1. Select a single page or multiple pages.
2. Right-click and select **Send Pages**. A **Verify Attachments** prompt opens, indicating the size of the attachments to be sent.
3. Click **OK** to the **Verify Attachments** prompt to proceed. (To cancel, click **Cancel**.) A new message opens in your default mail client. The selected page is attached to the message in PDF format.
4. Address and send the message.

This feature requires WebFDD. In addition, this option is not supported for GOS pages or pages with redactions.

To delete pages:

1. Select a single page or multiple pages.
2. Right-click and select **Delete Page**. The pages are deleted.

To rotate pages:

1. Select a single page or multiple pages.
2. Right-click and select **90° Right**, **180° Flip** or **90° Left**. The pages are rotated.

Only images can be rotated. This option is disabled if none of the selected pages are images.

Manage Documents

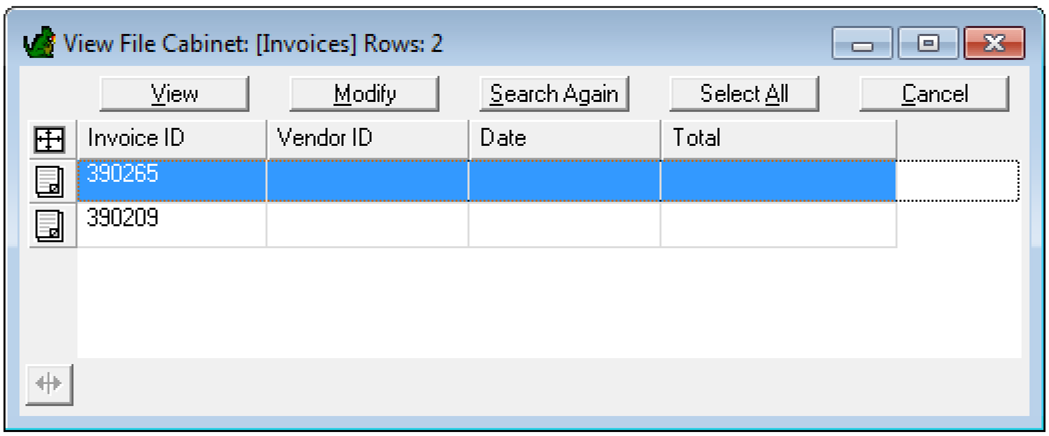
Modify Index Values

Document index values, also referred to as document 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 for a document.

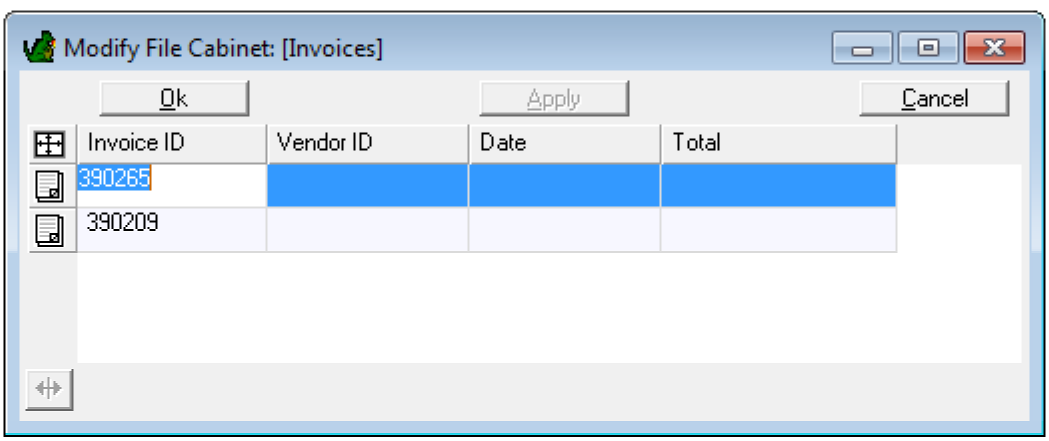
Modify Index Values

To modify the index values of a document:

1. Open a file cabinet and search for the documents you want to modify. (See [Search for Documents] for instructions.)

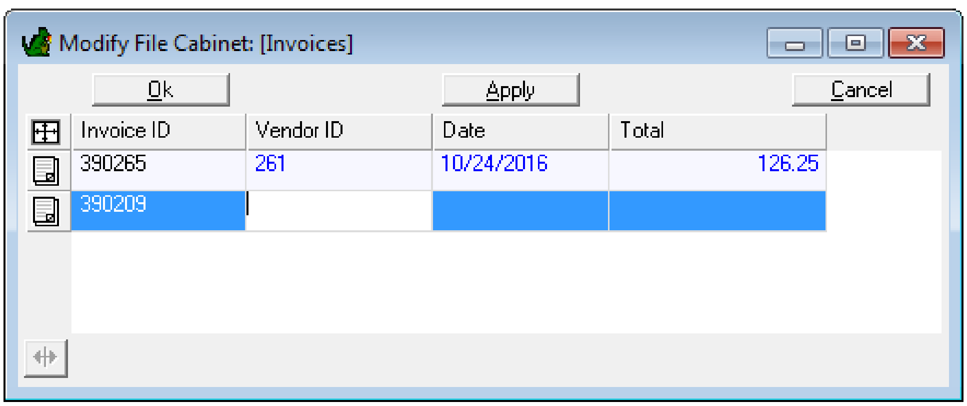


2. Click the **Modify** button in the file cabinet grid. The grid enters edit mode, and the cells turn pale blue to indicate that a change can be made in any editable cell. The currently selected row is highlighted.



3. Enter or change a value in any cell. Click in a cell to start typing. There are many options for modifying index values:
   - Type into the fields.
   - Use the **TAB** key or the right arrow key to move from one field to the next. Use **SHIFT+TAB** or the left arrow key to move back to the left. To move to the next row, use the **ENTER** key; you can also use the up and down arrow keys to move up and down the rows.
   - New field values are entered in a blue font, so you can track your changes.

- When you change row selection, you are warned if any of the values entered in the previously selected row are invalid (e.g., a string value was entered in a date field). The invalid value will display in a red font until modified.
- If the field has a question mark "?" in the header, right-click the header to choose from a list of suggested values in the **Field Look Up** dialog. Alternatively, you may select a lookup value using the **Dropdown** or **Radio** style. See Lookup Tables for more information.
- Select from a list of unique values that already exist for that file cabinet field by right-clicking in the field's column and selecting **Distinct Values**. See Distinct Values for more information.
- In **Highlight Mode** on text and TIF pages, highlight a value on the page itself and select a field to insert the value. See Highlight Mode for more information.
- If entering multiple values into a list field, enter each value separated by a semicolon or click the button to add values. See List Fields for more information.
- Bookmark index values to use them later by right-clicking in the grid and selecting **New Bookmarks>Index Values**. Use an index values bookmark by double-clicking the bookmark in the folder bar. See Bookmark Index Values for more information.
- Note that some index fields may be read-only and you will not be able to enter a value in them.
- Also note that a value of 12:00 AM in a datetime field is stored as 0:00 AM.



6. Click **Apply** if you want to save all changes without exiting modify mode.
7. Click **OK** if you want to save all changes and exit modify mode.
8. Click **Cancel** if you want to discard all unapplied changes and exit modify mode.

Fill Column

When modifying index values, you can quickly fill an entire column with a single value using the file cabinet grid right-click menu option **Fill Column**.

To fill a column with a value:

1. Retrieve the documents you want to modify and click the **Modify** button in the file cabinet grid. The grid enters edit mode.
2. On any row, right-click the column (file cabinet field) you want to edit and select **Fill Column**. A window opens prompting you for the new field value; the window title reflects the selected column name.
3. Enter the new field value. If the file cabinet field has a lookup table, the lookup values appear in a drop down list.
4. Click **OK**. The new field value is entered in the field in each row in the file cabinet grid.

   If the file cabinet field has a lookup table assignment or a field validation that does not allow override, verification is done before the column fill is attempted. If the new field value does not match the lookup table or field validation, an error message will be returned and you will be prompted to edit the value.
5. Click **OK** or **Apply** to save changes.

Keyboard Shortcuts

The following keyboard shortcuts are respected in the FDD file cabinet grid in modify mode.

<table>
<tr><th>SHORTCUT</th><th>ACTION</th></tr>
<tr><td>CTRL+Z</td><td>Undoes typing.</td></tr>
<tr><td>CTRL+C</td><td>Copies the selected text.</td></tr>
<tr><td>CTRL+V</td><td>Pastes text from the clipboard.</td></tr>
<tr><td>F2</td><td>Selects the current cell for editing and places the cursor at the right of the existing value.
When the current cell is active, the following keyboard shortcuts are supported:
<table>
<tr><td>Right arrow key</td><td>Moves focus to the right within the cell.</td></tr>
<tr><td>Left arrow key</td><td>Moves focus to the left within the cell.</td></tr>
<tr><td>ENTER</td><td>Saves the changes to the field value and returns to the regular edit mode.</td></tr>
<tr><td>ESC</td><td>Discards the changes to the field value and returns to the regular edit mode.</td></tr>
</table></td></tr>
<tr><td>TAB</td><td>Moves focus to the cell to the right.</td></tr>
<tr><td>SHIFT+TAB</td><td>Moves focus to the cell to the left.</td></tr>
<tr><td>Right arrow key</td><td>Moves focus to the cell to the right.</td></tr>
<tr><td>Left arrow key</td><td>Moves focus to the cell to the left.</td></tr>
</table>

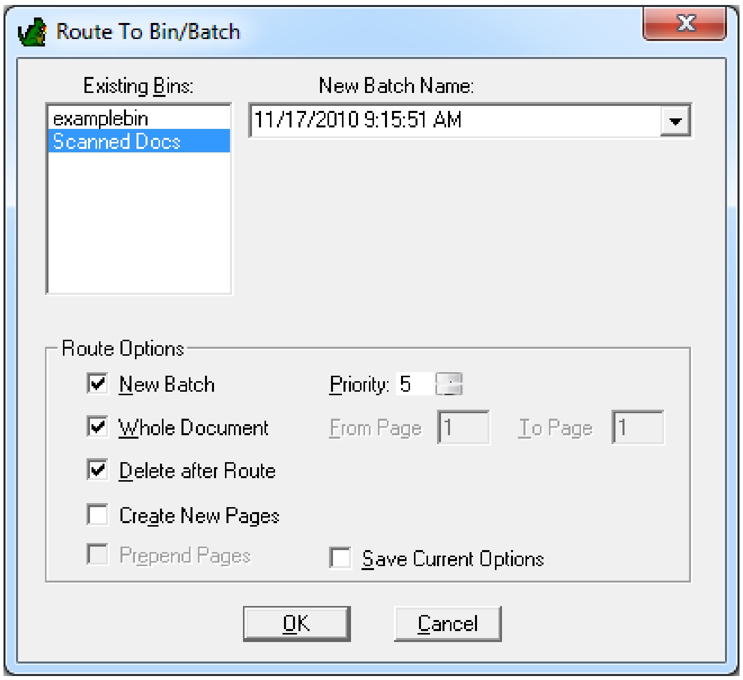
Down arrow key	Moves focus down a row in the current column.
Up arrow key	Moves focus up a row in the current column.
CTRL+down arrow key	Opens a drop-down lookup list. (If the field has a lookup table and if the lookup edit style is set to drop-down.) Within the drop-down lookup list, the following keyboard shortcuts are supported: Down arrow key — Moves focus down in the drop-down lookup list. Up arrow key — Moves focus up in the drop-down lookup list. ENTER — Populates the field with the selected value. ESC — Closes the drop-down lookup list.
ENTER	Moves focus down a row in the current column.
ESC	Discards changes.

Route a 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. View a batch or document.
2. Click the **Route To** button in the page control bar. The **Route to Bin/Batch** dialog opens.



3. Select a bin from the **Existing Bins** list. Use CTRL+click or SHIFT+click to select multiple bins.
4. Select any of the following **Route Options**:

    - **New Batch:** Creates a new batch with the routed pages. Enter a **New Batch Name** if desired (the default is either 1) the original batch name if routing from a bin, or 2) the first column index value if routing from a file cabinet). Leave the option unchecked to add the routed pages to an existing batch. Select a batch from the **Existing Batch** drop-down list and the routed pages will be appended to the batch.
    - **Whole Document:** Routes the entire document. To route a page range, leave **Whole Document** unchecked and enter a range in the **From Page...To Page** fields.
    - **Delete After Route:** Deletes the batch/document from the current bin or file cabinet.
    - **Create New Pages:** Creates new pages with new internal IDs in the routed batch/document.

      Note: If you are routing to the **UTR** bin, the **Create New Pages** and **Delete After Route** options are disabled (unless you are routing from the **UTR_Rejects** bin, in which case the **Delete After Route** option is enabled).

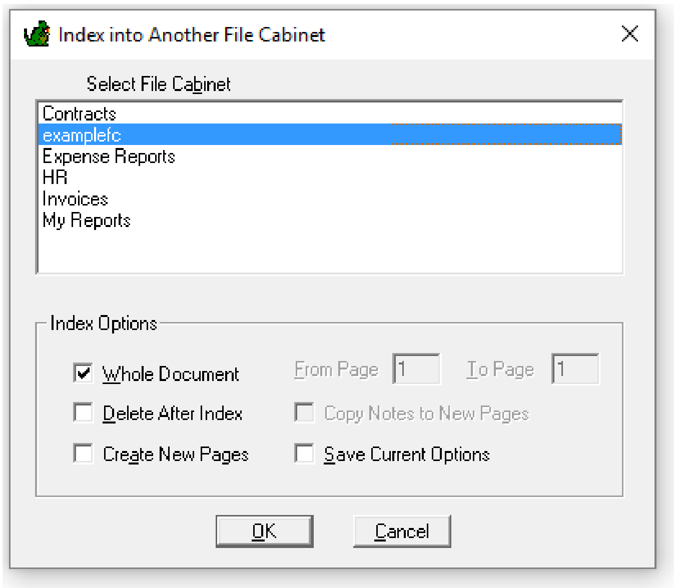
5. Assign a **Priority**. (Batch priority is assigned on a scale of 1 to 9, with 1 being the highest priority.)
6. If desired, check the **Save Current** option to retain all of the selections. The next time you open the **Route to Bin/Batch** dialog, these saved options will be set by default.
7. Click **OK**. The pages are routed.

Reindex a Document

Reindex a document to move or copy the pages to another file cabinet. Reindexing is similar to cutting (or copying) and pasting.

To reindex a document:

1. View the document.
2. Click the **Reindex** button in the page control bar. The **Index Into Another File Cabinet** dialog opens.



3. Select a file cabinet from the **Select File Cabinet** list.
4. Select any of the following **Index Options**:
   - **Whole Document**: If selected, the entire document will be reindexed.
   - **From Page...To Page...**: If a page range is entered, only the pages in this range will be reindexed.
   - **Delete After Index**: If selected, the original document will be deleted after reindex. (**Note:** Only the reindexed pages will be deleted if a page range is reindexed.)
   - **Create New Pages:** Creates new pages with new internal IDs in the reindexed document.
   - **Copy Notes to New Pages:** If you choose to create new pages, optionally check this option on to copy the page notes from the original pages to the new pages.
   - **Save Current Options**: If selected, the current settings will be retained. The next time you reindex, the saved options will be set by default.
5. Click **OK**. The selected file cabinet grid is opened.
6. Enter indexing values for the new document. If the file cabinet into which you are reindexing has any fields in common with the original file cabinet, the document's index values are copied into these fields by default.

   You can also search for an existing document. If an existing document is selected during reindex, the pages will be appended to this document.
7. Click **Index**. The new document is created and you are returned to the original file cabinet grid.

Move Documents

Use the FDD folder bar or file cabinet grid right-click context menu to move documents around quickly between different bins and file cabinets. Cut/Copy and Paste are similar to Reindex and Route.

Move Documents Using File Cabinet Menu

To cut documents:

1. Select one or more documents in a file cabinet. Select multiple documents using **CTRL+click** or **SHIFT+click**.
2. Right-click a selected document and select **Cut**. The document's pages are cut to the clipboard. The original document(s) will not be removed until you do a paste.

To copy documents:

1. Select one or more documents in a file cabinet. Select multiple documents using **CTRL+click** or **SHIFT+click**.
2. Right-click a selected document and select **Copy>Copy Selected Documents**. The document's pages are copied to the clipboard.

To paste cut/copied documents into an existing document:

- Right-click the desired document and select **Paste to this Document/Folder**. The pages on the clipboard are added to the document.

To paste cut/copied documents as a new document:

1. Go to the desired file cabinet and do a search.
2. Right-click on any document and select **Paste as New Document**. You are prompted to enter index values.
3. Enter index values for the new document and click **Index**. The new document is created with the pages from the clipboard.

Move Batches and Documents Using Folder Bar

To cut a batch or document:

1. Select one or more batches in a bin or documents in a file cabinet. Select multiple batches/documents using **CTRL+click** or **SHIFT+click**.
2. Right-click a selected batch/document and select **Cut**. The batch's/document's pages are cut to the clipboard. The original batch(es)/document(s) will not be removed until you do a paste.

To copy a batch or document:

1. Select one or more batches in a bin or documents in a file cabinet. Select multiple batches/documents using **CTRL+click** or **SHIFT+click**.
2. Right-click a selected batch/document and select **Copy**. The batch's/document's pages are copied to the clipboard.

To paste cut/copied batches or documents into an existing batch/document:

- Right-click the desired batch or document and select **Paste**. The pages on the clipboard are added to the batch/document.

To paste cut/copied batches or documents as a new batch/document:

1. Right-click the desired bin or file cabinet and select **Paste.**

   If you moved a batch from one bin to another, it will keep its batch name. If you moved a document from a file cabinet to a bin, the new batch is named with the current date and time. If you moved multiple batches/documents, they will be retained as multiple batches in the destination bin.
2. If you are pasting on a file cabinet, you are prompted to enter index values. Enter index values for the new document and click **Index**. The new document is created with the pages from the clipboard.

   If you moved multiple batches/documents, they will be combined into one document in the destination file cabinet.

Delete Pages and Documents

Delete Pages

To delete a page from a document:

1. View the document.

   If you are viewing a multi-page document, use the page bar at the lower left-hand corner of the FDD screen to select the page you wish to delete.
2. Press the **Delete Page** button in the page control bar.
3. If prompted, click **OK** to the warning. The page is deleted.

Note that documents are retained as 0-page documents when the last page is deleted.

Delete Documents

Documents can be deleted from either the file cabinet grid or the folder bar.

To delete a single document from the file cabinet grid:

1. Search the file cabinet that contains the document. (See Search for Documents for instructions.)
2. Right-click on the document row and select **Delete Selected Rows**.
3. If prompted, click **OK** to the delete warning. The document is deleted and is removed from the file cabinet.

To delete multiple documents from the file cabinet grid:

1. Search the file cabinet that contains the document. (See Search for Documents for instructions.)
2. Select multiple documents by holding down the **CTRL** key while clicking on the rows. The selected documents are highlighted.
3. Right-click one of the selected documents and select **Delete Selected Rows** from the menu.
4. If prompted, click **OK** to the delete warning. The documents are deleted and are removed from the file cabinet.

To delete documents from the folder bar:

1. Display the folder bar by selecting **Folder Bar** from the **View** menu.
2. Double-click the file cabinet icon on the folder bar. The file cabinet grid opens.
3. Search the file cabinet. (See Search for Documents for instructions.) A listing of the documents meeting the search criteria displays on the folder bar, in addition to displaying in the file cabinet grid.
4. Select the document on the folder bar. Select multiple documents by holding down the **CTRL** button while clicking the document names.
5. Right-click the selection and select **Delete** from the menu.
6. If prompted, click **OK** to the delete warning. The document is deleted.

Leaps

A **leap** retrieves related documents from another file cabinet or a workflow task.

Predefined Leaps

There are five types of **Predefined** leaps:

- **Application leap:** Sends keystrokes to an external application.
- **File Cabinet leap:** Searches a file cabinet for related documents.
- **Highlight leap:** Searches a file cabinet on a word or phrase that has been highlighted and copied to your clipboard.
- **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.

Predefined leaps are configured by an administrator in Feith Control Panel. See **Feith Control Panel User Guide** for more information.

To perform an application leap:

1. Retrieve a document in either a file cabinet or a workflow task.
2. Open the **Predefined Leaps** window using one of the following methods:
    - If you are in a file cabinet, right-click the document in the file cabinet grid and select **Leaps>Predefined Leaps**.
    - If you are in a workflow task, select **Leaps>Predefined Leaps** from the **Details** menu or click the **Predefined Leaps**  button.
3. Select an **Application** leap from the list.
4. Click **OK**. The application leap is executed, sending keystrokes to the external application.

To perform a file cabinet leap:

1. Retrieve a document in either a file cabinet or a workflow task.
2. Open the **Predefined Leaps** window using one of the following methods:
    - If you are in a file cabinet, right-click the document in the file cabinet grid and select **Leaps>Predefined Leaps**.
    - If you are in a workflow task, select **Leaps>Predefined Leaps** from the **Details** menu or click the **Predefined Leaps**  button.
3. Select a **File Cabinet** leap from the list.
4. Click **OK**. The file cabinet leap is executed, opening the leapt-to file cabinet and performing a search for related documents.

   You can view any document from the file cabinet. The document opens in a new image window ("pop-up" window); see View Document in New Image Window for more information. You can also select multiple documents in the leap grid and click **View** to open them all in the pop-up window.
5. Close the file cabinet grid to return to the original file cabinet or workflow task.

To perform a highlight leap:

1. Retrieve a document in either a file cabinet or a workflow task.
2. View the document.
3. Click and drag on the page to draw select the value you want to use in the leap (the **Highlight Mode** button must be turned on). See Highlight Mode for more information.

   The page must be a text page or TIF page to be highlighted. If the page is a TIF, the TIF must be either monochrome or grayscale.
4. Upon releasing the mouse button after highlighting, a list of the available leaps displays.
5. Select a leap from the list.
6. The highlight leap is executed, opening the leapt-to file cabinet and performing a search for related documents based on the highlighted value.

   View any document from the file cabinet. The document opens in a new image window ("pop-up" window); see View Document in New Image Window for more information. You can also select multiple documents in the leap grid and click **View** to open them all in the pop-up window.
7. Close the file cabinet grid to return to the original file cabinet or workflow task.

To perform a SQL Leap:

1. Retrieve a document in either a file cabinet or a workflow task.
2. Open the **Predefined Leaps** window using one of the following methods:
   - If you are in a file cabinet, right-click the document in the file cabinet grid and select **Leaps>Predefined Leaps**.
   - If you are in a workflow task, select **Leaps>Predefined Leaps** from the **Details** menu or click the **Predefined Leaps** button.
3. Select a **SQL Leap** from the list.
4. Click **OK**. The SQL leap is executed, displaying the query's results in the **SQL Leap** grid.

To perform a URL Leap:

1. Retrieve a document in either a file cabinet or a workflow task.
2. Open the **Predefined Leaps** window using one of the following methods:
   - If you are in a file cabinet, right-click the document in the file cabinet grid and select **Leaps>Predefined Leaps**.
   - If you are in a workflow task, select **Leaps>Predefined Leaps** from the **Details** menu or click the **Predefined Leaps** button.
   - If you want to leap based on a value on the page, view the page and highlight the desired value (the **Highlight Mode** button must be turned on).

     The page must be a text page or TIF page to be highlighted. If the page is a TIF, the TIF must be either monochrome or grayscale. See Highlight Mode for more information.
3. Select a **URL Leap** from the list.
4. Click **OK**. The URL leap is executed, opening a browser window and navigating to the configured URL.

There are a couple other ways to execute predefined leaps:

- With the **Highlight Mode**  button on, highlight or lasso a value directly on a text page or TIF page (the TIF must be either monochrome or grayscale). A list of available highlight leaps and URL leaps displays, from which you can select the desired leap. See Highlight Mode for more information.
- Some predefined leaps can also be associated with a specific file cabinet field, enabling you to simply double-click the field in the file cabinet to execute the leap. Associated leaps can be file cabinet leaps, SQL leaps, or URL leaps, and are configured in Feith Control Panel (see **Feith Control Panel User Guide** for more information).

Dynamic Leaps

The fields of a file cabinet may exist in other file cabinets. Dynamic leaps are automatically generated and allow you to search in file cabinets with the same field names.

To open the dynamic leap list from a file cabinet:

1. Retrieve a document in a file cabinet.
2. Right-click in a specific field and select **Leaps>Dynamic Leaps**. The **Dynamic Leaps** dialog opens, showing the dynamic leaps for the selected field name.
3. Select a dynamic leap and click **OK**. A file cabinet grid opens, listing documents related to the original document. View any document from the file cabinet.

To open the dynamic leap list from a workflow task:

1. Retrieve a document in a workflow task.
2. Click inside one of the fields.
3. Select **Details>Leaps>Dynamic Leaps**. The **Dynamic Leaps** dialog opens, showing the dynamic leaps for the selected field name.
4. Select a dynamic leap and click **OK**. The file cabinet grid opens, listing documents related to the original document. View any document from the file cabinet.

Document Leaps

A single document may exist in many locations in FDD, such as a file cabinet, virtual file cabinet, or workflow task. A document leap takes you from one location of the document to another. Document leaps are automatically generated.

To perform a document leap:

1. Retrieve a document in a file cabinet or workflow task.
2. Initiate the leap using one of the following methods:

   If you are in a file cabinet, right-click the document in the file cabinet grid and select **Leaps>Where Is It**.

   If you are in a workflow task, select **Details>Leaps>Where Is It**.
3. The **Where Else Is It** dialog opens. Select the desired location from the leap list.
4. Click **OK**. You are taken to the selected location and the document is retrieved.

Document Sections

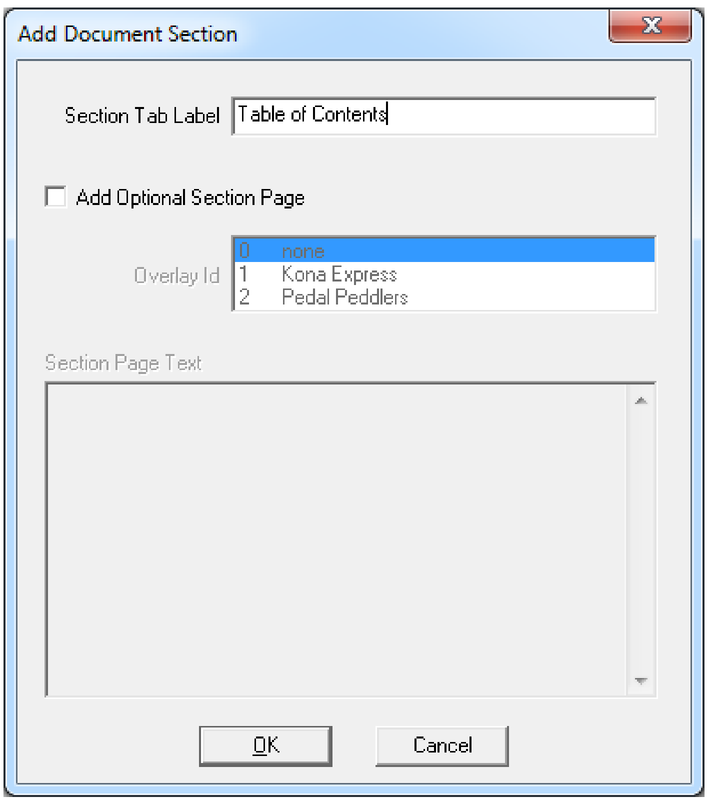
Sections can be added to a document for quicker navigation of the document and for purposes of printing, e-mailing, and exporting a portion of the document.

Create Sections

To create a section:

1. View the document and go to the page you want to be at the beginning of the section.
2. Select **Add Document Section** from the **Edit** menu. The **Add Document Section** dialog opens.
3. Enter the name of the section in the **Section Tab Label** field.
4. You can choose to insert a page at the beginning of the section by checking **Add Optional Section Page**. Options for the section page include:
    - Select an overlay to display on the page.
    - Enter text in the **Section Page Text** field to display on the page.

    If **Add Optional Section Page** is disabled, you do not have permission to add a page to a document.

5. Click **OK**. You will see a tab for the section you created appear in the lower right of the FDD view window.
6. Create additional sections as desired.

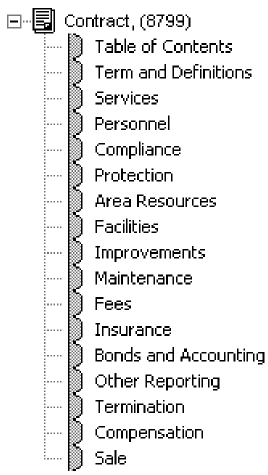
Once you have finished adding sections, you will be able to navigate the document by the section tabs.

If you click **Show All** to view the document in **Minipages**, a section label will appear above the first page of each section.

View Sections

To view an individual section:

1. Do a search for the document that contains the section.
2. View the document. Next to the document's icon in the folder bar, a plus sign will appear. Click the plus sign. The document sections will be listed in the folder bar.



3. Right-click the section icon and select **Open** to view the section. The section will display in the FDD view window.

You can click **Show All** to display the section in **Minipages**.

Delete Sections

To delete a section:

1. View the document and go to the first page of the section you want to delete.
2. Select **Remove Section Tab** from the **Edit** menu. The section will be deleted.

Note that if you selected **Add Optional Page Section** when creating the section, the inserted page is not removed when you delete the section. If you want to delete the page, the process is described in Delete Pages and Documents.

Print, E-mail, and Export Sections

To print, e-mail, or export a document section:

1. View the section.
2. Proceed to print, e-mail, or export the section as you would normally for a document. See the following topics for more information:
   - Print Documents
   - E-mail from FDD, see section "To e-mail a document".
   - Export Documents

Note: A section cannot be exported on its own as a PDF. If you export a section as a PDF, the exported file will contain the entire document.

Folders

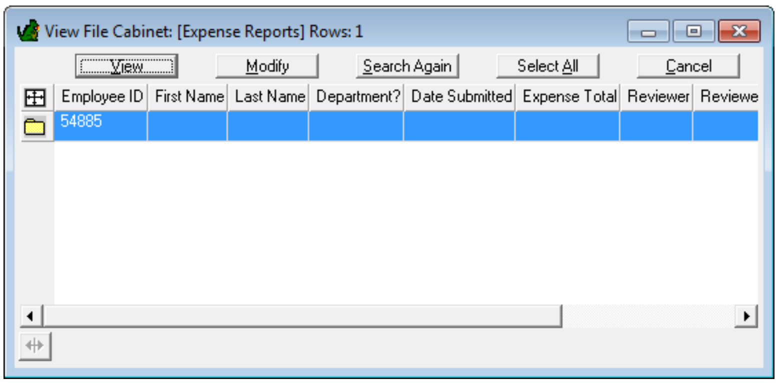
Folders can be used to organize related documents in one location. Folders reside in file cabinets, similar to documents, but can contain documents from across file cabinets.

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

To create a folder:

1. Open a file cabinet.
2. Right-click in the grid and select **Index New>Folder (Empty)**. The title of the grid changes to **New Index for File Cabinet**.

   Note that the **Maintain Folders** task permission is required to create folders. If you do not have this task permission, the **Folder (Empty)** menu option will be disabled.
3. Enter the index values for the folder.
4. Click **OK**. The folder is created.



Add Documents to Folders

To add an existing document to a folder using the file cabinet menu:

1. Retrieve the document(s) in its file cabinet.
2. Select one or more documents in a file cabinet. Select multiple documents using **CTRL+click** or **SHIFT+click**.
3. Right-click a selected document and select **Copy>Copy Selected Documents**. The document's pages are copied to the clipboard.
4. Retrieve the folder in its file cabinet.
5. Right-click the desired folder and select **Paste to this Document/Folder**. The pages on the clipboard are added to the folder.

To add an existing document to a folder using the folder bar:

1. Display the folder bar (select **View>Folder Bar**).
2. Retrieve the document in its file cabinet.
3. On the folder bar, right-click the document and select **Copy**.
4. Retrieve the folder in its file cabinet.
5. On the folder bar, right-click the folder and select **Paste**. The document is added to the folder.

   Note that batches cannot be added to folders.

To add a document to a folder during indexing:

1. Select the **Index** menu. The **Index a Batch** grid opens.
2. Select a bin, file cabinet and batch and click **OK**. The selected file cabinet grid opens and the selected batch is displayed.
3. Click **Clear** to clear any default values.
4. Enter search criteria and click **Search**. The matching documents and folders are listed in the file cabinet.
5. Select a folder and click **Index**. A second window opens, prompting you to enter the document index values.
6. Enter the document index values and click **Index**. The document is indexed into the file cabinet and added to the selected folder.

Manage and Delete Folders

To view the contents of a folder:

1. Retrieve the folder.
2. Double-click the folder icon. The file cabinet grid display changes to show the contents of the folder. The documents are listed by their index values and are grouped by file cabinet.
3. To view a document, double-click the document icon. The document is displayed in the FDD window.
4. Click **Back** to return to the file cabinet grid.

To remove a document from a folder using the file cabinet menu:

1. Retrieve the folder.
2. Double-click the folder icon. The file cabinet grid display changes to show the contents of the folder.
3. Select one or more documents in the folder. Select multiple documents using **CTRL+click** or **SHIFT+click**.
4. Right-click a selected document and select **Remove Selected Rows**. The document(s) is removed from the folder.

To remove a document from a folder using the folder bar:

1. Display the folder bar (select **View>Folder Bar**).
2. Retrieve the folder.
3. On the folder bar, double-click to open the folder.
4. On the folder bar, right-click the document and select **Remove**. The document is removed from the folder.

To delete a folder:

1. Retrieve the folder.
2. Right-click the folder and select **Delete Selected Rows**. The folder 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 FDD. The document still resides in its file cabinet.

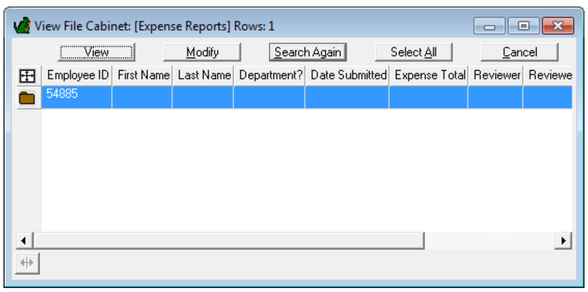
Dynamic Folders

Dynamic Folders can be used to automatically organize related documents in one location. Dynamic folders reside in file cabinets, similar to documents, and contain documents from the same file cabinet or another file cabinet.

Like documents, dynamic folders are assigned index values. One or more of these index values are used to find 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.

To create a dynamic folder:

1. Open a file cabinet.
2. Right click in the grid and select **Index New>Dynamic Folder**.
3. Enter the index values for the folder.
4. Click **OK**. The dynamic folder is created.



Documents in the Dynamic Folder

Dynamic folders automatically find documents based on a file cabinet leap configured as the **Dynamic Folder Leap** set on the file cabinet in Feith Control Panel (see **Feith Control Panel User Guide** for more information). Therefore, it is not necessary to manually add or remove documents from the dynamic folder. The content of the dynamic folder changes on the fly as the results of the **Dynamic Folder Leap** change over time.

Manage and Delete Dynamic Folders

To view the contents of a dynamic folder:

1. Retrieve the dynamic folder.
2. Click **View**. The documents in the dynamic folder display, each document marked with a tab on the right-hand side.

To delete a dynamic folder:

1. Retrieve the dynamic folder.
2. Right-click the dynamic folder and select **Delete Selected Rows**. The dynamic folder is deleted.

Notes:

- When a document is deleted from its file cabinet, it is also removed from any dynamic folder it was in.
- 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

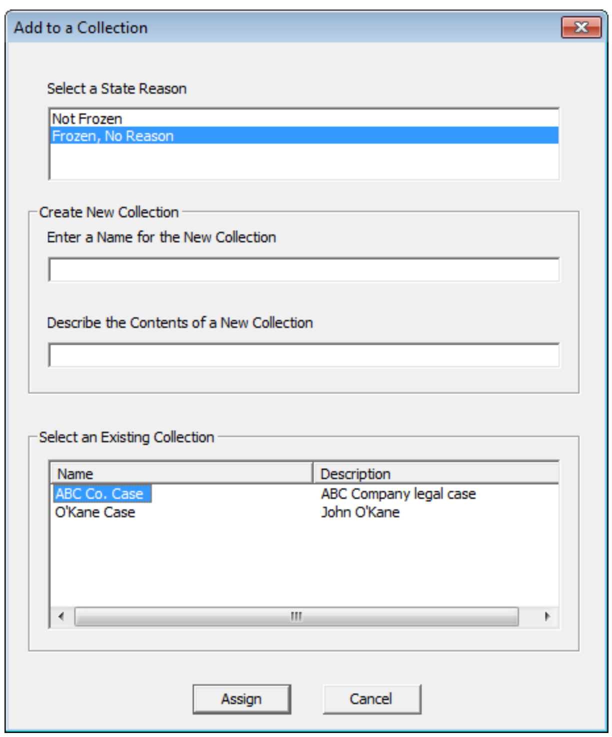
Collect a document into a collection folder in the Collections Center file cabinet. A collection is a set of documents from any file cabinet brought together for your desired purpose, such as eDiscovery or exporting them for someone. Note that a document in a collection still exists in its original location,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

Notes:

- If collection features do not appear, you either do not have sufficient permissions.
- Adding a folder to a collection will result in the folder's documents going into the collection (not the folder itself). A collection cannot contain a folder.

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 its row. You may select multiple documents to collect.
3. Right-click the document and select **Add to a Collection**. The **Add to a Collection** window opens.
4. If your system is configured to use document states - such as "Frozen" for the reason of a court case - optionally **Select a State Reason**. Any existing collections with your selection - either "Not Frozen" or one of the frozen states - are listed below.
5. Choose whether you want to put the document(s) in an existing collection or create a new collection:
   - **Enter a Name for the New Collection:** Create a new collection and add the document(s) to it. Optionally enter a description as well.
   - **Select an Existing Collection:** Add the document(s) to an existing collection. Choose the **Name** of the collection to which you want to add the documents.



6. Click **Assign**. The documents are assigned to the collection.

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 double-click the icon next to a document to view it.

Manage and Delete Collections

To remove a document from a collection:

1. Retrieve the collection in the **Collections Center** file cabinet.
2. Search for the document you want to remove.
4. Right-click the document in the file cabinet grid and select **Remove Selected Rows.** The document is removed from the collection.

To delete a folder:

1. Retrieve the collection.
2. If the collection has a frozen state applied, you will not be able to delete it. Remove the frozen state by right-clicking the collection and selecting **RMA Properties** and removing the state in RMA Workplace.
3. Right-click the collection and select **Delete Selected Rows**. The collection 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 FDD. The document still resides in its file cabinet.

Overlays

An overlay adds to or changes the display of a page. There are two kinds of overlays:

- An image overlay that is displayed "over" a page, typically a text page, to give the impression that you are viewing a completed form. See Create Image Overlay for more information.
- An XSL overlay that changes the display of an XML page per the formatting dictated by the XSL. See Create XSL Overlay for more information.

Overlays are typically applied to a page automatically (e.g. by COLD), but can be applied manually. See Apply Overlay to a Page and Adjust Overlays for more information.

View Overlay

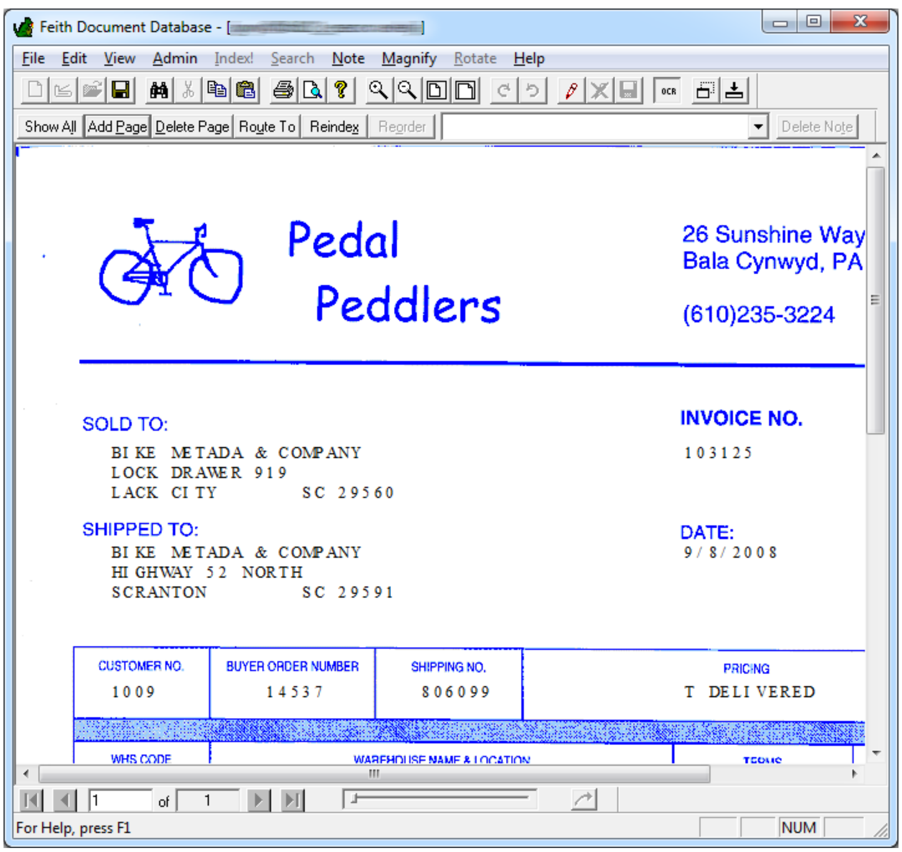
To view an overlay:

- Select **Overlay** from the **View** menu. The overlay is displayed on the page. (The **Overlay** option is checked when the overlay is displayed.)

To hide an overlay:

- Select the **Overlay** option from the **View** menu. The overlay is hidden; only the page is shown.

Example text page with an image overlay:



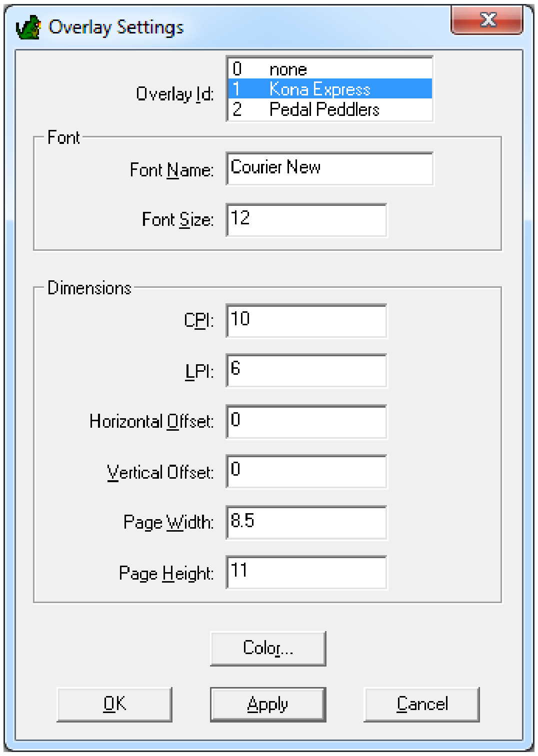
Overlays display by default when the **Always Display Overlay** preference is set. To set this preference:

1. Select **Preferences** from the **Admin** menu.
2. Click on the **Auto-Display** tab.
3. Check the **Always Display Overlay** option and click **OK**.

Adjust Overlay

To adjust overlays:

1. Display a page.
2. Select **Adjust Overlays** from the **Admin** menu. The **Overlays Settings** dialog opens.



3. Change any of the following settings:
   - **Overlay ID**: The ID of the overlay assigned to the page.
   - **Font Name:** The font of the text on the page.
   - **Font Size:** The font size of the text on the page.
   - **CPI:** The number of characters to display per inch.
   - **LPI:** The number of lines to display per inch.
   - **Horizontal Offset:** The amount of horizontal offset in inches.
   - **Vertical Offset:** The amount of vertical offset in inches.
   - **Page Width:** The page width in inches.
   - **Page Height:** The page height in inches.
   - **Color:** Click the **Color** button to open the color palette and choose a **color for the overlay display.**
4. Optionally click **Apply** to view and save the changes without exiting the dialog.
5. Click **Save** to save changes and exit the dialog.

Note that the **Adjust Overlays** menu option is disabled when viewing GOS pages. Also, the **Font** and **Dimensions** settings are disabled in the **Adjust Overlays** dialog when viewing image pages.

Apply Overlay to a Page

Overlays are typically applied to a page automatically (e.g. by COLD), but can be applied manually.

To apply an overlay when acquiring pages:

1. On the scan or import dialog, choose the overlay from the **Overlay ID** list.
2. Acquire the page following the standard procedure (see Introduction to Scanning and Importing for instructions). The overlay is applied.

To apply an overlay to an existing page, use the **Adjust Overlays** option located in the **Admin** menu. See Adjust Overlays for more information.

Create Image Overlay

Image overlays are stored in the **Overlays** file cabinet.

To create an image overlay:

1. Scan or import the overlay into FDD. (See Introduction to Scanning and Importing for instructions.)
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).

These settings can be adjusted while you are viewing a text page associated with this overlay. See Adjust Overlays for instructions.

Create XSL Overlay

XSL overlays can be stored in the **Overlays** file cabinet or remotely.

To create an XSL overlay stored in the **Overlays** file cabinet:

- 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 "XSL".
    - **filename:** The XSL file name.

To create an XSL overlay stored remotely:

1. Create an empty row in the **Overlays** file cabinet by right-clicking in the file cabinet grid and selected **Index New>Document(Empty)**. This will be a placeholder that points to the remote XSL.
2. Finish indexing the row, 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 "XSL".
   - **path:** The path to the remote XSL.
   - **filename:** The XSL file name.

Note the following if your XSL uses images:

- FDD only renders non-native, GOS images in the XSL overlay (e.g. PNG, GIF, etc).
- If you are storing the XSL in the overlays file cabinet, you can store the images it uses in the same document with the XSL. The XSL should be the first page and the latter pages would be the images.
- When pointing to a remote XSL, make sure the images are referred to with absolute paths in the XSL.

Replace Page

You can open a page from FDD and make changes and then a replace page in FDD with a file from your local machine. You can also rescan a page.

Note: Scanning is only supported on FDD scan stations.

Open a Page from FDD

To open a page from FDD:

1. View a page in FDD.
2. Right-click on the page and select **Open Page**. The **Open Page in Application** dialog opens.
3. Click **OK** to save the page to your machine. The page is opened automatically in an application associated with its file type.

   At this point, you can edit the file as desired. If you intend to save the edited page back into FDD, save the file first.

Replace a Page in FDD

To replace a page in FDD:

1. In FDD, right-click on the page you want to replace and select **Save Page to FDD**. The **Save New Page** dialog opens.
2. Select the desired file.
3. Click **OK**. The page is replaced with the file you selected.

Rescan a Page

To rescan a page:

1. View the document in FDD.
2. Select the **Add Page** button on the page control bar. The **Add Page** dialog displays.
3. Select **Rescan Current Page** and click **OK**. Your scanner's twain interface displays.
4. Scan the page you want to add and exit the twain interface.

Convert Page from GOS

Convert a text or image General Object to the native FDD format so that you can do more with the page, such as redacting. This works with pages that are TXT, JPG, and TIF, which may have been stored as GOS for one reason or another.

To convert a page from GOS to native format:

1. View a text or image page of type TXT, JPG, or TIF. The page displays
2. Select **Edit>Convert GOS Page to Native**. A new page in the native FDD format is created in place of the old page. Any page notes are copied over to the new page. The old page is deleted.

Document Versioning

What is Versioning?

Versioning allows a user to create multiple versions of the same document. By creating a different version, a user 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.

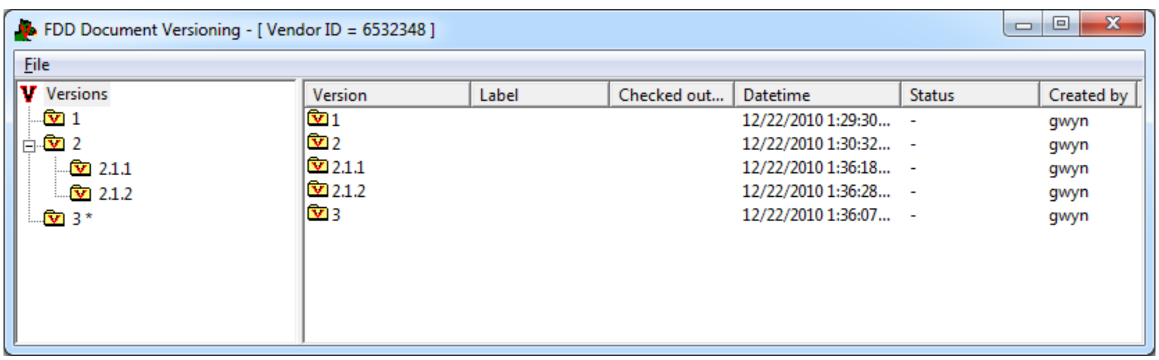
When a versioned document is checked in no one may add, delete, or re-order any pages of that document. However, a versioned document can be deleted altogether.

You may still modify page notes including approval 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 a user must checkout a new version. This will create another document called version 2. FDD then copies all of version 1’s pages into version 2. You can then modify version 2 and then check-in the modified version. During check-in you may enter comments explaining what has changed and 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. FDD will automatically calculate the version numbers and assign them properly.



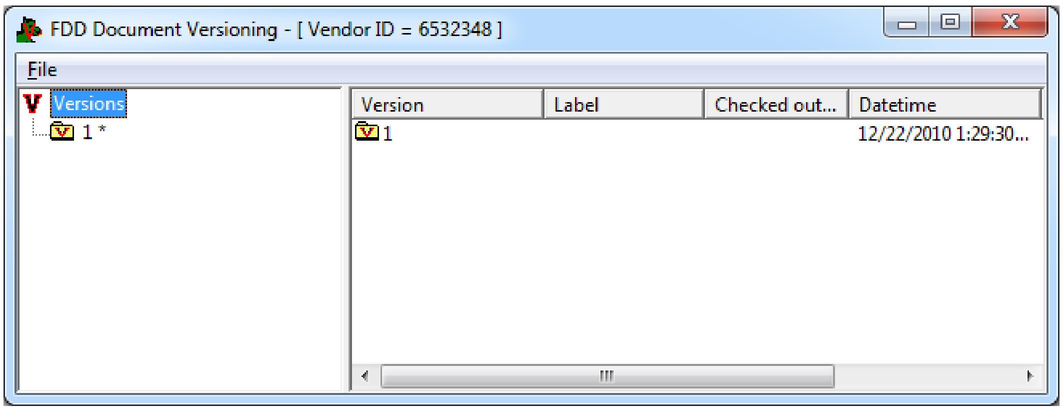
A versioned document can be labeled. When displaying the version history of a document, you have the option to label a version. This is where you can assign small meaningful text to a particular version.

In the document list, a "V" icon will appear to the left of the document to indicate that it is a versioned document.

Versioning a Document

To start a versioned document:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Version Tree**. The **Versioning** dialog opens.
3. Click **OK** to start a version tree. The version tree opens; the document is now checked in as version 1.



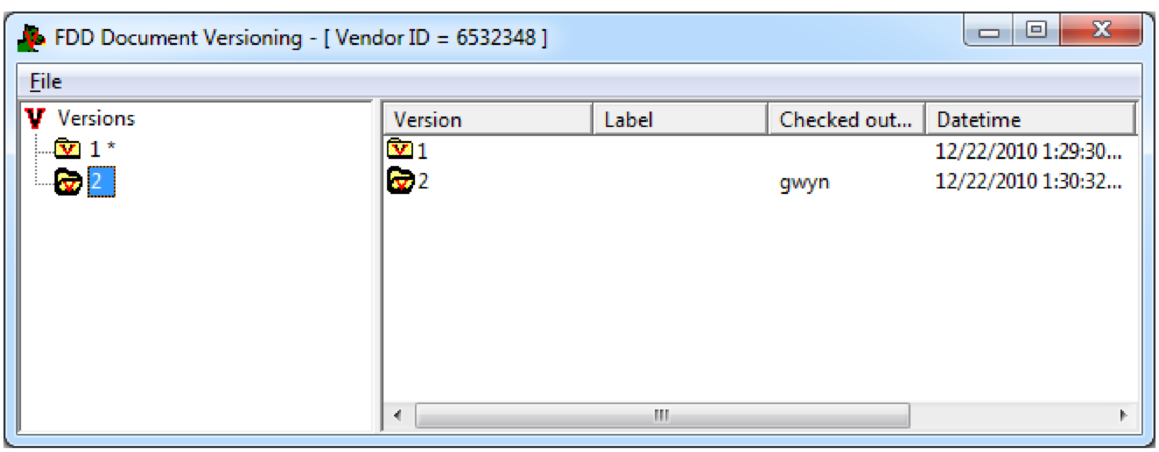
To check out a version:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Check Out**. The last checked in version is checked out.

If you want to check out a specific version, open the version tree (**Version Control**>**Version Tree**), right-click the version and select **Check Out**.

A checked out version is marked by an open folder icon.

Note: The asterisk (*****) denotes the highest checked-in version (the version that will be returned in the file cabinet grid).



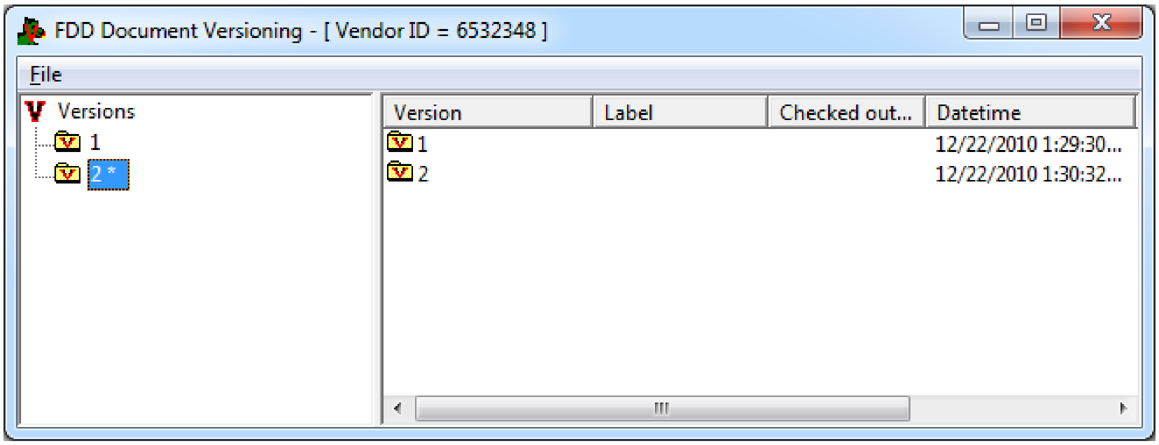
To check in a version:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Check In**. The last checked out version is checked in.

If you want to check in a specific version, open the version tree (**Version Control**>**Version Tree**), right-click the version and select **Check In**.

A checked in version is marked by a closed folder icon.

Note: The asterisk (*****) denotes the highest checked-in version (the version that will be returned in the file cabinet grid).



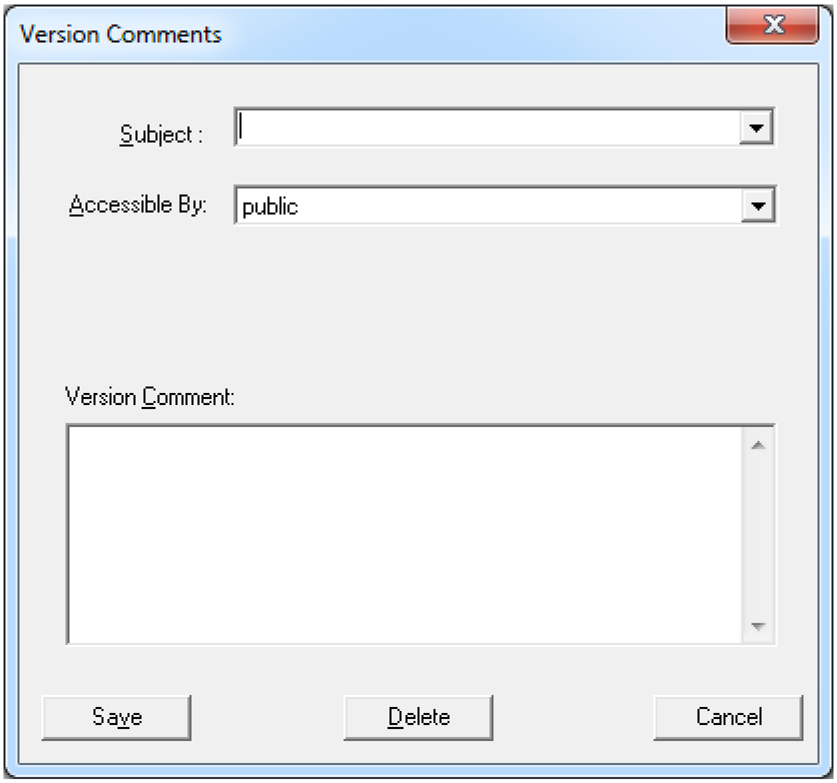
To view a version:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Version Tree**. The version tree opens.
3. Right-click the version and select **View**.

Note: The asterisk (*****) denotes the highest checked-in version (the version that will be returned in the file cabinet grid).

To add a version comment:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Version Tree**. The version tree opens.
3. Right-click the version and select **Comment**. The **Version Comments** dialog opens.



4. Enter a subject, choose an access group and enter the comment.
5. Click **Save**. The comment is added to the version.

To view this comment, right-click on the version and select **Comment**.

To delete a version:

1. Select a document in the file cabinet grid.
2. Right-click the document row and select **Version Control**, then select **Version Tree**. The version tree opens.
3. Right-click the version and select **Delete Version**. The selected version is deleted.

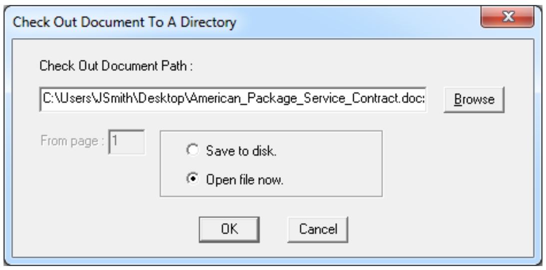
When all versions are deleted, the document is no longer a versioned document.

Check In and Check Out

Use the versioning procedure to check out and check in GOS files to and from your hard drive. Check in/check out allows you to edit a GOS file outside of FDD and check in the modified file as a new version.

To check out a GOS file:

1. Select the versioned document in the file cabinet grid. (See Versioning a Document for instructions on starting a versioned document.)
2. Right-click the document and select **Version Control**, then select **Check Out**. The **Check Out Document to a Directory** dialog opens.

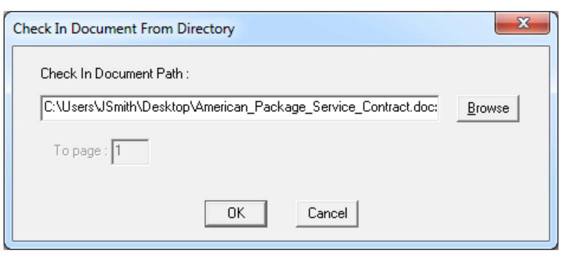


3. Browse to select a path and a filename. Choose either **Save to disk** or **Open new file** (launches file in the external application) and click **OK**.
4. The file is checked out and saved to the specified location; edit it as needed.

Note: This procedure checks out the last checked in version. To check out a specific version, open the version tree (**Version Control**>**Version Tree)**, right-click the version and select **Check Out**.

To check in a GOS file:

1. Select the versioned document in the file cabinet grid.
2. Right-click the document and select **Version Control**, then select **Check In**. The **Check In Document From Directory** dialog opens.



3. Browse to select the file to check in and click **OK**.
4. The file is checked in and displayed in FDD.

Note: This procedure checks in the last checked out version. To check in a specific version, open the version tree (**Version Control**>**Version Tree**), right-click the version and select **Check In**.

To change the default check out directory:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Misc** tab.
3. Enter a new path in the **Check Out Directory** field.
4. Click **OK** to save your changes.

Page and Document Notes

Page Notes

Page Notes Introduction

Page notes are similar to Post-it® notes. There are several types of page notes:

Graphic	Used to draw or write on a page.
Text	Used to add comments to a page.
Highlight	Used to highlight a section of a page.
Redaction	Used to redact a section of a page.
Stamp	Used to quickly create a page note. There are two types of stamps: image and text.
Personal Stamp	Used to place an image of your full name or initials on a page.

Features common to most page note types:

- Page notes do not alter the original page in any way.
- Page notes are identified by the user who created it, the date it was created and its note type.
- Certain task permissions are required to create, modify, and delete notes. See **Feith Control Panel User Guide** for more information.

In addition:

- Graphic, text, approval and highlight notes can be configured to display automatically.
- Image stamps and personal stamps always display automatically.
- Redaction notes display automatically, hiding redacted content, if the **Apply All Redactions** preference is selected.

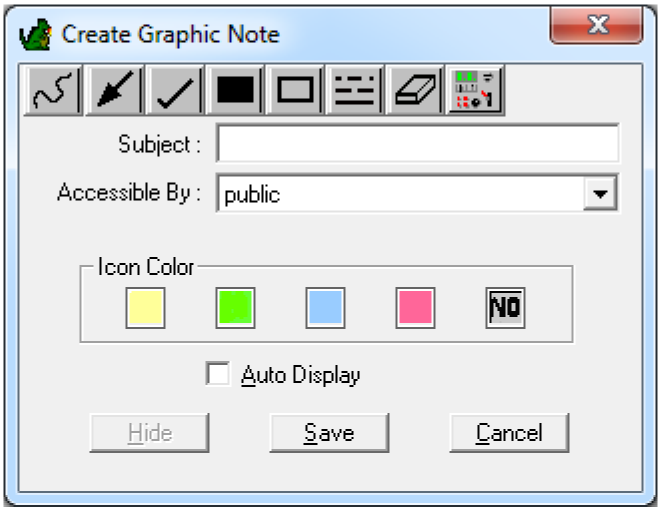
Note: Visual notes, such as graphic notes, are not supported when using the **Full PDF Reader** to view pages. See Change Preferences for more information.

Graphic Notes

Graphic notes can be used to draw or write on a page.

To create a graphic note:

1. View a page.
2. Select **Graphic** from the **Note** menu. The **Create Graphic Note** dialog opens.



3. Enter the **Subject** of the note.
4. Use the **Accessible By** drop-down list to select the group that can view the note.
5. Optionally select an **Icon Color** to create a sticky note. Choices are yellow, green, blue or red.
6. Optionally check **Auto Display** to force the note to display automatically. Up to 10 graphic notes can display at the same time.
8. Draw the note by holding down the mouse button and dragging the pointer over the image. Release the mouse button when you are finished.
9. Click **Save** to attach the note to the page.

To create a graphic note using toolbar buttons:

1. View a page and click the Create Graphic Note tool icon .
2. Draw the note on the page. Click the Save Graphic Note tool icon  to save the note.

To cancel the note, click the **Cancel Graphic Note** tool icon **.**

To use hotkeys:

SHIFT + **CTRL** + **G** changes the cursor to the graphic note tool.

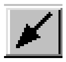
SHIFT + **CTRL** + **S** saves a graphic note.

SHIFT + **CTRL** + **C** cancels a graphic note.

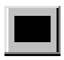
Changing graphic note options:

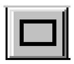
1. Open the **Create a Graphic Note** dialog (**Notes**>**Graphic**).
2. Click one of the eight option buttons located at the top of the window:

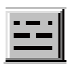
 Changes the cursor to a curved line tool.

 Changes the cursor to an arrow tool.

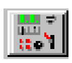
 Changes the cursor to a checkmark tool.

 Changes the cursor to a square tool.

 Changes the cursor to an outline tool.

 Changes the cursor to a line tool.

 Changes the cursor to an eraser tool.

 Changes the note properties, including color and pen size. Note: Color is a per workstation setting and is applied to all graphic notes.

3. Use the selected graphic note tool to draw a note on the page following the standard "create a graphic note" procedure.
4. To change the cursor to a text tool, select the curved line tool, double-click an area on the page, and type.

If the **Create a Graphic Note** dialog does not open when you use the graphic note toolbar buttons or hotkeys, your preferences may be set to hide the dialog. See the section below for instructions on changing the **Hide Graphic Note Dialog** preference.

To hide a graphic note:

1. Open the graphic note dialog of an existing note. See View Page Notes for more information.
2. Click the **Hide** button. The graphic note will be hidden and the **Hide** button will change to the **Restore** button, which you can use to redisplay the graphic note.

   Note: This feature dos not affect the printing of a graphic note. If the graphic note is open or set to **Auto Display**, it will print.

To hide the graphic note dialog:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Misc** tab.
3. Check the **Hide Graphic Note Dialog** option.
4. Click **OK** to save your changes.

If the **Hide Graphic Note Dialog** option is checked, the dialog does not open when you use the graphic note toolbar buttons or hotkeys. However, the graphic note dialog will always display when you select **Graphic** from the **Note** menu or select **Sticky Notes>Graphic** from the FDD view window context menu.

To restore the graphic note dialog:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Misc** tab.
3. Un-check the **Hide Graphic Note Dialog** option.
4. Click **OK** to save your changes.

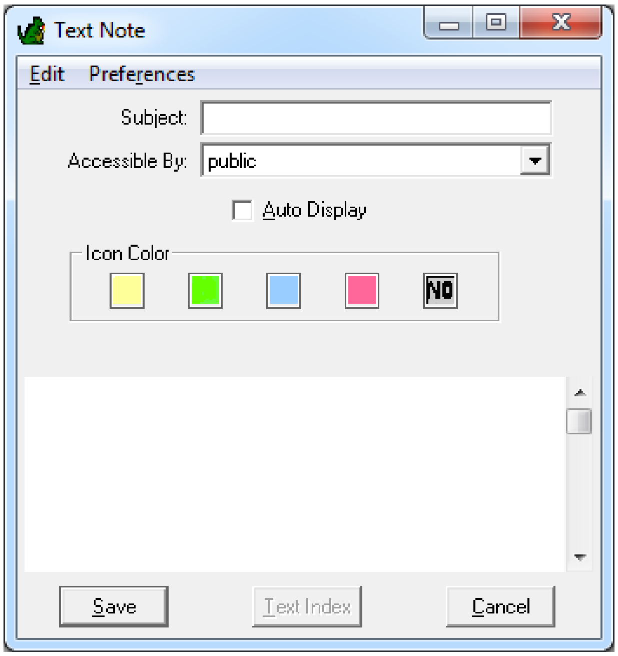
If the **Hide Graphic Note Dialog** option is not checked, the dialog opens when you use the graphic note toolbar buttons or hotkeys.

Text Notes

Text notes can be used to add comments to a page.

To create a text note:

1. View a page.
2. Select **Text** from the **Note** menu. The **New Note** dialog opens.



3. Enter the **Subject** of the note.
4. Use the **Accessible By** drop-down list to select the group that can view the note.
5. Optionally select an **Icon Color** to create a sticky note. Choices are yellow, green, blue or red.
6. Optionally check **Auto Display** to force the note to display automatically.
7. Type the text of your note in the large text field. Use the **Edit** menu to paste text from the clipboard into the text field.
9. Click **Save** to attach the note to the page.

Choosing the "small note" display:

1. Open the **New Note** dialog (**Notes**>**Text**).
2. Select **Small Note** from the **Preferences** menu. The options on the top half of the **New Note** dialog (**Subject**, **Accessible By**, etc.) are hidden.

To de-select the small note option, choose **Small Note** from the **Preferences** menu again.

Choosing word wrap:

1. Open the **New Note** dialog (**Notes**>**Text**).
2. Select **Word Wrap** from the **Preferences** menu.

To de-select the word wrap option, choose **Word Wrap** from the **Preferences** menu again.

Approval Notes

Note: Approval notes are being phased out. Depending on the functionality you require, we recommend you consider alternatives such as the Blog Bar or Feith Workflow iQ (see Blog Bar and **Feith Workflow Manager User Guide** for more information). For further information on alternatives to approval notes, please contact your Feith Systems and Software, Inc., sales representative.

To create an approval note:

1. View a page.
2. Select **Approval** from the **Note** menu. The **New Approval Note** dialog opens.
3. Enter the **Subject** of the note.
4. Use the **Accessible By** drop-down list to select the group that can view the note.
5. Check the **Lock** option if you do not want other users to edit the note.
6. Enter background information (a description of your request) into the top text field.

   The bottom text field displays the history of all actions and comments entered on the approval note.
7. Click **Save** to attach the note to the page.

To search for approval notes:

1. Select **Approvals to Do** from the **Search** menu. The **Approvals to Do** dialog opens.
2. Click the **All Approvals** radio button.
3. Click on **Search**. All file cabinets and bins containing documents with approval notes are listed.
4. Click on a file cabinet or bin. A list of documents appears.
5. Highlight the document and click **View**. The approval note displays.

To approve an approval note:

1. View the approval note.
2. In the status field, click the **Approve** radio button.
3. If desired, enter explanatory text in the top field of the note.
4. Click **Save**.

To disapprove an approval note:

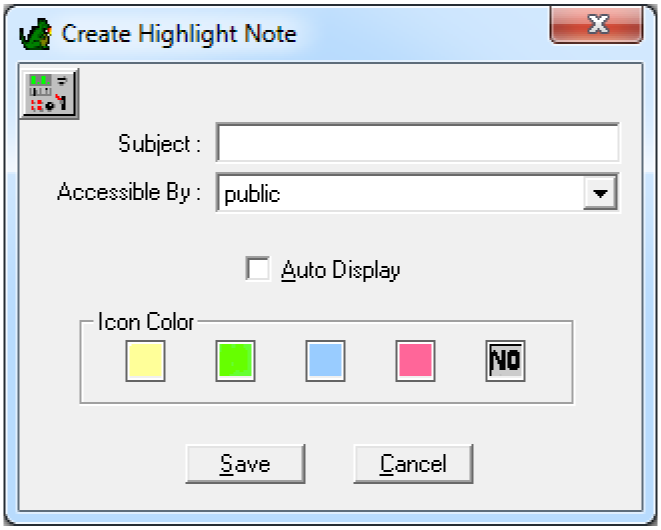
1. View the approval note.
2. In the status field, click the **Disapprove** radio button.
3. If desired, enter explanatory text in the top field of the note.
4. Click **Save**.

Highlight Notes

Highlight notes can be used to highlight a section of a page.

To create a highlight note:

1. View a page.
2. Select **Highlight** from the **Note** menu. The **Create Highlight Note** dialog opens.



3. Enter the **Subject** of the note.
4. Use the **Accessible By** drop-down list to select the group that can view the note.
5. Optionally select an **Icon Color** to create a sticky note. Choices are yellow, green, blue or red.
6. Optionally check **Auto Display** to force the note to display automatically.
7. Drag the cursor to select a rectangular area on the page and release the cursor. The area is filled with the highlight.
8. Click **Save** to attach the note to the page.

Note: Highlight notes cannot be applied to GOS pages.

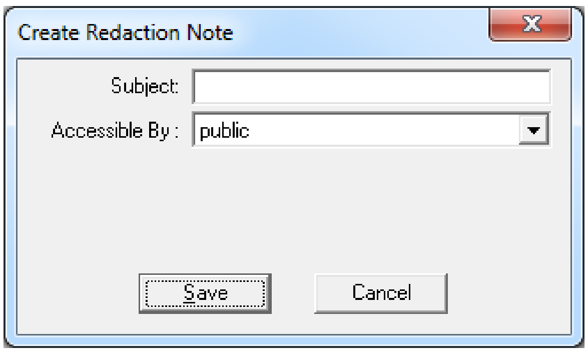
Redaction Notes

Redaction notes can be used to obscure ("black out" or "white out") a section of a page in order to hide confidential information. Both rectangular and polygonal redactions are supported.

Redaction notes can be applied to a document before printing, faxing or exporting. The document will be printed or exported with the redaction note.

To create a redaction note:

1. View a page.
2. Select **Redact** from the **Note** menu, then select either **Rectangle** or **Polygons**. The **Create Redaction Note** dialog opens.



3. Enter the **Subject** of the note.
4. Use the **Accessible By** drop-down list to select the group that can view the note (redactions display as a translucent highlight to the access group).
5. Redact an area on the page:

   To redact a rectangular area, click and drag the cursor to select a rectangular area on the page and release the cursor.

   To redact a polygonal area, click to set a start point, then click to set the end point of the first line. Continue clicking to set end points for subsequent lines. The polygon will close itself (to create a triangle) after you have added three points to the image; add additional end points to alter the shape of the polygon.
6. Repeat to redact additional areas if desired.
7. Click **Save** to save the redactions and attach the note to the page.

See Change Preferences for information on the **Apply all Redactions** display option.

To create redaction notes from the redact zones control bar:

1. Display the redact zones control bar (select **Redact Zones Control** from the **View** menu).
2. View a page.
3. Select either the **Rectangle Redaction** button  or the **Polygon Redaction** button  from the control bar.
4. Redact an area on the page:

   To redact a rectangular area, click and drag the cursor to select a rectangular area on the page and release the cursor.

   To redact a polygonal area, click to set a start point, then click to set the end point of the first line. Continue clicking to set end points for subsequent lines. The polygon will close itself (to create a triangle) after you have added three points to the image; add additional end points to alter the shape of the polygon.

5. Repeat to redact additional areas if desired.
6. Click the **Save** button  on the control bar. The **Create Redaction Note** dialog opens.
7. Enter the **Subject** of the note.
8. Use the **Accessible By** drop-down list to select the group that can view the note (redactions display as a translucent highlight to the access group).
9. Click **Save** to save the redactions and attach the note to the page.

See Change Preferences for information on the **Apply all Redactions** display option.

To edit (add, move, or resize) a redaction region:

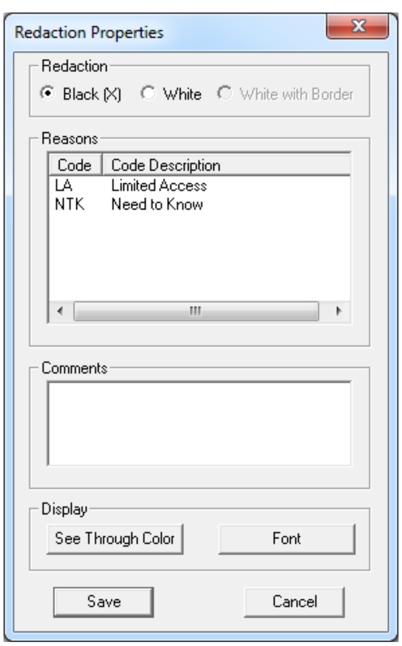
1. View the note.
2. Click the **Edit** button on the **Redaction Note** dialog. The redacted region(s) is selected.
3. Move or resize the existing redaction region or create a new redaction region.
4. When you are finished, press the **Save** button. A prompt will display, asking if you want to overwrite the existing note. Press the **Yes** button to save the changes to the original redaction. Press the **No** button to create a new redaction note; the original redaction note will not be altered.

To delete a redaction region:

1. View the note.
2. Click the **Edit** button on the **Redaction Note** dialog.
3. Right-click the redacted area and select **Redactions**>**Delete**. The redacted area is deleted.
4. When you are finished, press the **Save** button.

To modify the properties of a redaction note:

1. View the note.
2. Click the **Edit** button on the **Redaction Note** dialog.
3. Right-click on the redacted area and select **Redactions**>**Properties**. The **Redaction Properties** dialog opens.



4. Choose **Black**, **White**, or **White with Border** for the redacted area. Note that on text pages, the redacted area is filled with X's if you choose **Black**. Also, the **White with Border** option cannot be applied to text pages.
5. Specify the reason for redaction in the **Reason** field. The reason comment displays in the middle of the redacted area.
6. Click **See Through Color** in the **Display** field and select the highlight color (this displays over the redacted region when viewed by the access group).
7. Click **Font** in the **Display** field and select a font, style, and size for the reason comment.
8. When you are finished, press the **Save** button.

To export a document with redactions:

1. Log in as a user without permission to view the redaction note. If the exporting user is in the access group of the redaction note (i.e., the user can see the redacted content), then the redaction will not appear on the exported PDF.
2. View the document with redactions.
3. From the **File** menu, select **Export**, then select **Export Document.** The **Export Document To A Directory** dialog opens.
4. Click **Browse** to select a destination directory for the exported file(s).
5. Enter the page range to export. The default page range includes all pages in the document.
6. Under **Export File Type**, choose **PDF file per document** or **PDF as a single file**. See Export Documents for more information about these options.
7. Click **OK**. The document is exported; you will receive a success message when the export is complete.

Note: Redactions cannot be applied to GOS pages.

Image and Text Stamps

Image and text stamps are stored in the database and can be used to create page notes on either image or text pages.

Configure Stamps

To configure an image stamp:

You can configure an image stamp by either importing an image file or "grabbing" an area of an FDD image.

To import an image file as an image stamp:

1. Select **Stamp** from the **Note** menu. The **Create Stamp Note** dialog opens.
2. Select **New>Import**.
3. Select the image file to import. The file must be a TIF or JPG. Color images or well-defined monochrome images are recommended.
4. Click **Open**. The **Save Stamp As** dialog opens.
5. Enter a name for the stamp.
6. In the **Accessible By** field, select the group that can use the stamp. By default, the **public** group is selected.
7. Click **OK**. The image stamp is saved to the database.

To "grab" an area of an FDD image and save it as an image stamp:

1. View an image in FDD. (This will not work on text or GOS pages.)
2. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
3. Select **New>Grab**. FDD prompts you to select an area to grab.
4. Click on the page. A selection box displays on the page.
5. Move and resize the selection box as desired, so that the area you want to grab is contained in the selection box.
6. In the **Create Stamp Note** dialog, select **New>Grab**. The **Save Stamp As** dialog opens.
7. Enter a name for the stamp.
8. In the **Accessible By** field, select the group that can use the stamp. By default, the **public** group is selected.
9. Click **OK**. The image stamp is saved to the database.

To configure a text stamp:

1. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
2. Select **New>Text Note**. The **Text Stamp Template** dialog opens.
3. Enter the body of the text stamp.

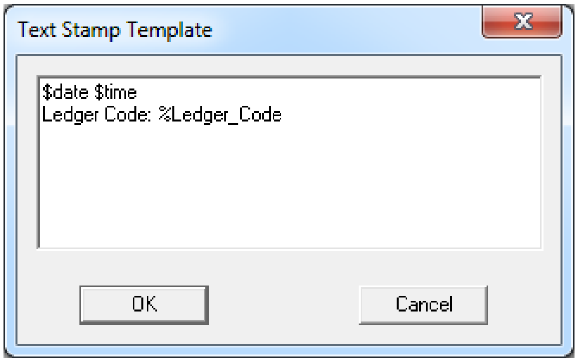
   Two wildcards are supported in text stamps: **$date** and **$time**. In addition, a variable can be specified using the format **%variable**.

   $date inserts the current date.

   $time inserts the current time.

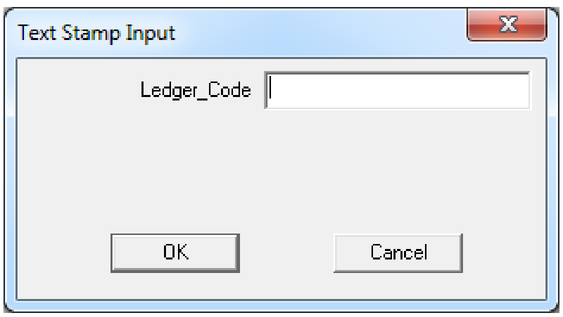
   %variable prompts the user to enter a value for the variable.

   Note that the text stamp has a maximum size of 1,000 characters and a maximum of 15 variables.

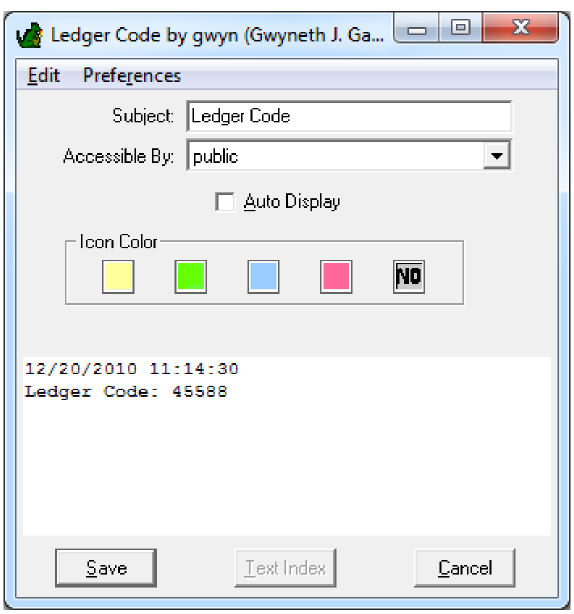


4. Click **OK**. The **Save Stamp As** dialog opens.
5. Enter a name for the stamp.
6. In the **Accessible By** field, select the group that can use the stamp. By default, the **public** group is selected.
7. Click **OK**. The text stamp is saved to the database.

If a user stamps a page using a text stamp template with a variable, they will be prompted to enter the value of the variable upon stamping the page:



For example, if a user prompted with the dialog above entered "45588" as the Ledger_Code, the resulting text stamp note would look like this:



To edit a stamp:

Text stamps can be modified; image stamps cannot be modified.

To edit a text stamp:

1. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
2. Select the text stamp you wish to edit.
3. Right-click the text stamp and select **Edit Selected Stamp**. The **Text Stamp Template** dialog opens.
4. Edit the stamp as desired.
5. Click **OK** to save the edited text stamp.

To delete a stamp:

1. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
2. Select the stamp you wish to delete.
3. Right-click the stamp and select **Delete Selected Stamp**.
4. Answer **OK** to the warning prompt. The stamp is deleted.

Stamp a Page

To image stamp a page:

1. View a page in FDD.
2. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
3. Enter a **Subject** for the new note.
4. In the **Accessible By** field, select the group that can view the note. By default, the **public** group is selected.

   Note: The **Auto Display** setting does not apply to image stamps; image stamps always display when the page is viewed.
5. Select an image stamp from the list.
6. Click on the page. The image stamp displays on the page.
7. Move and resize the image stamp as desired.
8. In the **Create Stamp Note** dialog, click **Save**. The image stamp note is saved.

   Note that image stamps display and print automatically.

To text stamp a page:

1. View a page in FDD.
2. Select **Note>Stamp**. The **Create Stamp Note** dialog opens.
3. Enter a **Subject** for the new note.
4. In the **Accessible By** field, select the group that can view the note. By default, the **public** group is selected.
5. Optionally turn on **Auto Display** to force the note to display automatically.
6. Select a text stamp from the list.
7. In the **Create Stamp Note** dialog, click **Save**.
8. If prompted with the **Text Stamp Input** dialog, enter the requested values then click **OK** to save the note.

Use the Graphic Stamp Bar

To enable the Graphic Stamp Bar:

- Select **Graphic Stamp Bar** from the **View** menu. Enabling this option causes a toolbar to appear. This toolbar is designed to make applying and saving stamps faster and easier.

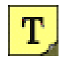
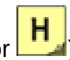
To apply and save a stamp:

1. Select the **stamp** icon, which appears on the far left side of the **Graphic Stamp Bar**.
2. Select a stamp from the **drop-down menu**.
3. Place your cursor over the document and **click**. This applies the stamp to the document.
4. Resize the stamp if necessary by clicking and dragging the edges.
5. To move the stamp, click and hold in the center of the stamp and drag to the desired location.
6. To cancel a stamp, click the **cancel** icon on the far right side of the **Graphic Stamp Bar**.
7. To save a stamp, click the **save** icon to the left of the drop-down menu.
8. See Toolbars for images of the icons described.

Sticky Page Notes

Sticky Page notes are graphic, text or highlight notes that can be opened by clicking on a sticky note style icon. The sticky note icon can be positioned anywhere on the page.

To create a sticky note:

1. Display a document in FDD.
2. Create a graphic, text or highlight note. See the following topics for more information: Graphic Notes, Text Notes, and Highlight Notes.
3. On the **Create Note** dialog, choose an icon color (yellow, green, blue or red).
4. Click the **Save** button. A sticky note icon (, , or ) appears on the document.

To display a sticky note:

- Double click the note icon.

To move a sticky note:

- Place cursor over the note icon, hold the left mouse button down and drag the icon to a new location.

To delete a sticky note:

1. Right-click the note icon and select **Notes**>**Delete**.
2. Answer **OK** to "Delete...?" prompt. The note is deleted.

To hide a sticky note icon:

1. Right-click on the page to bring up the FDD view window context menu.
2. Select **Sticky Notes**.
3. Select **Hide**. All sticky note icons on the page will be hidden.

Personal Stamps

Personal stamps can be used to stamp your full name or your initials on a page.

Note that personal stamps are only images of your name or initials. If you want to sign a document, see Sign a Document for instructions.

Configure Personal Stamps

Personal stamps are configured under the **Admin** menu **Personal Stamps** option. There are two types of personal stamps: full name and initials. The **full name** personal stamp is meant to represent your full name; the **initials** personal stamp is meant to represent your initials.

To import an image file to use as a personal stamp:

1. Select **Personal Stamp** from the **Admin** menu, then select either **Full Name** or **Initials**, then select **Import**. The **Enter your Password** dialog opens.
2. Enter your password. The **Import Full Name/Initials** dialog opens.
3. Click the **Import** button. The **File Open** dialog opens.
4. Select the image file to import. The file type must be TIF or JPG and color images or well-defined monochrome images are recommended. Click **Open**. The image is displayed in the middle of the **Import Full Name/Initials** dialog.
5. Click **Save**. The image is saved as your personal stamp. You can change your personal stamp by repeating this procedure.

To "grab" an area of an FDD image and save it as a personal stamp:

1. View an image in FDD. (This will not work on text or GOS pages.)
2. Select **Personal Stamp** from the **Admin** menu, then select either **Full Name** or **Initials**, then select **Grab**. The **Enter Your Password** dialog opens.
3. Enter your password. The **Grab Full Name/Initials** dialog opens.
4. Click on the page. A selection box displays on the page in the location where you click.
5. Optionally resize the selected area. To do this, select one of the points on the edge of the selection and drag the mouse to increase or decrease the selected area.

   It may be useful to increase the zoom percentage at which the image is displayed when selecting an area on the page. To do this, right-click the page and select a zoom percentage.
6. Click **Save**. The selected area is saved as your personal stamp. You can change your personal stamp be repeating this procedure.

Stamp a Page

To stamp a page with your personal stamp:

1. View a page in FDD.
2. Select **Password Stamp** from the **Note** menu, then select either **Full Name** or **Initials**. The **Enter Your Password** dialog opens.
3. Enter your password. The **Comment** dialog opens.
4. Click on the page. The stamp image displays on the page in the location where you click.
5. Optionally resize the stamp (select one of the points on the edge of the stamp and drag to increase or decrease its size.

   It may be useful to increase the zoom percentage at which the image id displayed when stamping a page. To do this, right-click the page and select a zoom percentage.
6. Enter a **Comment** for the note.
7. Click **OK** to add the note to the page.

Personal stamp notes automatically display each time the page is viewed. For verification, your user name and the datetime stamp (of the time you created the note) display in the lower left-hand corner of the note.

View Page Notes

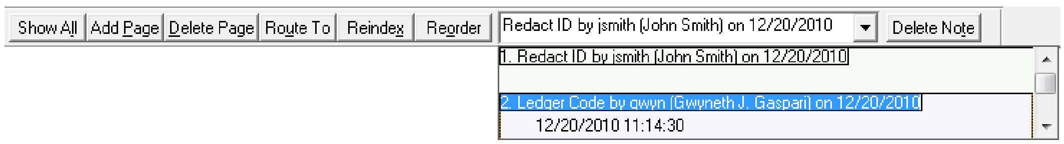
Page and document notes can be viewed from the **FDD Note Bar**. See View All Notes for more information.

Page notes can also be viewed from the page note list in the page control bar.

To view a page note from the page note list:

1. View a page.
2. Display the entries in the page note list by clicking the down arrow.

If the page has a text note, the first five lines of the text note display in the note list.



3. Select a page note in the list. The note is displayed and/or opened.

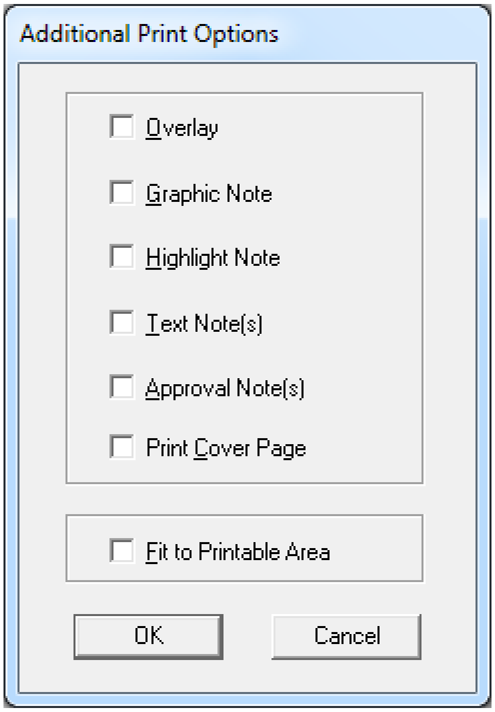
   Graphic style notes display on the page (i.e. graphic notes, highlight notes, redaction notes, image stamps, and user stamps).

   Text style notes display in a note window (i.e. text notes, keyed text notes, UTR notes, approval notes, and text stamps).

Print Page Notes

To print a page note:

1. View a page.
2. Select **Print** from the **File** menu. The **Print** dialog opens.
3. Choose the desired print settings and click **OK**. The **Additional Print Options** dialog opens.



4. Select any desired option:
   - Check the **Graphic Note** option to print all *displayed* graphic notes for the selected pages.
   - Check the **Highlight Note** option to print all *displayed* highlight notes for the selected pages.
   - Check the **Text Note(s)** option to print all text notes for the selected pages.

     Note: The text of a long page text note wraps on the printout based on the line length configured in the **Width** setting in the **Import Main** dialog (under **File>Acquire>Import**).
   - Check the **Approval Note(s)** option to print all approval notes for the selected pages.
5. Click **OK.**

See Print Documents for more information on print options.

Delete Page Notes

To delete a page note:

1. View a page.
2. Open the page note list (click the down arrow).

3. Select a page note.
4. Click the **Delete Note** button on the page control bar.
5. Click **OK** to the warning prompt. The note is deleted.

To delete a sticky note, right-click on the icon and select **Sticky Notes>Delete**.

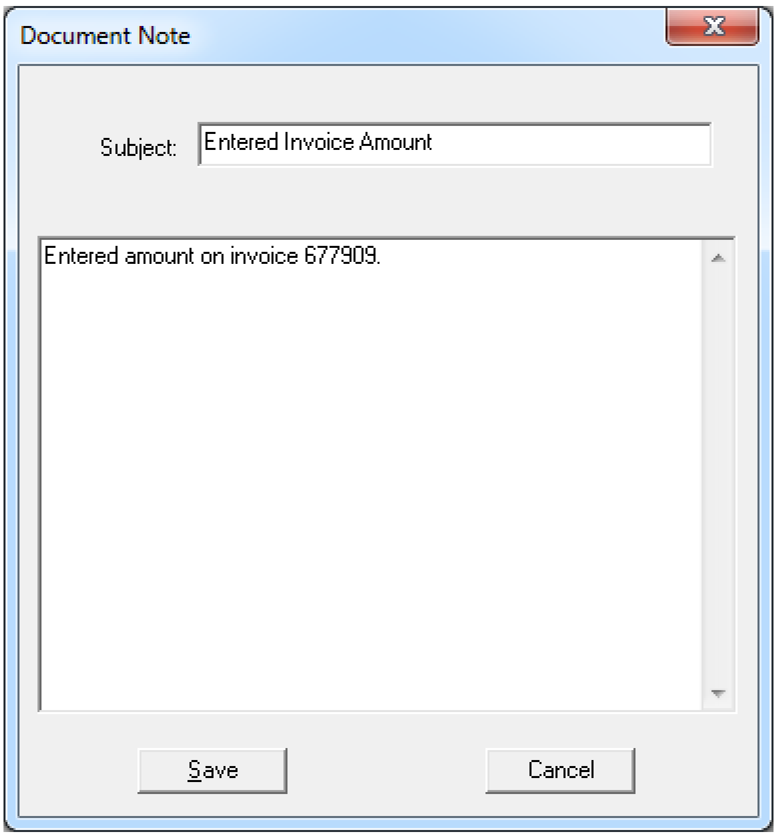
Document Notes

Document Notes

Document notes are composed of text and attached to an entire document or folder. You can use the blog bar to create and manage document notes (see Blog Bar for more information).

Create a document note:

1. Retrieve a document or folder. See Search for Documents for instructions on retrieving documents.
2. Right-click the document or folder in the file cabinet grid and select **New Note**. The **Document Note** window opens.
3. Enter the **Subject** of your note.
4. Enter the text of your note.



5. Click **Save**. The document note is saved.

View a document note:

Page and document notes can be viewed from the **FDD Note Bar**. See View All Notes for more information.

Document notes can also be viewed in the **Document Note** grid.

To view document notes in the document history note grid:

1. Retrieve a document or folder. See Search for Documents for instructions on retrieving documents.
2. Right-click the document or folder in the file cabinet grid and select **Notes**. The **Document Note** grid opens, showing all document notes for the document or folder. Note that both regular document notes and workflow annotations (document notes added during workflow) are shown in the document note grid.

Edit a document note:

1. Retrieve a document or folder. See Search for Documents for instructions on retrieving documents.
2. Right-click the document or folder in the file cabinet grid and select **Notes**. The **Document Note** grid opens, showing all document notes for the document or folder. Note that both regular document notes and workflow annotations (document notes added during workflow) are shown in the document note grid.
3. Only the content of the note, in the column **Text Message**, is editable. Right-click the note content you want to change and select **Edit**.
4. Change the text as desired. When you have finished editing the note, hit the **Enter** button on your keyboard or click on another field.
5. Right-click the note content you just edited and select **Save**. Your changes to the note will be saved.

Delete a document note:

1. Retrieve a document or folder. See Search for Documents for instructions on retrieving documents.
2. Right-click the document or folder in the file cabinet grid and select **Notes**. The **Document Note** grid opens, showing all document notes for the document or folder. Note that both regular document notes and workflow annotations (document notes added during workflow) are shown in the document note grid.
3. Right-click the document note in the document note grid and select **Delete**.
4. Answer **OK** to the confirmation prompt. The note is deleted.

Note: The term "document note" applies to any note attached to an entire document or folder. The term "document note" is used to differentiate the note type from page notes, which are applied only to a single page within a document.

Sign a Document

Signature notes are a type of document note. A signature note contains information that identifies both the signer and the makeup of the document.

When signing a document in FDD, you have the option to apply a personal stamp (an image of your full name) to a page of the document. To do this, you must configure your personal stamps prior to signing the document. See Personal Stamps for instructions.

To sign a document:

1. Display the signature control bar by selecting **Signature Control** from the **View** menu.
2. Optionally add personal stamps to any page of the document by either clicking the initials icon on the signature control bar or choosing **Note**>**Personal Stamp**.
3. Click the **Sign** icon on the signature control bar. The **Enter Your Password** dialog opens.

   Alternatively, use the keyboard shortcut **ALT+SHIFT+S**.
4. Enter your password and click **OK**. The cursor changes to a signature tool and the **Comment** dialog opens.
5. Click on the page. Your full name personal stamp image displays on the page in the location where you click.
6. Optionally resize the stamp (select one of the points on the edge of the stamp and drag to increase or decrease its size).

   It may be useful to increase the zoom percentage at which the image is displayed when stamping a page. To do this, right-click the page and select a zoom percentage.
7. Enter a **Comment** for the signature.
8. Click **Sign** to add the signature to the document.

All personal stamps added before you signed and when you signed become part of your signature.

Verify a Signature

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

To check the validity of a signature:

1. Select the signature in the drop-down list on the signature control bar.
2. Click the **Verify** icon . A window opens identifying whether the signature is valid. If the signature is not valid, the reason for invalidation is stated.

   When a signature is invalid, a red "X" is marked through each of the personal stamps on the pages of the document.

A signature is invalidated if:

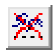
- Pages are added to the document.
- Pages are deleted from the document.
- Pages are reordered.
- Any of the personal stamps are modified or deleted.

Note: You can change your preferences to display a signature invalidation warning by checking the **Signature Invalidation** option on the **Warnings** tab of the **Preferences** dialog (**Admin** menu>**Preferences**). If enabled, you will receive a warning when a pending operation might invalidate the digital signature applied to a document. Operations that will invoke this warning are adding pages, deleting pages, reordering pages and deleting page signatures or initials.

Delete a Signature

Personal stamps and document signatures can only be deleted by either the creator of the note or the "fdd" user.

To delete a signature:

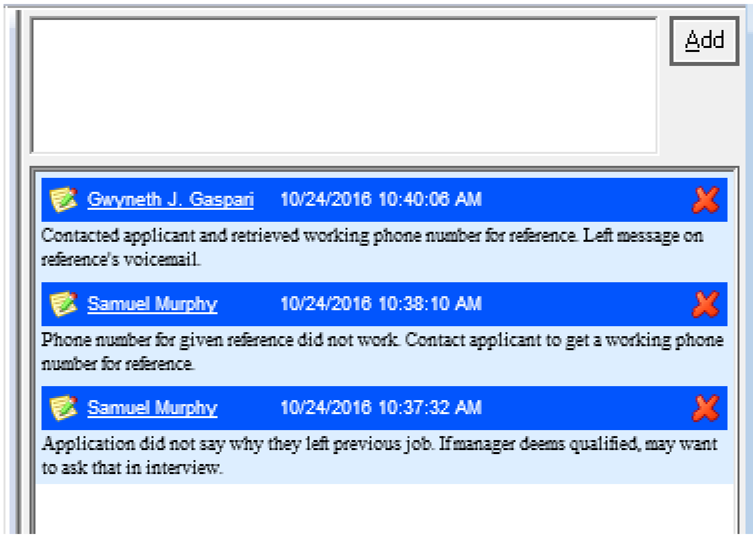
1. Select the signature in the drop-down list on the signature control bar.
2. Click the **Delete** icon . The signature and all of the personal stamps are deleted.

Blog Bar

Use the blog bar to create and manage document text notes.

To display the blog bar, view a document then select **View>Blog Bar**. The blog bar displays.

The blog bar displays document text notes, which are created on the blog bar itself or through another method (see Document Notes for more information). The notes are displayed in a "blog" fashion, arranged in chronological order from newest at the top to oldest at the bottom. Each note has the name of the user that created it as well as a timestamp indicating when the note was created.



To create a note:

- In the field at the top of the blog bar, type the text of your note then click the **Add** button. The note is added and displays in the blog bar.

To delete a note:

- In the header of the note you wish to delete, click the  button. The note is deleted and is removed from the blog bar.

To send an email to a note's creator:

- Click the name of the user who created the note. A new email is started, addressed to the user you clicked.

View All Notes

Page and document notes can be viewed from the **Note Bar**.

The note bar shows the number of page notes and document notes associated with a document. An **All Notes** dialog can be opened from the note bar, listing all notes for the document. When viewing a multiple page document, the **All Notes** dialog allows you to access all notes associated with the document from any page.

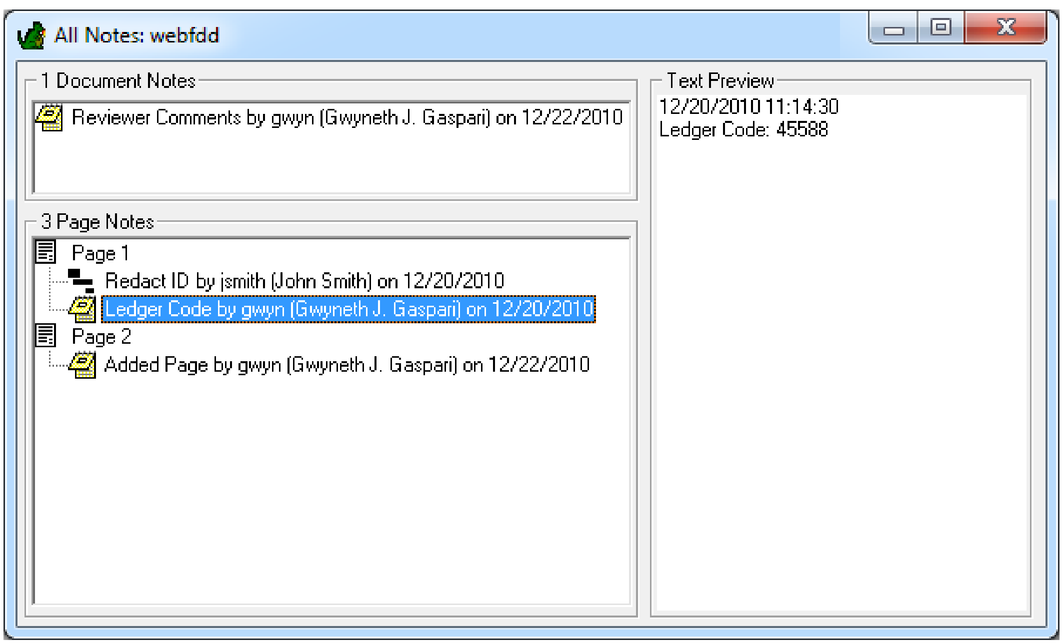
To display the note bar, select the **Note Bar** option from the **View** menu.

To view a note using the note bar:

1. View a document. The note bar shows the number of signature notes, document notes and page notes associated with the document. The page note count shows both the total number of page notes for the document and the number of page notes on the current page.
2. Click one of the icons - signature, document note or page note - in the note bar. The **All Notes** dialog opens, listing all document notes and page notes. (Signature notes are listed as document notes.)
3. To view a document note, select the note in the list. The document note text is shown in the **Text Preview** pane in the **All Notes** window.
4. To view a page note, select the note in the list. The associated page is displayed in the FDD view window and the note is displayed and/or opened. If the selected note is a text note, the page note text is shown in the **Text Preview** pane in the **All Notes** window.

   Graphic style notes display on the page (i.e. graphic notes, highlight notes, redaction notes, image stamps, and user stamps).

   Text style notes display in a note window (i.e. text notes, keyed text notes, UTR notes, approval notes, and text stamps).



4. To close the **All Notes** window, click the **X** in the upper right-hand corner of the window.

Print, E-mail, and Export Documents

Print Documents

The **Print** option uses print drivers supplied with the Windows operating system.

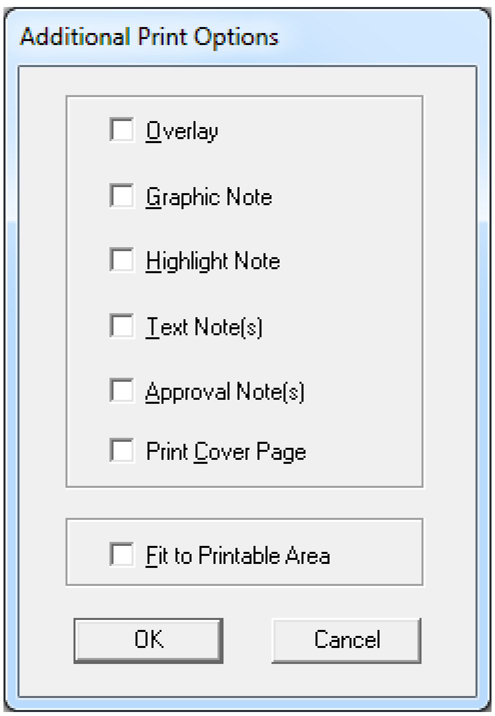
You can print to printers that are configured on your computer. See your system administrator if you have questions about what printers are available.

To display a print preview:

1. View a batch or document.
2. Select **Print Preview** from the **File** menu.

To print:

1. View a batch or document.
2. Select **Print** from the **File** menu. The **Print** dialog opens.
3. Select a printer.
4. Specify whether to print all pages or a page range.
5. Specify the number of copies to print.
6. Click **OK**. The **Additional Print Options** window opens.



7. Check any of the following options:
   - **Overlay:** Prints the overlay on the selected pages. See Overlays for more information.
   - **Graphic Note:** Prints all *displayed* graphic notes for the selected pages. See Graphic Notes for more information.
   - **Highlight Note:** Prints all *displayed* highlight notes for the selected pages. See Highlight Notes for more information.
   - **Text Note(s):** Prints all text notes for the selected pages. See Text Notes for more information.

     Note: The text of a long page text note wraps on the printout based on the line length configured in the **Width** setting in the **Import Main** dialog (under **File>Acquire>Import**).

- **Approval Note(s):** Prints all approval notes for the selected pages. See Approval Notes for more information.
- **Print Cover Page:** Prints a cover page that has information about the document, including the database connect string, document creation user, document creation time, print user, host from which the document was printed, print time, number of pages, file cabinet, and the index values.
- **Fit to Printable Area:** Scales the images to fit the printable area.

8. Click **OK** to print.

Network Printing

The **File**>**Network Print** option uses print drivers supplied by the network printer. This option is available if your system has a Feith Network Print server.

Feith Network Print is an optional FDD component. See Optional Components for more information.

Fax from FDD

If an appropriate fax driver has been installed on your computer, you can fax from FDD. See your system administrator if you have questions about faxing.

To fax from FDD:

1. View a batch or document.
2. Select **Print** from the **File** menu. The **Print** dialog opens.
3. Select the fax printer.
4. Click **OK**. The fax application software is launched.
5. Click the **Send** button. The **Send Fax** dialog opens.
6. Click **OK** to send the fax.

E-mail from FDD

The **send** option e-mails a page or document from FDD using any standard mail client that supplies MAPI services.

Page notes and overlays are not included in the e-mail attachments.

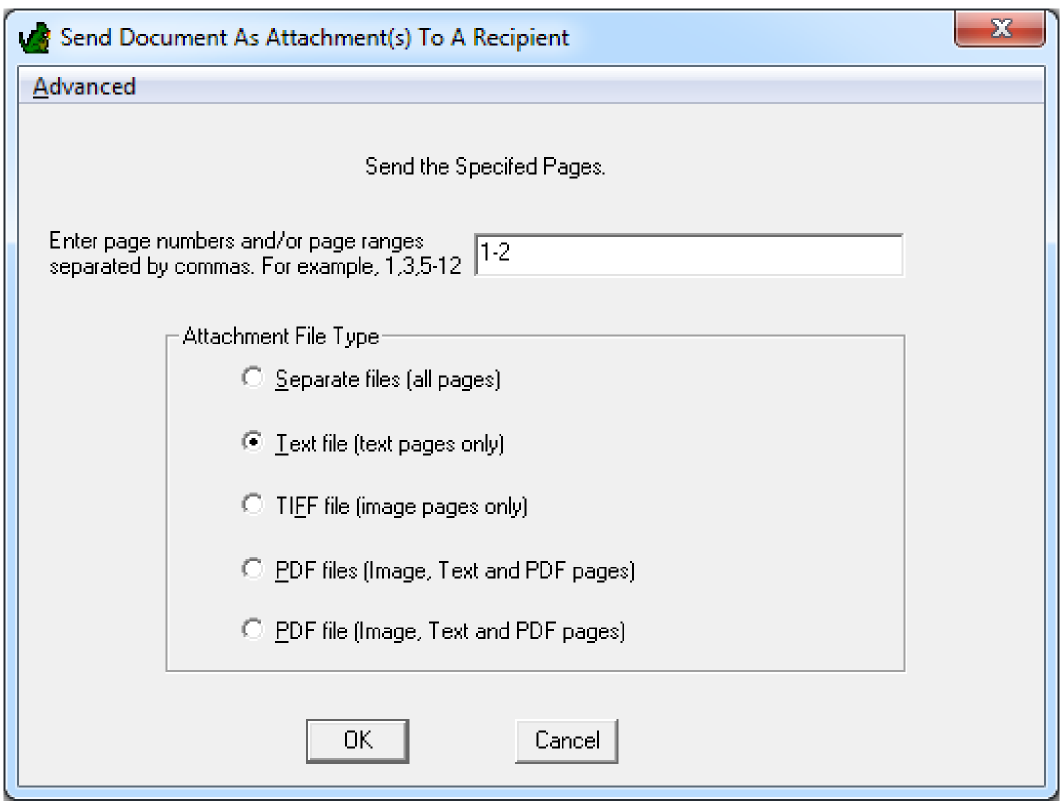
To e-mail a page:

1. View the page.
2. From the **File** menu, select **Send**, then select **Page**. A **Verify Attachments** prompt opens, indicating the size of the attachments to be sent.
3. Click **OK** to the **Verify Attachments** prompt to proceed. (To cancel, click **Cancel**.) A new message opens in your default mail client. The selected page is attached to the message.
4. Address and send the message.

To e-mail a document:

1. View the document.

   If you want to send multiple documents, view all the documents you want to export. See View FDD Documents for more information on viewing multiple documents.
2. From the **File** menu, select **Send**, then select **Document**. The **Send Document as Attachment(s) to a Recipient** dialog opens.



3. If you are attaching the document as separate pages or as a multi-page text file, enter the page range to attach.

4. Choose the **Attachment File Type**. Choices are:
    - **Separate files (all pages):** Each page in the document will be attached as a separate file.

      If you attach the pages of the document as separate files, each page will be attached according to how it is stored in FDD:
        - A text page will be attached as a .txt file.
        - A GOS page will be attached in its native format. GOS pages are general Objects which are Windows-type electronic files stored in FDD, such as word-processing documents or spreadsheets.
        - An image page saved with Group3 or Group4 compression will be attached as a .tif file.
        - An image page saved with jpg compression will be attached as a .jpg file.
        - A monochrome image page saved with no compress will be attached as a Group4 .tif file.
        - A grayscale or color image page saved with no compression will be attached as a .jpg file.
    - **Text file (text pages only):** The text pages in the document will be attached as a single multi-page text file. In the **Advanced** menu, select the desired encoding for the attached file. Available options are: **ANSI**, **UTF8**, **UCS2**, and **UCS2 Big Endian**.
    - **TIFF file (image pages only):** The image pages in the document will be attached as a single multi-page TIFF file. This option is disabled if you are viewing a document with redacted pages.
    - **PDF files (Image, Text, and PDF pages):** All image, text, and PDF pages in the document will attached as a single multi-page PDF. If you are attaching multiple documents, each document is attached as a separate PDF. This option requires WebFDD. In addition, this option is disabled if you are viewing a document with redacted pages.
    - **PDF file (Image, Text, and PDF pages):** All image, text, and PDF pages in the document will be attached as a single multi-page PDF. If you are attaching multiple documents, all the documents will be attached in a single PDF. This option requires WebFDD. In addition, this option is disabled if you are viewing a document with redacted pages.
5. Click **OK**. A **Verify Attachments** prompt opens, indicating the size of the attachments to be sent.
6. Click **OK** to the **Verify Attachments** prompt to proceed. (To cancel, click **Cancel**.) A new message opens in your default mail client. The selected document is attached to the message, in the selected attachment file type.
7. Address and send the message.

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

To e-mail a page URL:

1. View a page.
2. From the **File** menu, select **Send**, then select **Page URL**. A new message opens in your default mail client. A WebFDD URL to the selected page is included in the body of the message.
3. Address and send the message.

This feature is available only if you have WebFDD. See Optional Components for more information on WebFDD.

To e-mail a document URL:

1. View a document.
2. From the **File** menu, select **Send**, then select **Document URL**. A new message opens in your default mail client. A WebFDD URL to the selected document is included in the body of the message.
3. Address and send the message.

This feature is available only if you have WebFDD. See Optional Components for more information on WebFDD.

To e-mail a page FRL (FDD URL):

1. View a page.
2. From the **File** menu, select **Send**, then select **Page FRL File**. A new message opens in your default mail client. An FRL to the selected page is attached to the message.
3. Address and send the message.

The recipient can double-click the .frl attachment to open the page in FDD.

To e-mail a document FRL (FDD URL):

1. View a document.
2. From the **File** menu, select **Send**, then select **Document FRL File**. A new message opens in your default mail client. An FRL to the selected document is attached to the body of the message.
3. Address and send the message.

The recipient can double-click the .frl attachment to open the document in FDD.

To e-mail a document to the value of a file cabinet field:

1. Open the file cabinet grid and search for documents.
2. Right-click a row and select **Send Mail To**. A new message opens in your default mail client.

   The selected file cabinet field value is filled into the **To:** field of the message, a WebFDD URL to the document is included in the body of the message, and an FRL to the document is attached to the message.
3. Address and send the message.

This feature is designed to be used if you have a file cabinet field that stores e-mail addresses.

To e-mail a document to the value of a workflow form field:

1. Open the workflow form and retrieve a document.
2. Right-click the workflow form and select **Send Mail To**. A new message opens in your default mail client.

   The selected file cabinet field value is filled into the **To:** field of the message, a WebFDD URL to the document is included in the body of the message, and an FRL to the document is attached to the message.
3. Address and send the message.

This feature is designed to be used if you have a file cabinet field that stores e-mail addresses.

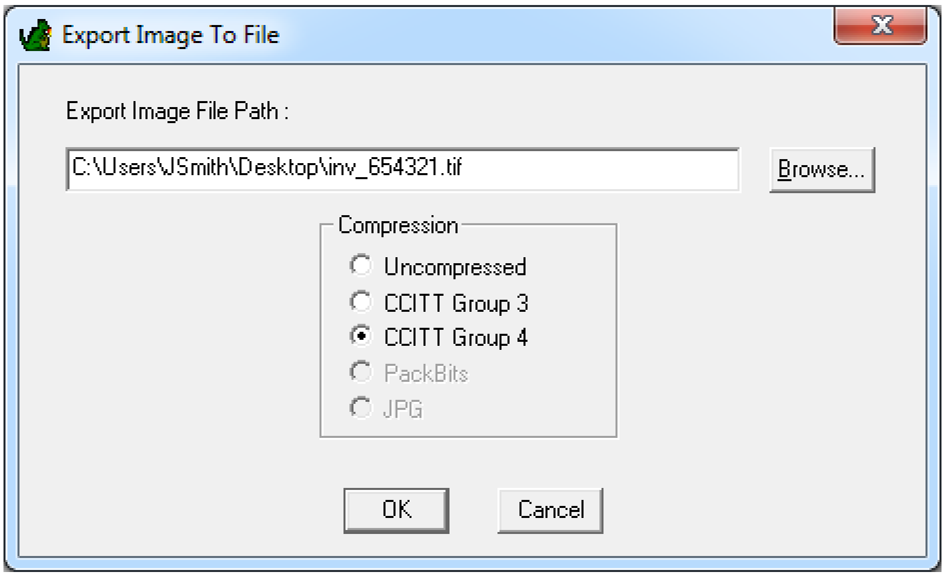
Export Pages

The **Export Page** option exports the page currently displayed in FDD.

The export page procedure varies slightly depending on whether you are exporting image, text or GOS pages.

To export an image page:

1. View the image.
2. From the **File** menu, select **Export**, then select **Export Page**. The **Export Image To File** dialog opens.



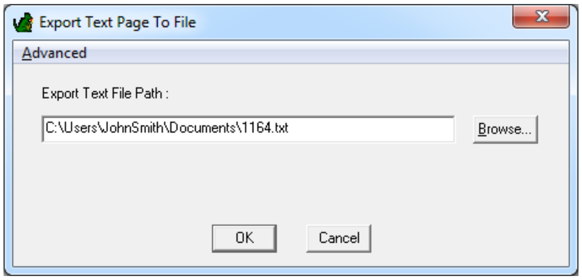
3. Click **Browse** to select a destination directory for the exported file.

   The suggested directory is the **Export Directory** preference setting. Changing the directory during export updates this setting.

   The suggested file name is the batch name (if exporting from a batch) or the first column index value (if exporting from a document).
4. Select a **Compression** type. The compression options are limited depending on the image type you are exporting.
   - Choose **Uncompressed** for raw data.
   - Choose **CCITT Group 3** for monochrome images.
   - Choose **CCITT Group 4** for monochrome images.
   - Choose **Pack Bits** for grayscale or color images.
   - Choose **JPG** for grayscale or color images.
5. Click **OK**. The page is exported.

To export a text page:

1. View the text page.
2. From the **File** menu, select **Export**, then select **Export Page**. The **Export Text Page To File** dialog opens.



3. Click **Browse** to select a destination directory for the exported file.

   The suggested directory is the **Export Directory** preference setting. Changing the directory during export updates this setting.

   The suggested file name is the batch name (if exporting from a batch) or the first column index value (if exporting from a document).
4. In the **Advanced** menu, select the desired encoding for the export file. Available options are: **ANSI**, **UTF8**, **UCS2**, and **UCS2 Big Endian**.
5. Click **OK**. The page is exported.

To export a GOS page:

1. View the GOS page.
2. From the **File** menu, select **Export**, then select **Export Page**. The **Export GOS Object To File** dialog opens.

3. Click **Browse** to select a destination directory for the exported file.

   The suggested directory is the **Export Directory** preference setting. Changing the directory during export updates this setting.

   The suggested file name is the batch name (if exporting from a batch) or the first column index value (if exporting from a document).
4. Click **OK.** The page is exported.

Note: By default, the suggested file name for the exported page is the batch name (if exporting from a batch) or the first column index value (if exporting from a document). As an alternative, user preferences can be changed so the Doc ID (the unique ID of the batch or document) is the suggested file name. See Change Preferences for instructions.

Export Documents

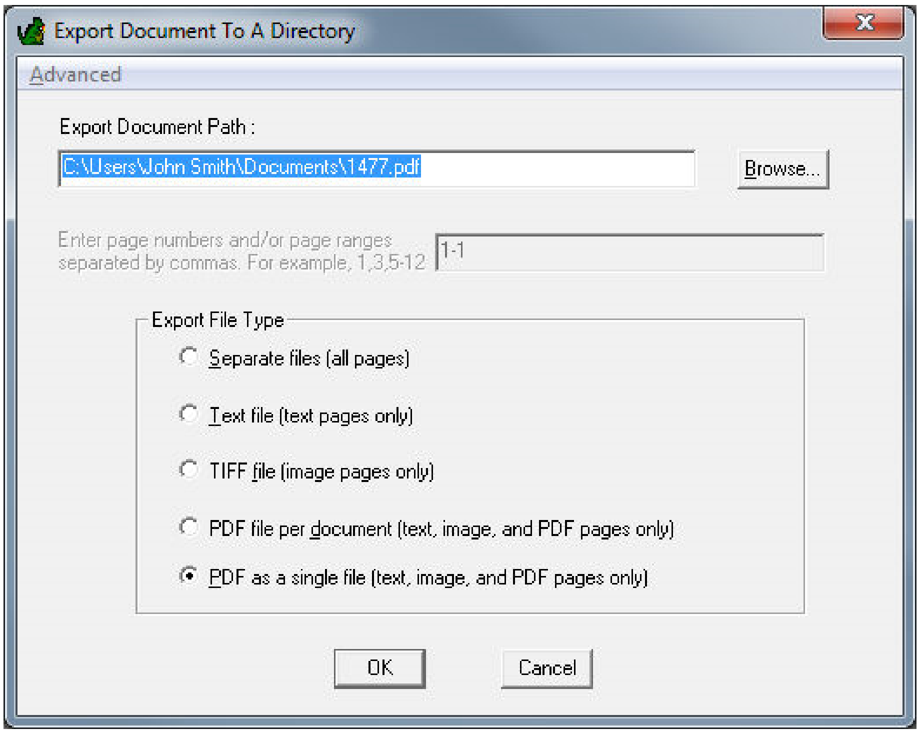
The **Export Document** option exports a range of pages in a document. The default page range includes all pages in the document.

To export a document:

1. View the document.

   If you want to export multiple documents, view all the documents you want to export. See View FDD Documents for more information on viewing multiple documents.

2. From the **File** menu, select **Export**, then select **Export Document.** The **Export Document To A Directory** dialog opens.



3. Click **Browse** to select a destination directory for the exported file(s).

   The suggested directory is the **Export Directory** preference setting. Changing the directory during export updates this setting.

   The suggested file name is the batch name (if exporting from a batch) or the first column index value (if exporting from a document). If exporting the pages as separate files, the file names will include a sequential number.

4. Enter the page range to export. The default page range includes all pages in the document.
5. Choose the **Export File Type**. Choices are:

   - **Separate files (all pages):** Each page in the document will be exported as a separate file. Each file name will include a sequential number (e.g. **Smith_01.txt**, **Smith_02.txt**, etc).

     If you export the pages of the document as separate files, each page will be exported according to how it is stored in FDD:

     - A text page will be exported as a .txt file.

- A GOS page will be exported in its native format. GOS pages are General Objects which are Windows-type electronic files stored in FDD, such as word-processing documents or spreadsheets.
- An image page saved with Group3 or Group4 compression will be exported as a .tif file.
- An image page saved with jpg compression will be exported as a .jpg file.
- A monochrome image page saved with no compression will be exported as a Group4 .tif file.
- A grayscale or color image page saved with no compression will be exported as a .jpg file.

- **Text file (text pages only):** The text pages in the document will be exported as a single multi-page text file. In the **Advanced** menu, select the desired encoding for the export file. Available options are: **ANSI**, **UTF8**, **UCS2**, and **UCS2 Big Endian**.
- **TIFF file (image pages only):** The image pages in the document will be exported as a single multi-page TIFF file. This option is disabled if you are viewing a document with redacted pages.
- **PDF file per document (Image, Text, and PDF pages only):** All image, text, and PDF pages in the document will be exported as a single multi-page PDF. If you are exporting multiple documents, each document is exported as a separate PDF. This option requires WebFDD. In addition, this option is disabled if you are viewing a document with redacted pages.
- **PDF as a single file (Image, Text, and PDF pages only):** All image, text, and PDF pages in the document will be exported as a single multi-page PDF. If you are exporting multiple documents, all the documents will be exported in a single PDF. This option requires WebFDD. In addition, this option is disabled if you are viewing a document with redacted pages.

6. Click **OK**. The document is exported; you will receive a success message when the export is complete.

Export Selected Rows

You can also export one or more documents in PDF format using **Export Selected Rows**.

To export documents using the **Export Selected Rows** option:

1. Select one or more documents in the file cabinet grid. Multiple documents can be selected using **CTRL+click** or **SHIFT+click**.
2. Right-click one of the selected rows and select **Export Selected Rows**. There are two sub-options to choose from:
   - **Document Files:** Exports each selected document as a separate PDF file.
   - **One File:** Exports all selected documents as one PDF file.
3. The selected documents are exported.

This feature requires WebFDD. In addition, this option is not supported for GOS pages or documents with redacted pages (documents containing redactions are skipped).

Note: By default, the suggested file name for the exported document is the batch name (if exporting from a batch) or the first column index value (if exporting from a document). As an alternative, user preferences can be changed so the Doc ID (the unique ID of the batch or document) is the suggested file name. See Change Preferences for instructions.

Export Index Values

Copy and paste the index values into another program or export the index values to a CSV file.

Tip: Index data from a CSV file as pageless documents in a file cabinet. See Index from CSV for more information.

To copy some index values:

1. In the file cabinet, select the rows you want to copy. Select multiple rows using **CTRL+click** or **SHIFT+click**.
2. Right-click on one of the selected rows, hover over **Copy** and choose one of the following:
   - **Copy Selected Row Data:** Copy the index values of the selected rows to the clipboard in tab-delimited format. Note that this option does not include the field labels.
   - **Copy Selected Row Data with Labels:** Copy the field labels and index values of the selected rows to the clipboard in tab-delimited format.
3. The selected index values are copied to the clipboard.
4. Paste the data into the desired application, such as Notepad or Microsoft Excel.

To copy all index values currently displays in the grid:

1. In the file cabinet, right-click and select **Copy>Copy All Row Data with Labels**. All the index values in the grid and the field labels are copied to the clipboard in tab-delimited format.
2. Paste the data into the desired application, such as Notepad or Microsoft Excel.

To export index values to a CSV file:

1. In the file cabinet, select the rows you want to export. Select multiple rows using **CTRL+click** or **SHIFT+click**.
2. Right-click on one of the selected rows and select **Export Selected Rows>Selected Row Data as a CSV file**. The index values of the selected documents are exported to a CSV file. Note that this option does not include the field labels.
3. Open the CSV file in the desired application, such as Notepad or Microsoft Excel.

Workflow iQ

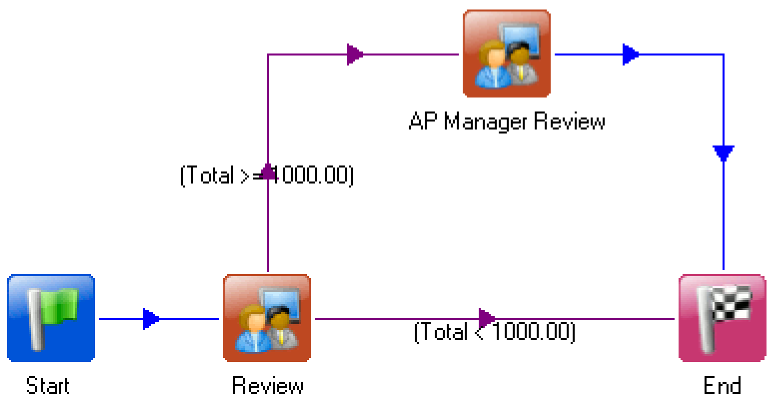
Workflow Overview

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

A workflow is a combination of tasks and routes that moves a 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 (workflow documents and/or folders) 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; users may need to complete indexing information or review a document for approval.

Get started:

- Search for a workflow document
- Retrieve work in a workflow task or 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 Window

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

The **Work To Do** window shows all workflows and workflow tasks to which you have access. To open the **Work To Do** window, select the **Search>Work To Do**.

The **Work To Do** window is divided into two panes:

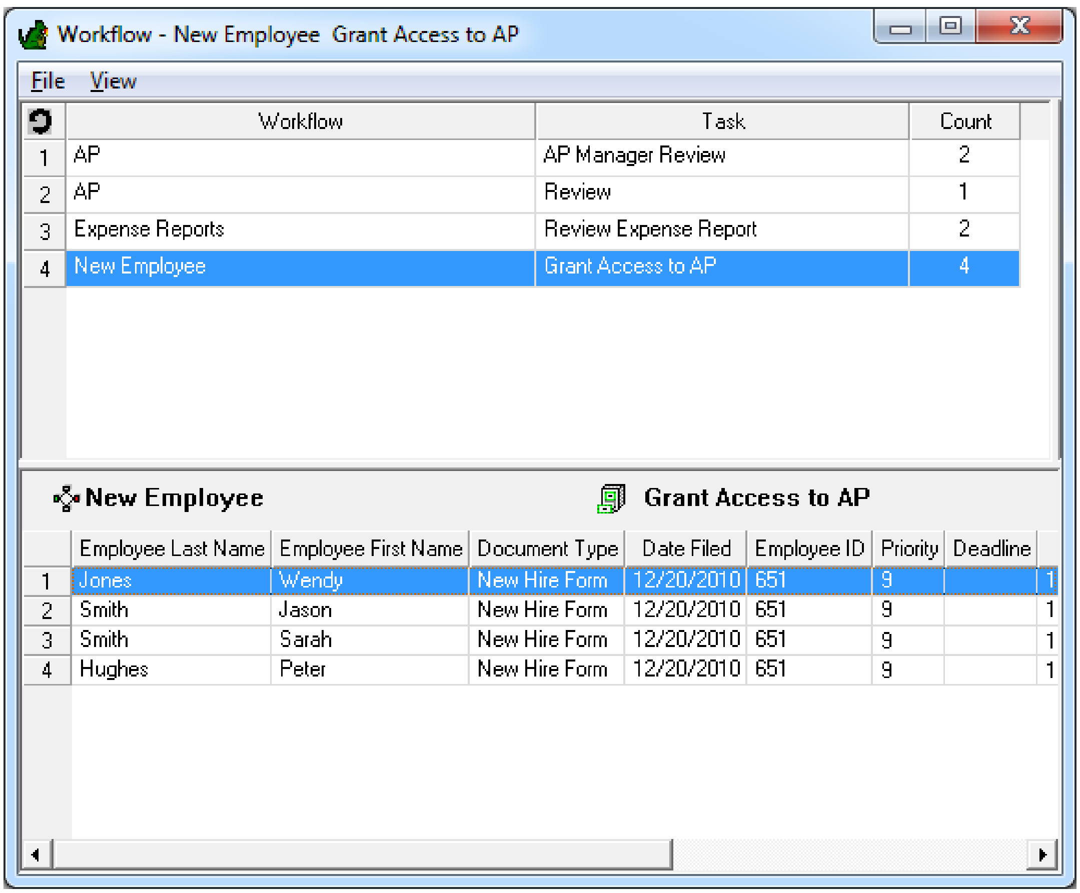
- **The workflow task list.** The workflow task list shows all workflow tasks to which you are assigned. When you select a workflow task, the work items (workflow documents and/or folders) in the task are listed in the bottom pane of the window.

  To color-code the tasks by workflow, select **View>Color Coded Workflows**.

  If you have many work items in Work To Do, it may be desirable to turn off **Show Counts** in the **View** menu. When **Show Counts** is off, the count will only display for the tasks you select.

- **The work item list.** The work item list shows all work items in the selected workflow task.

Example **Work To Do** window:



The **Work To Do** window also has a calendar pane, which can be opened by selecting **View>Show Calendar**. The calendar allows you to search for work items in the selected task by date. Available dates to search on include the creation time of the work item (**Created**), the modification time of the work item (**Modified**), and the deadline date associated with the work item, if applicable (**Deadline**). If you selected a date to search on in the calendar pane, the work item list is further restricted based on the selected date.

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:

- **Done Selected Documents:** Marks the selected documents as **Done**.
- **Document Preview:** Turns on the document preview feature. See Document Preview for more information.
- **Copy Selected Rows:** Copies the index values of the selected rows to the clipboard in tab-delimited format.
- **Copy All Rows:** Copies the index values of all rows (currently listed in the work item list) to the clipboard in tab-delimited format. This option also copies the file cabinet field headers.
- **HTML Export:** Opens an HTML report of the index values of all rows currently listed in the work item list.

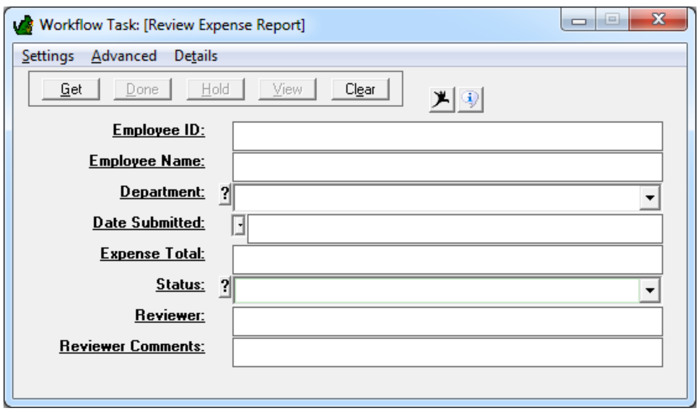
Workflow Tasks

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

Workflows and workflow tasks are displayed on the FDD folder bar under the **Workflows** node.

To open a **workflow task** from the folder bar:

1. Display the FDD folder bar by selecting the **Folder Bar** option from the **View** menu.
2. Double-click the **Workflows** node. The folder bar expands to display all workflows to which you have access.
3. Double-click a workflow. The folder bar expands to list the tasks in this workflow to which you are assigned.
4. Double-click one of the workflow tasks. The workflow task opens.



The Workflow Form Menu Options

Settings menu

OPTION	ACTION
Auto View	Toggles the automatic display of document/folder contents.
Stay With Document	Enables you to stay with the document as it moves through the different tasks. If this option is on, when you **Done** the document, the **Waiting for Document** dialog opens (with the feet animation). When processing is finished the **Tasks** dialog opens, listing all the tasks in which the document exists. Double-click the task in which you want to work the document. The document will open in the selected task and you can proceed working on the document.
Always Show History	Toggles the automatic display of workflow history. If selected, the workflow history grid automatically displays each time a document is retrieved in the task.
Always Show Notes	Automatically displays the **All Notes** dialog when a work item is viewed.
Skip Your Holds	If selected, documents on hold will not be retrieved in the workflow task. When the end of the work to do list is reached, the following message displays: "End of list. You may have workflow records On Hold."

Labels on Top	Places the field name above the field instead of to the left.
Auto Position Form	Automatically places the workflow form dialog over the folder bar control.
View Style	Sets the view style for the task. Select **One Column**, **Two Column** or **Three Column**. (Defaults to **One Column**.)

Advanced menu

OPTION	ACTION
Withdraw	Removes the document from your workflow task. This does not delete the document from FDD.
Delete All	Removes the document from the workflow and deletes it from FDD.
Ad Hoc Route	Opens the **Ad Hoc Route** window so you can move the document to another workflow task.
Priority	Opens the **Priority** window so you can change the workflow document priority. Priority is assigned on a scale of 1 to 9, with 1 being the highest priority.
Deadline	Opens the **Deadline** window so you can change the workflow document deadline.
Annotate	Choose **New Document Note** to open the **Document Note** window so you can add a note. Choose **Document Notes** to open the **Document Note** grid to view notes.
Multi-Index	Opens the file cabinet grid so you can index the entire document into the base file cabinet multiple times. Note that this option is disabled for Forms iQ documents.
Reindex by Page	Opens the file cabinet grid so you can index each page individually into the base file cabinet. Note that this option is disabled for Forms iQ documents.

Details menu

OPTION	ACTION
Leaps	Opens a sub-menu with the following choices: **Predefined Leaps:** Opens the **Predefined Leaps** window and lists predefined leaps. There are five types of leaps: **Application Leap**, **File Cabinet Leap**, **OCR Leap**, **SQL Leap**, and **URL Leap**. You can also click the **Predefined Leaps**  button to open the **Predefined Leaps** window. Note that this button only appears if there are predefined leaps that exist for the task. **Dynamic Leaps:** Performs a dynamic leap. **Where Is It:** Performs a document leap. See Leaps for more information.

History	Opens the **Workflow History** grid. This grid shows the tasks the document has passed through in the workflow.
Instructions	Opens the **Instructions** for working in this workflow task. You can also click the **Instructions** button to open the **Instructions** for the task. Note that this button only appears if instructions exist for the task.

Buttons

OPTION	ACTION
Get	Retrieves the next available document in the workflow task.
Done	Submits the document. The document is moved to the next task in the workflow.
Hold/Release	Toggles between **Hold** and **Release**. Clicking **Hold** places the document on hold for you. Clicking **Release** removes the hold.
View	Displays the document in the FDD view window. For a folder, pressing **View** retrieves and displays the first document listed in the folder contents.
Clear	Removes the document from the workflow form. This does not delete or submit the document; the document remains available in this workflow task.
Predefined Leaps	Opens the **Predefined Leaps** window, where you can do a leap. Note that this button only appears if there are predefined leaps that exist for the task.
Instructions	Opens the **Instructions** for the task. Note that this button only appears if instructions exist for the task.

Tip: Press **ALT**+**B** to hide the workflow task from view (when viewing documents). Press **ALT+B** again to bring the workflow task back to the front.

Search for Workflow Documents

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

You can search for workflow documents in either the Work to Do Window or from a workflow task. See Work To Do Window and Workflow Tasks for more information.

To search for work by workflow task in the Work to Do Window:

1. Select **Work to Do** from the **Search** menu. The **Work to Do** window opens. All workflow tasks to which you are assigned are listed in the top pane of the window. By default, the first workflow task in the list is selected, and the documents in this task are listed in the bottom pane of the window.
2. Select a workflow task in the top pane of the **Work To Do** window. Available work in this task is listed in the bottom pane.

   The document list in the bottom pane can be sorted by clicking on any of the column headers. Multiple column sort is supported.
3. Double-click a document in the list. The document opens in the workflow task. See Workflow Tasks for more information.
4. Once you have opened the document in the workflow task, process it as needed and click **Done** to submit it. The next available document in the workflow task is retrieved.
5. If needed, you can return to the **Work To Do** window to select another document from the list.

To search for work by date in the Work to Do Window:

1. Select **Work to Do** from the **Search** menu. The **Work to Do** window opens. All workflow tasks to which you are assigned are listed in the top pane of the window. By default, the first workflow task in the list is selected, and the documents in this task are listed in the bottom pane of the window.
2. Select a workflow task in the top pane of the **Work To Do** window.
3. If the calendar pane is not open, select **View>Show Calendar**.
4. Select any of the dates to search on in the calendar pane.

   You can search on the **Created**, **Modified**, and **Deadline** dates. In addition, you can search on any file cabinet date field included in the selected workflow task.

   The calendar displays all work for the current month; all dates that have work are shaded green. Use the arrows to change the month or year.

4\. Double-click on a date. Available work for the selected date is listed in the bottom pane.

   The document list in the bottom pane can be sorted by clicking on any of the column headers. Multiple column sort is supported.

5. Double-click a document in the list. The document opens in the workflow task. See Workflow Tasks for more information.
6. Once you have opened the document in the workflow task, process it as needed and click **Done** to submit it. The next available document in the workflow task is retrieved.
7. If needed, you can return to the **Work To Do** window to select another document from the list.

To search for work in the workflow task:

1. Display the FDD folder bar (select **Folder Bar** from the **View** menu).
2. Double-click the **Workflows** node. The folder bar expands to display all workflows to which you have access.
3. Double-click a workflow. The folder bar expands to list the tasks in this workflow to which you are assigned.
4. Double-click one of the workflow tasks. The workflow task opens.
5. Press **Get** to retrieve a document.

   You can optionally enter search criteria in the workflow form fields before pressing **Get**. If you enter search criteria before pressing **Get**, only the documents matching the search criteria will be retrieved.
6. Once you have opened a document in the workflow task, process it as needed and click **Done** to submit it. The next available document in the workflow task is retrieved.

Process Workflow Documents

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

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

You can process documents individually, or you can process multiple documents at one time.

To process a single workflow document:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.

   Note: If an integration link launches, see Integration Links instead for how to process a work item in a task with an integration link.
2. Press the **Done** button.
3. If you are prompted to select a **Manual Route**, select a route or routes from the list and press **OK.**
   - If you are selecting from **single** routes, choose one, and only one, of the routes.
   - If you are selecting from **multiple** routes, choose at least one of the routes.
   - If you are selecting from **optional** routes, you can choose one, more than one, or none of the routes.
4. The workflow document is processed and routed to the next task in the workflow.

To process multiple workflow documents:

1. Search for workflow documents in the **Work to Do** window. See Search for Workflow Documents for instructions.
2. Select the workflow documents you wish to process, then right-click the rows and select **Done Selected Documents**.

   To select multiple workflow documents, hold down the **CTRL** key while clicking on the rows.

   Note the **Done Selected Documents** option is disabled if you do not have the **Bulk Workflow Done** task permission.
3. Answer **Yes** to the confirmation prompt.
4. If you are prompted to select a **Manual Route**, select a route or routes from the list and press **OK**. All selected workflow documents will be routed according to the selection.
   - If you are selecting from **single** routes, choose one, and only one, of the routes.
   - If you are selecting from **multiple** routes, choose at least one of the routes.
   - If you are selecting from **optional** routes, you can choose one, more than one, or none of the routes.
5. The workflow documents are processed and routed to the next task in the workflow. A message displays the number of workflow documents that were successfully processed and the number of errors, if any, that occurred.

   If a workflow document cannot be successfully processed as part of a bulk workflow done, the document remains in the task. The reason for the error is typically a problem with the document indexing values. For example, a mandatory field may be null. Try processing this document on an individual basis by retrieving it in the workflow task, correcting the error, and clicking **Done**.

   Reasons for unsuccessful processing may include:
   - A mandatory field is null.
   - A value is not found in the lookup table assigned to a field.

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 workflow document:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Enter or change a value in any field. There are many options for modifying index values:
    - Type into the fields.
    - Use the **TAB** key to move from one field to the next. Use **SHIFT+TAB** to move back up.
    - Date fields have date selection controls. Also note that a value of 12:00 AM in a datetime field is stored as 0:00 AM.
    - Fields with lookup tables have drop-down lists containing the lookup values. You can also click the **?** button to select a lookup value. See Lookup Tables for more information.
    - Select from a list of unique values that already exist for that file cabinet field by placing your cursor in the field, right-clicking in task area, and selecting **Distinct Values**. See Distinct Values for more information.
    - In **Highlight Mode** on text and TIF pages, highlight a value on the page itself and select a field to insert the value. See Highlight Mode for more information.
    - If entering multiple values into a list field, enter each value separated by a semicolon or click the ... button to add values. See List Fields for more information.
    - Note that some index fields may be read-only and you will not be able to enter a value in them.
    - To undo changes in the field, press **CTRL**+**Z**.
3. Close the workflow document by doing any of the following:
    - Pressing **Get** to retrieve the next document.
    - Pressing **Done** to submit the document.
    - Ad hoc routing the document to another task.
    - Sending the document back to the previous task.
    - Exiting the workflow form.
4. Answer **Yes** to the "Do you want to modify the index information?" prompt to save your changes to the workflow document index values.

Withdraw Document from a Workflow

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

Use the **Withdraw** option to remove a document from a workflow. Use the **Delete All** option to withdraw the workflow document and delete it from FDD.

To withdraw a document from the workflow task:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Select **Withdraw** from the **Advanced** menu. If the workflow document exists only in the current workflow task, it is withdrawn.
3. If the document exists in multiple tasks, you are prompted with "The workflow document exists in other file cabinet tasks. Do you want to withdraw them all?" Answer **Yes** to withdraw the document from the entire workflow. Answer **No** to withdraw the document from the current task only.

To withdraw a document from the workflow base file cabinet:

1. Retrieve the document in the workflow base file cabinet. See Search for Documents for instructions on searching in file cabinets.
2. Right-click the file cabinet grid and select **Workflow**>**Withdraw from Workflow**. The **Workflows** dialog opens, listing all workflows in which the document exists.
3. Select a workflow in the list and click **OK**. The document is withdrawn from the selected workflow.

To delete a workflow document from the workflow task:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Select **Delete All** from the **Advanced** menu. The document is removed from the workflow and deleted from FDD.

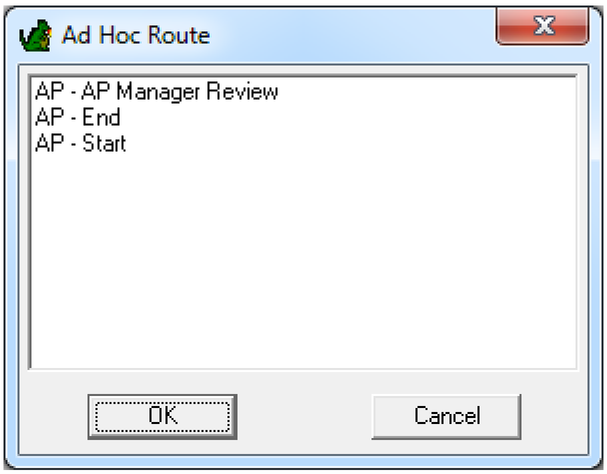
Ad Hoc Route Document

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

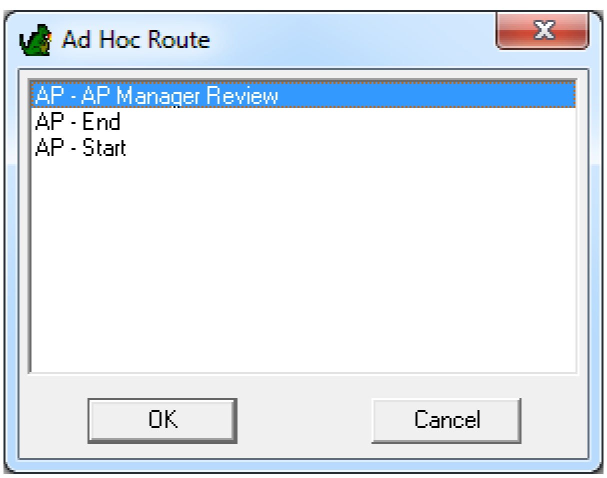
Use **ad hoc routes** to move a document from one workflow task to another task on an as-needed basis.

To ad hoc route a workflow document:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Select **Ad Hoc Route** from the **Advanced** menu. The **Ad Hoc Route** window opens, listing all tasks in the current workflow and all tasks in any workflow built on the same base file cabinet (except for the tasks the document is currently in).



3. Choose the workflow task you want to route to.



4. Click **OK**. The document is routed to the selected task; the next document in the workflow task is retrieved.

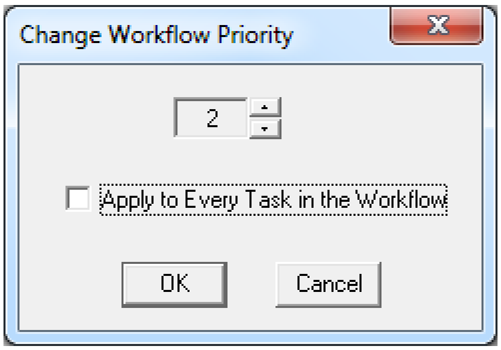
Change Document Priority

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

Workflow document priority is assigned on a scale of **1** to **9**, with **1** being the highest priority.

To change the priority of a workflow document:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Select **Priority** from the **Advanced** menu. The **Priority** window opens.



3. Use the up and down arrows to increase or decrease the priority.
4. Optionally check **Apply to Every Task in Workflow** to apply the priority change to the document in all tasks where it resides in the workflow.
5. Click **OK**. The priority is changed.

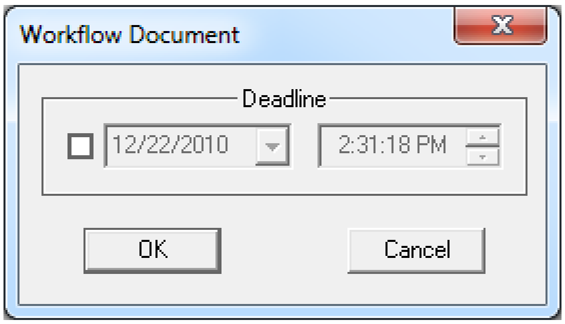
Change Document Deadline

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

If a workflow document has a deadline, the document 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 the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. From the **Advanced** menu, select **Deadline**. The **Workflow Document** window opens.



3. Check the **Deadline** option and enter the date and time of the new deadline. Press the down arrow in the date field to open a calendar.
4. Click **OK**. The deadline is changed.

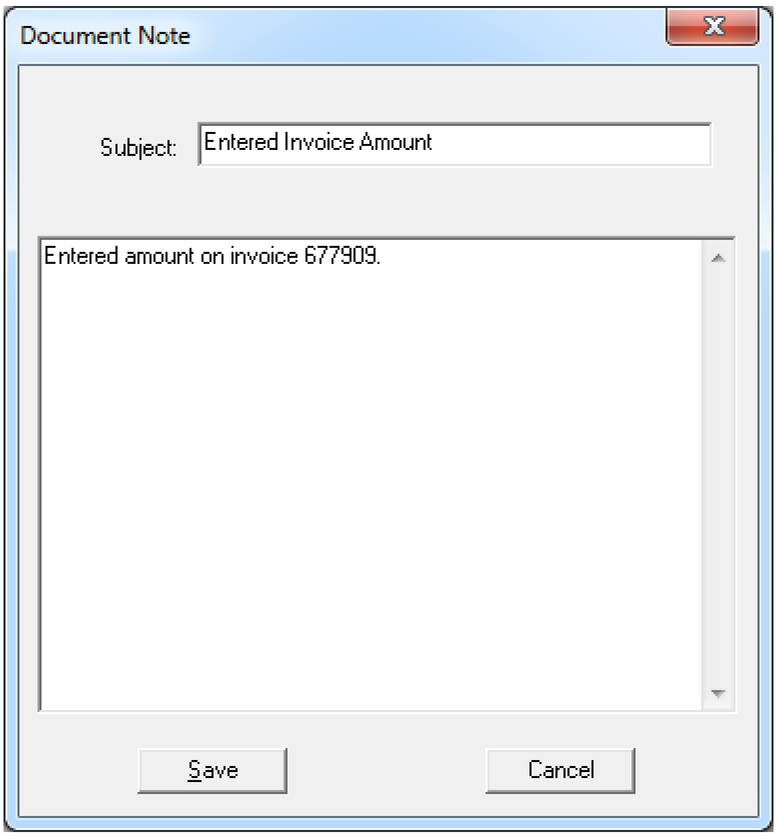
Add Workflow Annotation

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

You can add a workflow annotation to provide information to other users (e.g. describe changes made to a workflow document). Alternatively, you can use the blog bar to create and manage document notes (see Blog Bar for more information).

To add a workflow annotation:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Select **Annotate** from the **Advanced** menu, then select **New**. The **Document Note** window opens.
3. Enter the **Subject** of your note.
4. Enter the text of your note.



5. Click **Save**. The note is saved.

To view workflow annotations:

- Select **Annotate** from the **Advanced** menu, then select **View**. The **Document Note** grid opens, showing all document notes for the current workflow document.

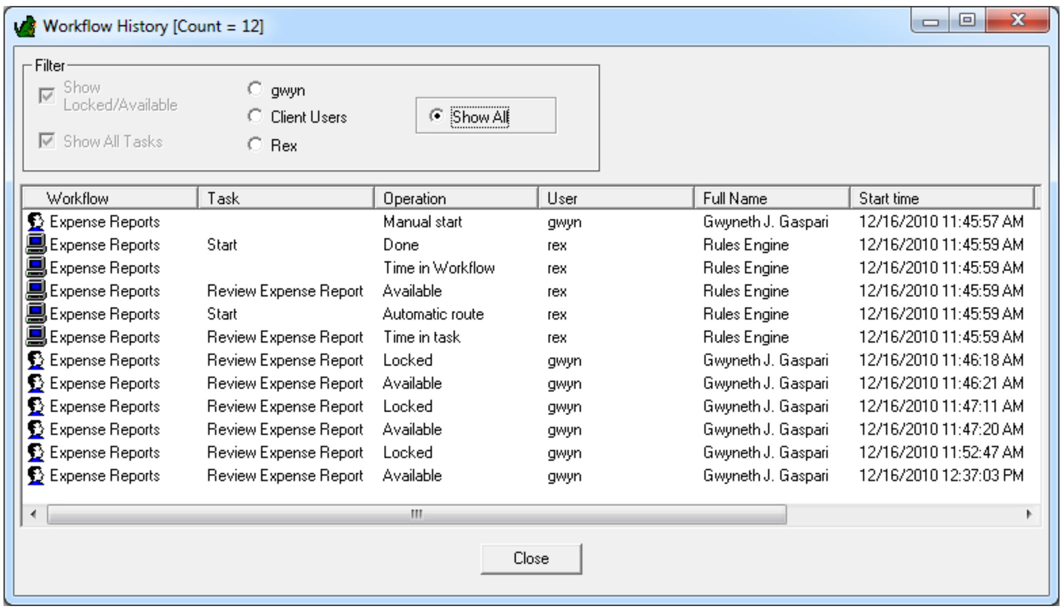
View Workflow History

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

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

To view workflow history:

1. Retrieve the document in the workflow task. See [Search for Workflow Documents] for instructions on retrieving workflow documents.
2. Select **History** from the **Details** menu. The **Workflow History** grid opens.



Workflow	Task	Operation	User	Full Name	Start time
Expense Reports		Manual start	gwyn	Gwyneth J. Gaspari	12/16/2010 11:45:57 AM
Expense Reports	Start	Done	rex	Rules Engine	12/16/2010 11:45:59 AM
Expense Reports		Time in Workflow	rex	Rules Engine	12/16/2010 11:45:59 AM
Expense Reports	Review Expense Report	Available	rex	Rules Engine	12/16/2010 11:45:59 AM
Expense Reports	Start	Automatic route	rex	Rules Engine	12/16/2010 11:45:59 AM
Expense Reports	Review Expense Report	Time in task	rex	Rules Engine	12/16/2010 11:45:59 AM
Expense Reports	Review Expense Report	Locked	gwyn	Gwyneth J. Gaspari	12/16/2010 11:46:18 AM
Expense Reports	Review Expense Report	Available	gwyn	Gwyneth J. Gaspari	12/16/2010 11:46:21 AM
Expense Reports	Review Expense Report	Locked	gwyn	Gwyneth J. Gaspari	12/16/2010 11:47:11 AM
Expense Reports	Review Expense Report	Available	gwyn	Gwyneth J. Gaspari	12/16/2010 11:47:20 AM
Expense Reports	Review Expense Report	Locked	gwyn	Gwyneth J. Gaspari	12/16/2010 11:52:47 AM
Expense Reports	Review Expense Report	Available	gwyn	Gwyneth J. Gaspari	12/16/2010 12:37:03 PM

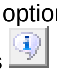
The grid lists the following information:

- **Workflow:** The workflow the event occurred in.
- **Task:** The workflow task the event occurred in.
- **User:** The user who caused the event.
- **Operation:** The type of event.
- **Time:** The date and time the event occurred.

Note: You can set the workflow history to automatically display when workflow documents are retrieved in the workflow form by selecting **Always Show History** from the workflow form **Settings** menu.

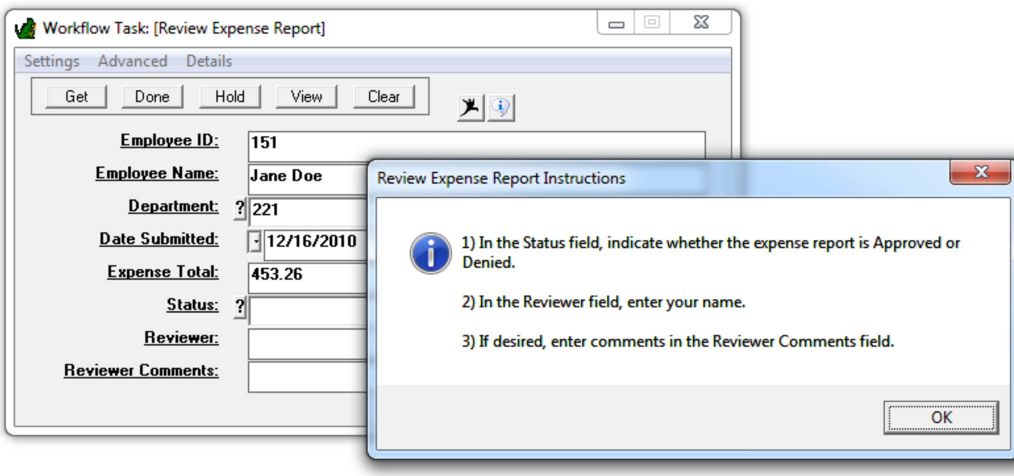
View Your Workflow Instructions

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

Your workflow administrator has the option to set instructions for your workflow task. If instructions exist on your workflow task, the **Instructions**  button displays (if the button is not there, there are no instructions on the task). These instructions provide you with information on how to process your workflow documents.

To view workflow instructions:

1. Open the workflow task.
2. Click the **Instructions**  button. The instructions display in the **Instructions** window.



3. Click **OK** to close the window.

Place Document on Hold

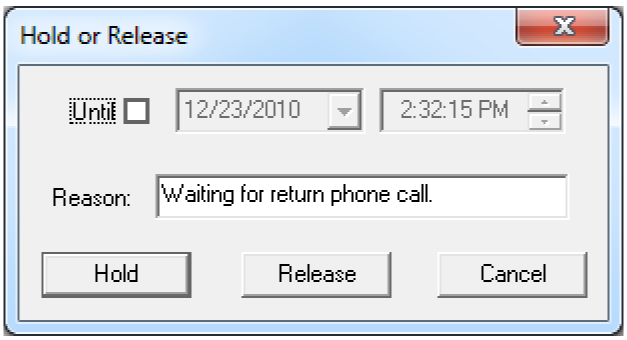
Note: These instructions refer to the optional product Feith Workflow iQ.

A workflow document can be placed on hold if you want to finish working on it later. Once a workflow document is on hold, it is reserved for you. Other users cannot retrieve or process the workflow document.

To place a document on hold:

1. Retrieve the document in the workflow task. See Search for Workflow Documents for instructions on retrieving workflow documents.
2. Press the **Hold** button in the workflow form. The **Hold or Release** dialog opens.
3. Press the **Hold** button in the **Hold or Release** dialog. The document is placed on hold.

   You can optionally enter a **Reason** when you place a document on hold.



To release a workflow hold:

1. Retrieve the workflow document that is on hold.
2. Press the **Release** button in the workflow form. The **Hold or Release** dialog opens.
3. Press the **Release** button in the **Hold or Release** dialog. The hold is released; the document is now available to other users.

Add Document to a Workflow

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

Documents can be manually added to a workflow. This may be useful if the document was indexed before the workflow was created or if an indexing mistake prevented the document from entering the workflow. You can also manually add a document to a specific task in the workflow, instead of having the document go to the workflow's start task.

Add Document to a Workflow

To add a document or folder into a workflow:

1. Open the base file cabinet and search for the document you want to add to workflow. See Search for Documents for instructions.

   Use **CTRL+click** or **SHIFT+click** to select multiple documents. All highlighted documents will be added to the workflow.
2. Right-click the selected document and select **Workflow>Add to Workflow**. The **Workflows** dialog opens.

   If the **Add to Workflow** option is disabled, the task permission for you to perform this action is not set in the Feith Control Panel.
3. Choose a workflow and click **OK**. The document is added to the selected workflow.

   The workflow list displays all workflows to which you have permission to manually add documents. Administrators can restrict this permission on a per workflow basis; this permission is set in the Workflow iQ Manager.

Add Document to a Workflow Task

To add a document or folder to a specific task in a workflow:

1. Open the base file cabinet and search for the document you want to add to workflow. See Search for Documents for instructions.

   Use **CTRL+click** or **SHIFT+click** to select multiple documents. All highlighted documents will be added to the workflow.
2. Right-click the selected document and select **Workflow>Add to Workflow Task**. The **Ad Hoc Route** dialog opens.

   If the **Add to Workflow Task** option is disabled, the task permission for you to perform this action is not set in the Feith Control Panel.
3. Choose a workflow task and click **OK**. The document is added to the selected workflow task.

   The workflow list displays all workflows to which you have permission to manually add documents. Administrators can restrict this permission on a per workflow basis; this permission is set in the Workflow iQ Manager.

The Admin File Cabinet

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

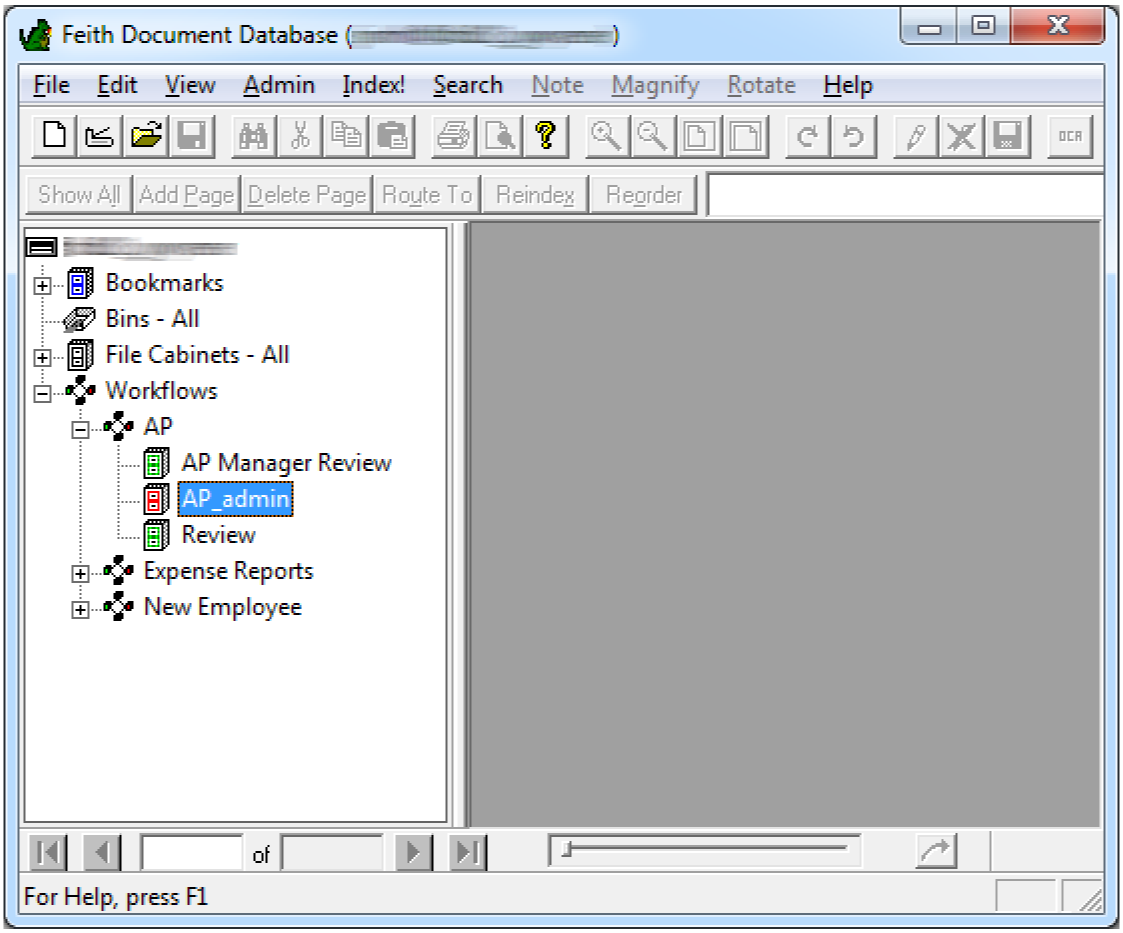
If you are in the workflow administration group, you have access to the workflow admin file cabinet. You can use the admin file cabinet to find workflow documents in your workflow.

Open 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 on the folder bar under **Workflows**.

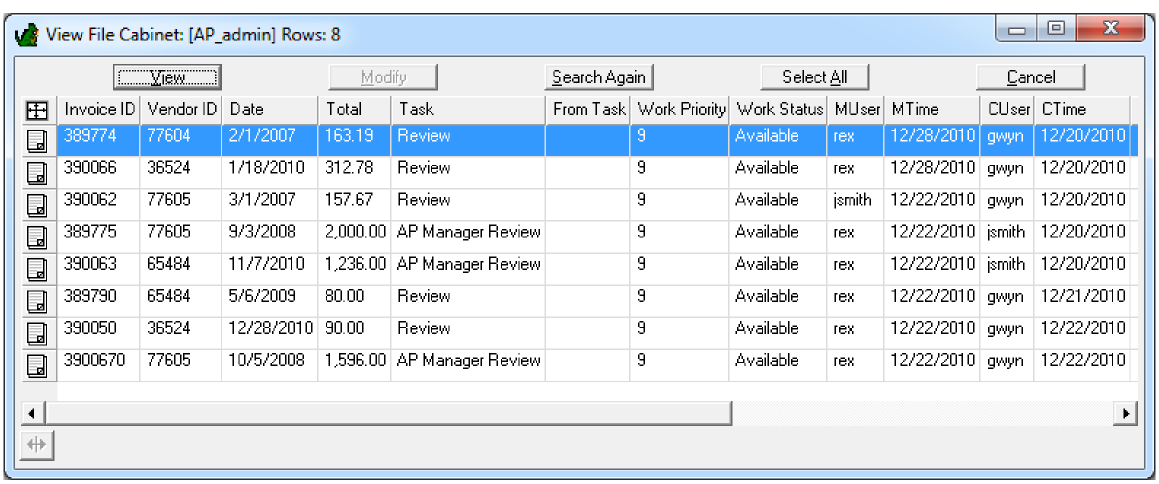
To open an admin file cabinet, double-click the admin file cabinet on the folder bar. The admin file cabinet grid opens.



What Does the Admin File Cabinet Show?

Each document 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 workflow documents.

Task	Current location of the workflow document.
Work Priority	Priority of the document. Priority is assigned on a scale of 1 to 9, with 1 being the highest priority.
Work Status	Current status of the document. **Available:** The document is available to be worked. **Locked:** The document is being worked. **Done:** The document has been processed. **Hold:** The document is on hold for a workflow user. **Ad Hoc:** The document is waiting to be ad hoc routed to another task. **Completed:** The document has completed the workflow. **Error:** REX (Feith Rules Engine) encountered an error while processing the document. **Send Back:** The document is waiting to be sent back to its previous task. **Withdrawn:** The document is waiting to be removed from the workflow.
MUser	User who last modified the document.
MTime	Time the document was last modified.
CUser	User who created the document.
CTime	Time the document 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 document is on hold, if the document is on hold. (May be blank.)



Invoice ID	Vendor ID	Date	Total	Task	From Task	Work Priority	Work Status	MUser	MTime	CUser	CTime
389774	77604	2/1/2007	163.19	Review		9	Available	rex	12/28/2010	gwyn	12/20/2010
390066	36524	1/18/2010	312.78	Review		9	Available	rex	12/28/2010	gwyn	12/20/2010
390062	77605	3/1/2007	157.67	Review		9	Available	jsmith	12/22/2010	gwyn	12/20/2010
389775	77605	9/3/2008	2,000.00	AP Manager Review		9	Available	rex	12/22/2010	jsmith	12/20/2010
390063	65484	11/7/2010	1,236.00	AP Manager Review		9	Available	rex	12/22/2010	jsmith	12/20/2010
389790	65484	5/6/2009	80.00	Review		9	Available	rex	12/22/2010	gwyn	12/21/2010
390050	36524	12/28/2010	90.00	Review		9	Available	rex	12/22/2010	gwyn	12/22/2010
3900670	77605	10/5/2008	1,596.00	AP Manager Review		9	Available	rex	12/22/2010	gwyn	12/22/2010

Manage Workflow Documents in the Admin File Cabinet

From the admin file cabinet, you can perform various tasks to manage your workflow documents.

To unlock documents that are locked or on hold:

1. Search in the admin file cabinet for the documents you want to unlock. It may help to sort by **Work Status**.
2. Select the document(s) you want to unlock. Select multiple documents using **CTRL+click** or **SHIFT+click**.
3. Right-click a selected document and choose **Workflow>Unlock Workflow Documents**. The documents are unlocked.

To withdraw documents from the workflow:

1. Open the admin file cabinet.
2. Retrieve the documents you want to ad hoc route and select them in the file cabinet grid. Multiple documents can be selected using **CTRL+click** or **SHIFT+click**.
3. Right-click on one of the selected rows and select **Workflow**>**Withdraw from Workflow**. The documents are withdrawn from the workflow.

To ad hoc route documents:

1. Open the admin file cabinet.
2. Retrieve the documents you want to ad hoc route and select them in the file cabinet grid. Multiple documents can be selected using **CTRL+click** or **SHIFT+click**.
3. Right-click on one of the selected rows and select **Workflow**>**Ad Hoc Route**. The **Ad Hoc Route** window opens, listing all tasks in the current workflow and all tasks in any workflow built on the same base file cabinet.
4. Choose the workflow task you want to route to.
5. Click **OK**. The documents are routed to the selected task.

To change the priority of the document:

1. Open the admin file cabinet.
2. Retrieve the document and select it in the file cabinet grid.
3. Right-click the selected row and select **Workflow>Priority**. The **Change Workflow Priority** dialog displays.
4. Use the up and down arrows to increase or decrease the priority.
5. Optionally check **Apply to Every Task in Workflow** to apply the priority change to the document in all tasks where it resides in the workflow.
6. Click **OK**.

To view all the workflows where the document is located:

1. Open the admin file cabinet.
2. Retrieve the document and select it in the file cabinet grid.
3. Right-click the selected row and select **Workflow>Where Is It**. The **Where Is It** dialog displays, showing information on where the document is in the workflow(s).

To view the workflow history for a document:

1. Open the admin file cabinet.
2. Retrieve the document and select it in the file cabinet grid.
3. Right-click the selected row and select **Workflow>Workflow History**. The **Workflow History** grid opens.

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 FDD 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 workflow document from that task. Integration links are configured in Workflow iQ Manager.

Integration Link Types

There are three types of integration links:

- **Forms iQ Link:** Opens a form. To process work in a task with a Forms iQ link:
    1. Retrieve a document in the workflow task. The configured Forms iQ form is opened. Note that the form might open with partially filled in values; this is dependent on the design of the integration link. Also note that the workflow task form in FDD is disabled.
    2. Fill out the form as needed and submit it. The form is submitted and the workflow document is marked as **Done**. The next available work item in the workflow task is retrieved.
- **Application Link:** Launches an application. To process work in a task with an application link:
    1. Retrieve a document in the workflow task. The document is displayed in the FDD view window and the configured application is launched.
       The **Application Link** window, which displays link information, opens in FDD. Note that you are not able to perform any actions in FDD while the launched application is open.
    2. When you are finished working in the launched application, close it and continue to process the document as needed. Click **Done** to submit the document. The next available work item in the workflow task is retrieved.
- **URL Link:** Launches your default Internet browser and opens a specific web page. To process work in a task with a URL link:
    1. Retrieve a document in the workflow task. The document is displayed in the FDD view window and the configured URL is launched in your Internet browser. Note that the workflow task form and FDD behave normally, as opposed to the other link types.
    2. Perform the necessary actions in the Internet browser and continue to process the document as needed. Click **Done** to submit the document. The next available work item in the workflow task is retrieved.

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 Feith Document Database.

Each form is based on a file cabinet; submitted forms are stored as FDD documents in the base file cabinet. Forms iQ documents can be updated from within the Feith Document Database clients (FDD or WebFDD) and can be workflowed.

Display Forms iQ Document

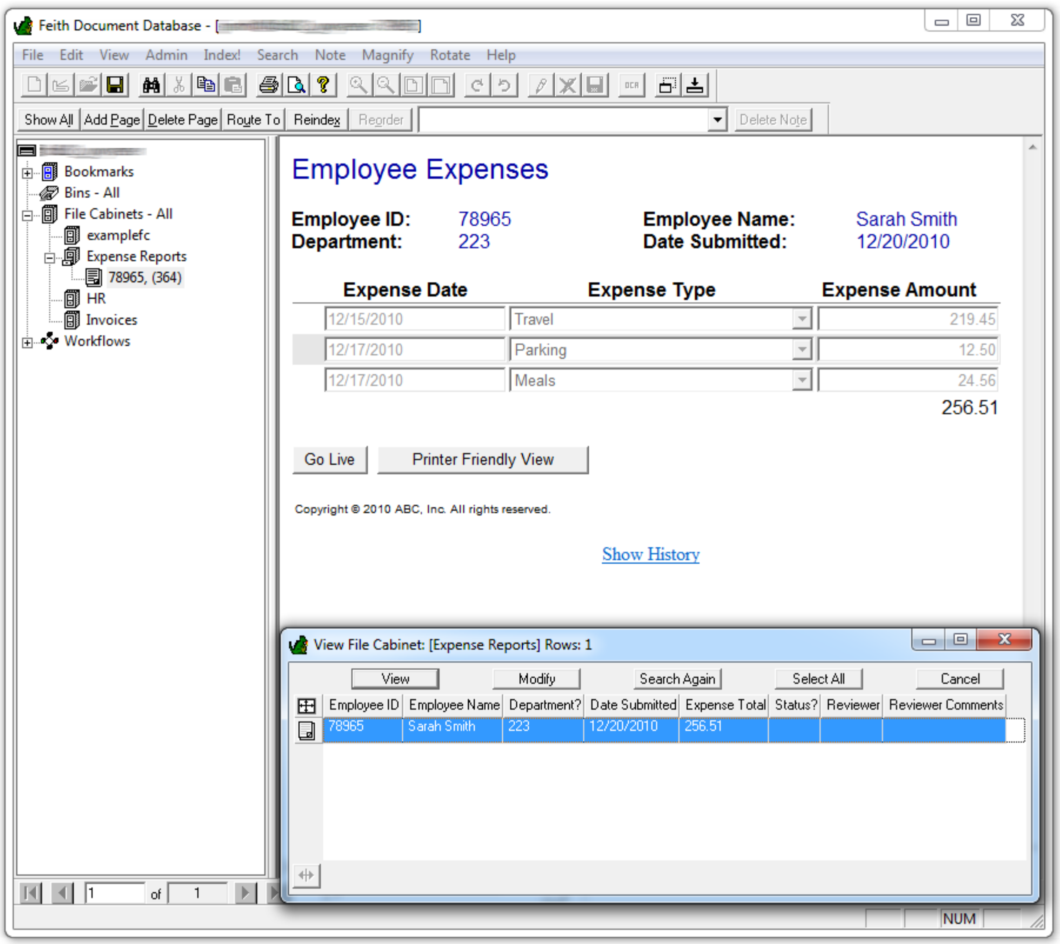
Note: These instructions refer to the optional product Feith Forms iQ.

Forms iQ documents are stored in file cabinets and can be displayed through the Feith Document Database client applications (FDD or WebFDD).

To display a Forms iQ document:

1. Search for the document. See Search for Documents for more information.
2. Select the document in the file cabinet grid and press **View**. The Forms iQ document is displayed in the FDD view window.

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



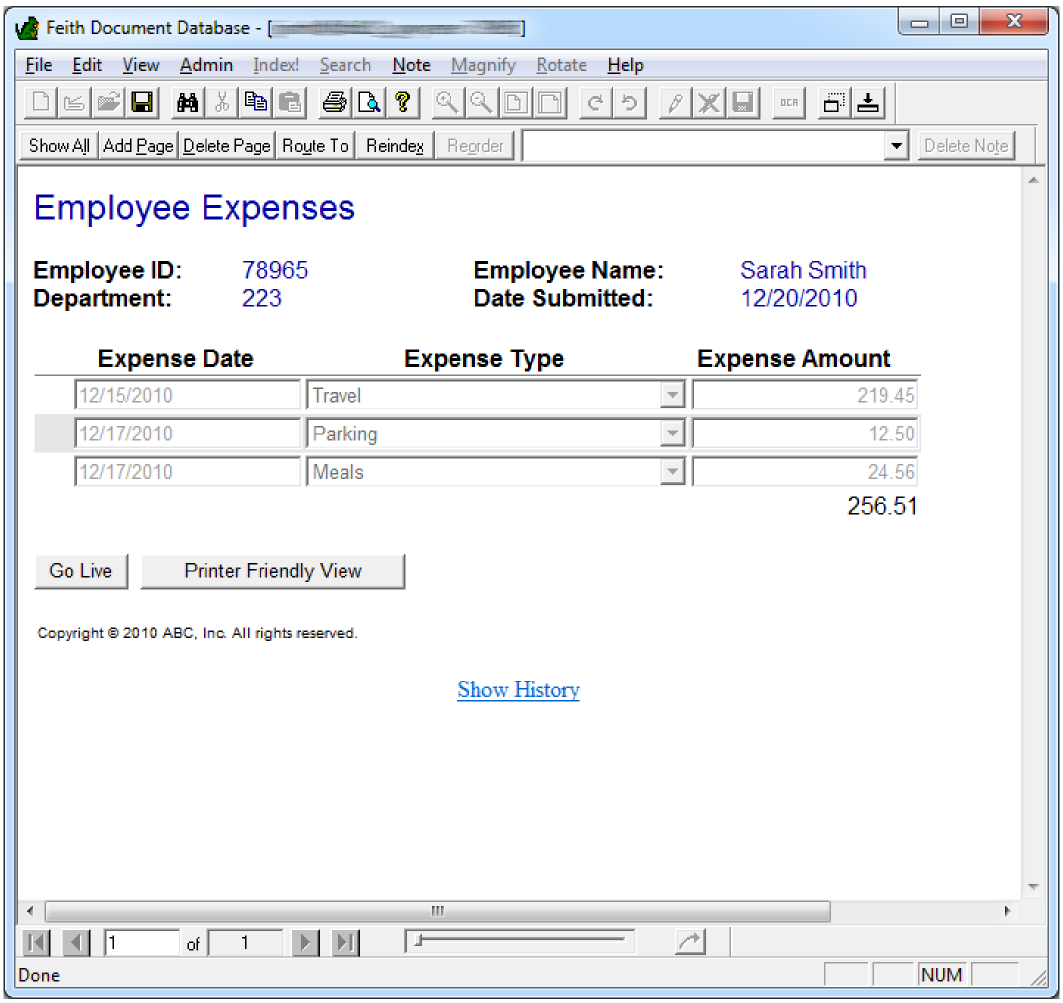
Update Forms iQ Document ("Go Live")

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

When the Forms iQ designer creates a form, they have the option 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).

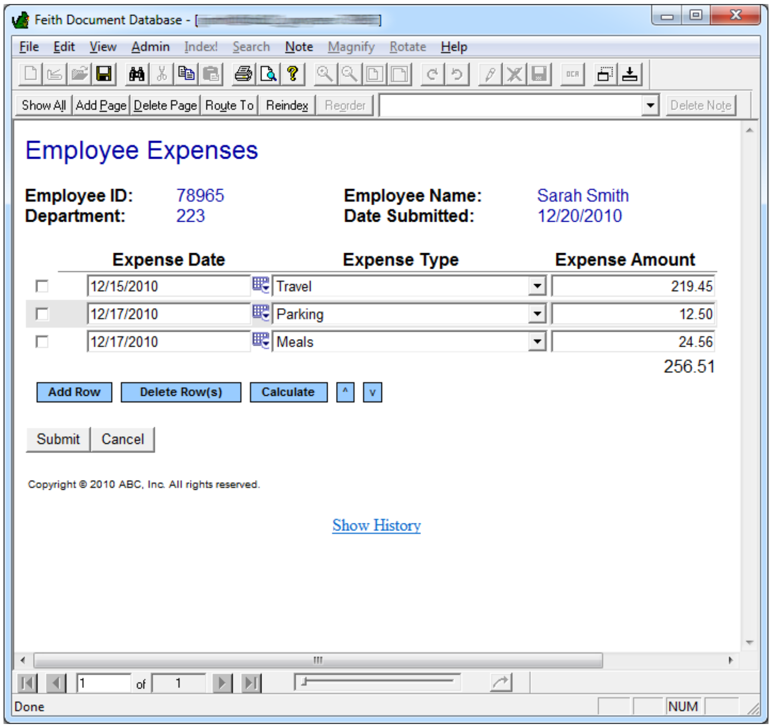
To update a Forms iQ document:

1. Search for and view the Forms iQ document.

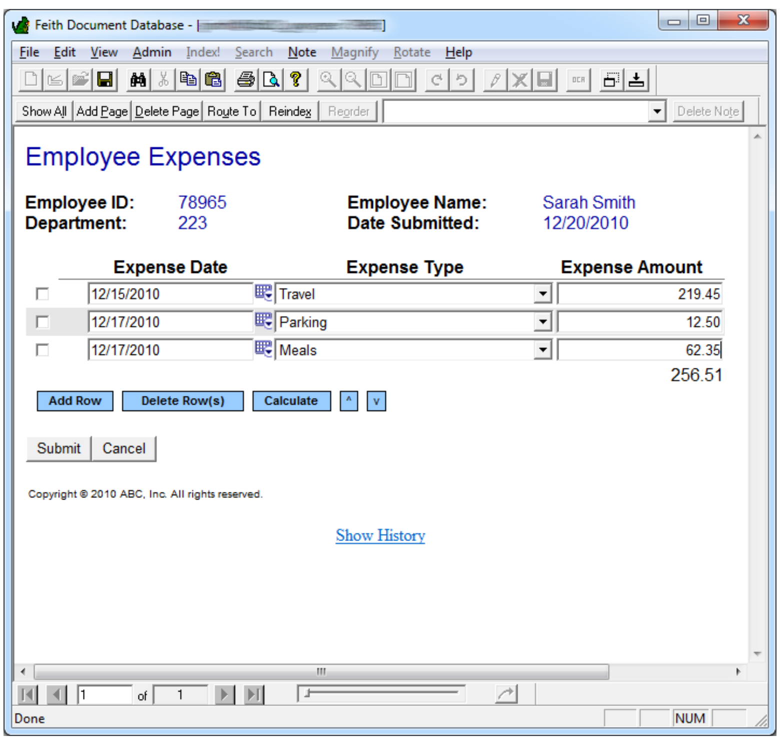


2. Click **Go Live**. (If you do not have "Go Live" permission for the form, the **Go Live** button does not appear on the form page.) The document is redisplayed in edit mode.

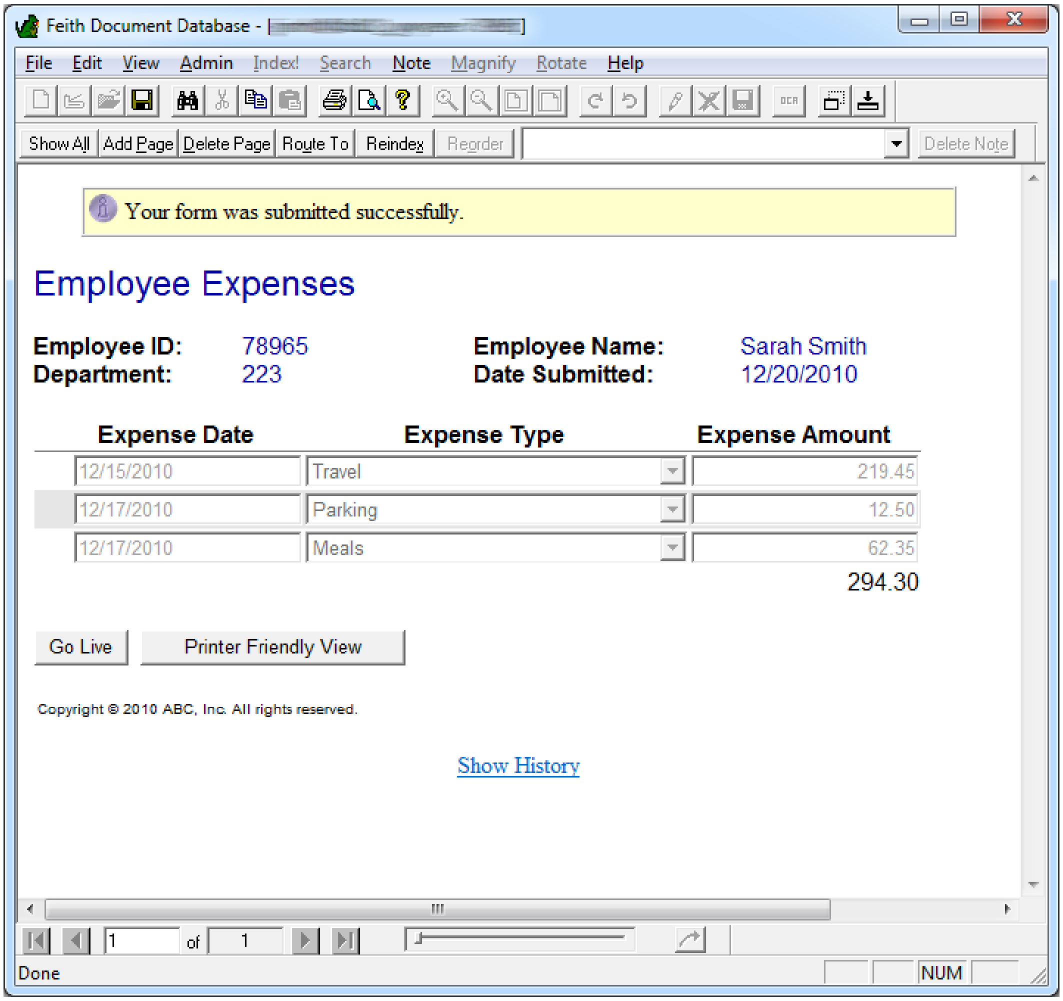
   Depending on your preferences, when you click **Go Live** the form either redisplays within FDD or displays in an external browser window. See [Forms iQ Display Preferences] for more information.



3. Edit any of the form fields and 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 a 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. (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 redisplayed 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.

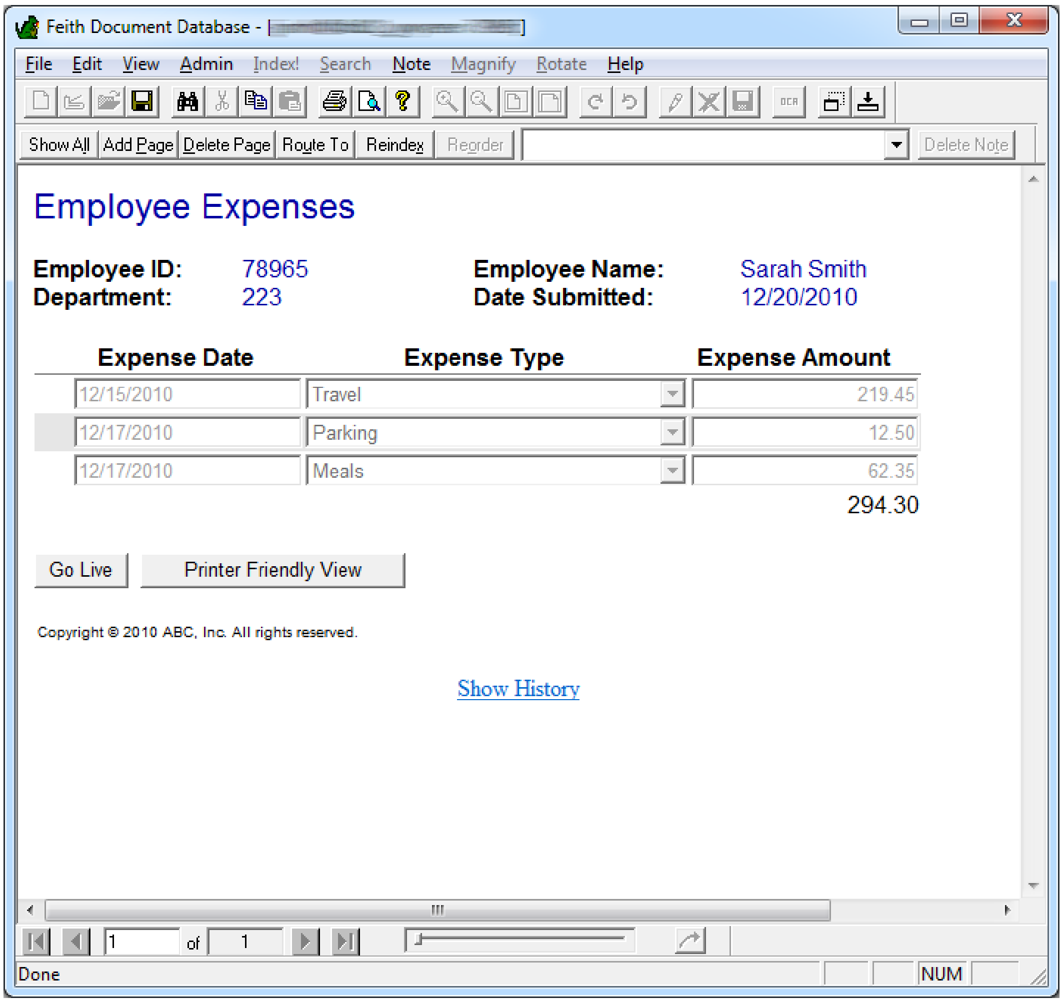
View Forms iQ Document History

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:

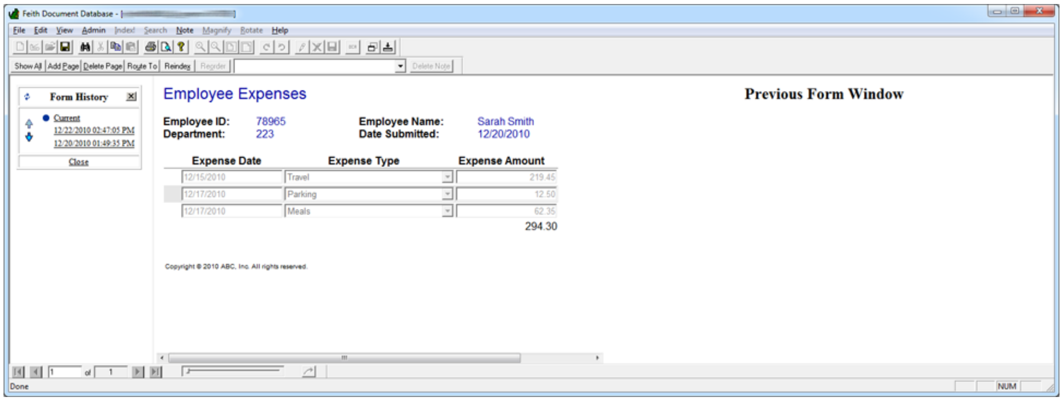
1. Search for and view the Forms iQ document.



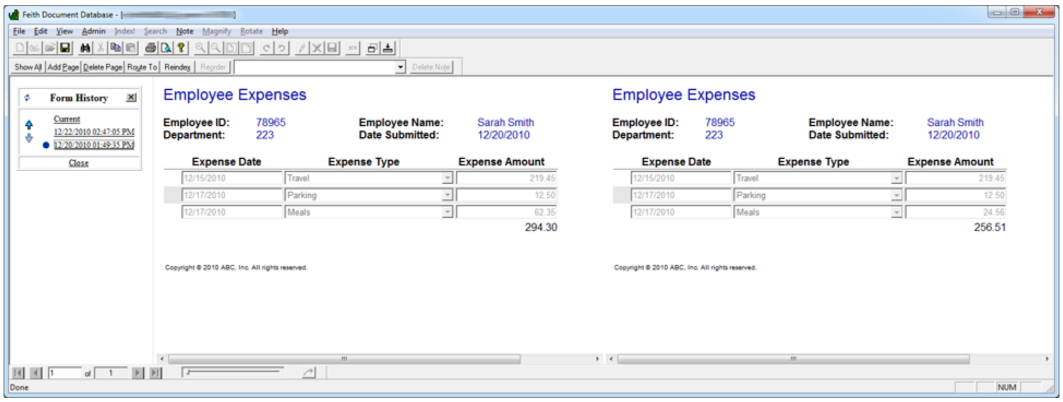
2. Click on the **Show History** link. (If you do not have "Show History" permission for the form, the **Show History** link does not appear on the form page.)

   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.

   Depending on your preferences, when you click **Show History** the form either redisplays within FDD or displays in an external browser window. See Forms iQ Display Preferences for more information.



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 redisplayed in its current state.

Forms iQ Display Preferences

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

Depending on your preferences, when you click **Go Live** or **Show History**, the form either redisplays within FDD or displays in an external browser window. See Update Forms iQ Document ("Go Live") or View Forms iQ Document History for more information on those operations.

To change your display preferences so that Forms iQ documents display within FDD when viewing history:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Auto-Display** tab.
3. Check the **Display HTML Links in FDD** option.
4. Click **OK** to save your preferences and close the dialog.

To change your display preferences so that Forms iQ documents display in an external browser window when viewing history:

1. Select **Preferences** from the **Admin** menu. The **Preferences** dialog opens.
2. Select the **Auto-Display** tab.
3. Uncheck the **Display HTML Links in FDD** option.
4. Click **OK** to save your preferences and close the dialog.

Appendix

Appendix A: Keyboard Shortcuts

Standard Shortcuts

The following standard shortcuts are respected in FDD text fields.

SHORTCUT	ACTION
Ctrl + Z	undo typing
Ctrl + A	select all
Ctrl + X	cut
Ctrl + C	copy
Ctrl + V	paste

The following standard shortcuts are respected in FDD Minipages.

SHORTCUT	ACTION
Shift + Click	select a continuous section
Ctrl + Click	select non-consecutive items
Ctrl + Alt + Click	select a column

File Menu Shortcuts

OPTION	SHORTCUT	ACTION
Open	Ctrl + O	open an .frl file in FDD
Print	Ctrl + P	print the open document

Edit Menu Shortcuts

OPTION	SHORTCUT	ACTION
Select All	Ctrl + A	select all
Copy	Ctrl + C	copy to the clipboard
Paste	Ctrl + V	paste from the clipboard
Find	Ctrl + F	search the open document for the specified word

View Menu Shortcuts

OPTION	SHORTCUT	ACTION
Refresh	F5	refresh the FDD folder bar

Help Menu Shortcuts

OPTION	SHORTCUT	ACTION
Index	F1	open the help file

File Cabinet Grid Shortcuts

SHORTCUT	ACTION
ALT+A	select all documents' rows currently displayed in the grid
ALT+B	hide the file cabinet grid from view (press ALT+B again to re-display the file cabinet grid)
ALT+N	shrink the file cabinet to better view the page (press ALT+N again to return the file cabinet grid to its original size)
F2	edit cell text when modifying (press ESC to stop editing cell and continue navigating)

View Shortcuts

SHORTCUT	ACTION
CTRL+N	view document in new image window
CTRL+S	save an .frl file of the document
ALT+P	add page to the document
ALT+O	reorder pages
ALT+D	delete current page
ALT+U	route
ALT+X	reindex

ALT+L	show all (Minipages)

Scan Shortcuts

SHORTCUT	ACTION
F6	open the **Scan** dialog.

Appendix B: Common Error Messages

The following charts list common error messages and possible solutions for each error. Check with your FDD administrator if you need assistance resolving an error.

Refer to your database vendor's documentation for more information on database errors.

Oracle

FDD Login

ERROR	TRY
1017	Check your login information.
1403	You may have entered your username in capital letters. Check that you do not have CAPS LOCK on and login again.
12154	Check the entered server name and login again.

Indexing

ERROR	TRY
1	One of the file cabinet fields may not allow duplicate values; check your indexing values.
1401	One of entered index values may be too large for the file cabinet field; check your indexing values.

MS SQL Server

FDD Login

ERROR	TRY
0	Check your login information.

Indexing

ERROR	TRY
2627	One of the file cabinet fields may not allow duplicate values; check your indexing values.
8152	One of entered index values may be too large for the file cabinet field; check your indexing values.

Appendix C: 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. FDD uses third-party text engine Autonomy IDOL for full text searching.
Elasticsearch	Offers a full text search alternative to structured file cabinets searches. FDD uses third-party text engine Elasticsearch for full text searching.
FDD COLD (Computer Output To Laser Disk)	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 Mail iQ	An e-mail active archiving solution, which gives you the power to store, monitor, retrieve, and archive your organization's e-mail.
Feith MS Office Integration	Allows users to index MS Office documents into FDD from the desktop.
Feith Quick Integrator	Links FDD 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 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 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 WebFDD	The online (intranet or the Internet) version of FDD Client. WebFDD users have online access to FDD documents (including COLD pages, scanned images, and imported objects).
Feith Workflow iQ	Allows a designer to create and manage workflows, processing FDD documents through a set of business rules.

Glossary

A

Auto-Login: An option to automatically log a user into FDD when they start the application. (Must be used in combination with the Remember Password option.)

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.

Blank Search: A search with no specified criteria. Blank searches return all documents contained in a file cabinet.

Bookmark: Either a link to a page (view bookmark) or a stored set of search criteria (search bookmark).

Boolean Logic: A system of comparison which can be used for full text searching, using logical operators such as "and," "or " and "not."

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.

Color: An FDD scan setting. There are three options for color: monochrome, grayscale or RGB. Monochrome scans black and white (1 bit either black or white). Grayscale scans shades of gray (typically 16 or 256). RGB scans three color samples per pixel, one each for red, green and blue.

Compression: To a computer, scanned pages are merely a collection of dots (pixels). For example, an 8.5" X 11" page scanned at 300 dpi consists of 8,415,000 pixels. These pixels require huge amounts of disk space to store. To conserve disk storage space, images can be compressed using special computer algorithms. By "crunching" repetitive information, compression stores images in a more efficient manner. This reduces the size of the disk file without sacrificing image quality. Compressed images are automatically decompressed at view time. When scanning into FDD, there are six compression choices: no compression, G3_1D, G3_2D, G4_2D, JPEG or PackBits. Group 3 (G3_1D, G3_2D) and Group 4 Compression (G4_2D) are industry standards for data compression. Group 4 compression makes smaller files than Group 3, but Group 4 compressed files take longer to decompress at view time than Group 3 compressed files. The compression choice is usually dictated by the system administrator and should not be changed. JPEG and PackBits are both used with color images. The main difference is that JPEG loses its color quality every time it is compressed.

Contrast: Scanners see images as black and white dots; there is no such thing as "gray." When a scanner comes across an area that is light gray, it will produce a white dot. If the area is dark gray, a black dot will be recorded. The contrast setting is the threshold for determining whether a gray area is produced as a black dot or a white dot. When scanning into FDD, there are two setting options for contrast: auto or manual. The auto setting allows the scanner to determine the contrast settings. The manual setting allows the user to determine the contrast setting. There are 101 possible settings for manual contrast, ranging from 0 to 100. Low numbers produce less contrast and darker images (images will be darker because gray areas are interpreted as black dots).

Coordinates: Often referred to as X/Y coordinates, coordinates are used to specify the horizontal and vertical location of an object.

D

Disabled: The state in which a button or menu item is light gray instead of black. This state indicates that the button or menu item cannot be selected. Also referred to as "grayed out".

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.

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

Dot for Dot: Displays an image at the monitor resolution.

DPI: Dots Per Inch. A unit of measurement of resolution for scanned and printed images. The greater the number of dots per inch, the higher the quality of the image.

Duplex: An FDD scan setting that indicates whether you are using a single-sided or a double-sided scanner.

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.

Folder Bar: Shows the FDD bins, file cabinets and workflows (if any) in a tree structure. The folder bar is located on the left-hand side of the FDD window.

FRL: An FDD URL. This link points to an FDD image; a user can double-click the .frl to open the page in FDD.

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 TREE server to support full text searches.

G

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

Graphic Note: A page note. Graphic notes can be used to draw or write on a page.

Green Bar: Displays green bar on a page. Like green bar paper, it enhances the readability of the page.

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

H

Highlight Note: A page note. Highlight notes can be used to highlight a section of a page.

I

Image Stamp: A page note. Image stamps can be used to place an image on a page.

Indexing: 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 an application, URL, or Forms iQ form.

Intensity: Intensity refers to the amount of light a scanner uses to capture an image. It has the same effect as the exposure setting on a copier. When scanning into FDD, normal intensity (the default) is sufficient for most pages. However, if parts of a page are faint, choose darker scan intensity. Dark pages (e.g., full-color pages) might benefit from a lighter intensity setting.

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.

Move Local Images: An option that moves images stored on a local disk to optical or magnetic storage. (Located on the File menu in FDD.)

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.

Paper Feed: An FDD scan setting. There are two paper feed options: ADF and flatbed. ADF should be used if the scanner has an Automatic Document Feeder (ADF). Flatbed should be used either if the scanner is not equipped with an ADF or if individual pages are too large to feed through the ADF.

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.

Personal Stamp: A page note. Use personal stamps to place an image of your full name or your initials on a page.

Position Settings: An FDD scan setting that allows you to crop a page so that only part of it is scanned. The X position defines the left and right edges of the window. The Y position defines the top and bottom edges.

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

R

Redaction Note: A page note. Redaction notes can be used to obscure ("black out" or "white out") a section of a page; redaction notes are often used to hide confidential information.

Remember Password: An option to remember the user's name and password as it is entered on the FDD Login dialog. The next time the user starts FDD (on the same workstation), the remembered name and password are automatically entered in the Login dialog.

Resolution (DPI): All scanned images are made from dots called pixels. The more dots an image has, the higher its quality. Resolution refers to how many dots per inch (dpi) the scanner will produce from the image. When scanning into FDD, the most common resolution settings are 200 and 300 dpi. 200 dpi produces images that require less disk space to store, but are of lower quality. 300 dpi is recommended if the image will be submitted to an OCR (Optical Character Recognition) program or bar code reader.

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

S

Scan Two Sides: An FDD scan setting that allows you to scan double-sided documents with an automatic feeder and get all the pages in the correct order. (This is accomplished by scanning one side of each page in a batch, then turning over the batch and scanning the other side. FDD automatically reorders the pages so they are stored in the correct sequence after the entire batch has been scanned.)

Section: A document can be divided into sections, for easier navigation and for purposes of printing, e-mailing, and exporting a portion of a document.

Stamp: A page note. See Image Stamp, Personal Stamp, or Text Stamp.

Sticky Note: A graphic note, highlight note, or text note that can be opened by clicking on a sticky note style icon. The sticky note icon can be positioned anywhere on the page.

T

Text Note: A page note. Text notes can be used to add comments to a page. Text notes display in a separate window.

Text Stamp: A page note. Text stamps can be used to create text notes from a user-defined template.

Thresholds: An FDD scan setting that sets a required minimum size for scanned images. If a threshold is set, scanned images smaller than the designated size are not stored in FDD. This setting is dependent on compression type and is only available if either G3_1D, G3_2D or G4_2D compression for monochrome pages has been selected.

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.

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