



2004 Edge

Business Management Solution

user guide



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edge 2004 *user guide*

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Manual v. 12.18.03

2004
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introduction



Welcome

Welcome to Edge 2004™, a business management solution developed and manufactured by Integrated Digital Systems/ScanAmerica, Inc (IDSS). Edge 2004™ is a Microsoft Windows based application that manages the batch capture, classification, storage and retrieval of paper and digital documents, and over 50 other formats including email and attachments.

Edge2004 provides built in interfaces to popular workflow and web based collaboration products such as Microsoft's Sharepoint and our J2EE EdgeVault product. It is critical for corporations to meet the document management requirements of the Sarbanes-Oxley Act which impose penalties as severe as imprisonment for corporate executives if they fail to properly manage corporate communications and documents, as well as the requirements of HIPAA for Healthcare Providers. HIPAA's aim is to provide simplification and standardization to the health care industry, as well as protecting personal health information. Edge 2004™ is compliant with all of the standards and requirements for both laws.

New Features in Edge 2004™

- New Drag and Drop feature within Edge
- New active Search and Select interface
- New File and Document Selection feature
- Administration Module with features to create users, groups, set group permissions and implement Access Logging.
- Version Control
- Retrieve from DocuShare feature
- Workflow interface upgrade
- Email and attachment file storage capability
- Image Thumbnails (TIF images only)
- Email File routing
- Bates Stamp feature
- New Archive feature
- File Ownership
- New EdgeVault, iManage, and SharePoint interface
- Batch Processing
- Enhanced Export to Media feature with Viewer
- New DocuShare interface
- Secure login
- Windows Authentication Login using Active Directory
- Microsoft Office 2003 compliant
- Microsoft SQL Server Create Tables Utility.

Edge 2004™ features a simple to use interface that allows the management of files and records with easy to understand, yet complex enough to meet the most stringent and growing demands for records availability and accountability. Edge 2004™ was designed to be flexible, open, and easily customizable to handle the demands of:

- Law Firms
- Courts
- Health Departments
- Banks
- Transportation Companies
- Real Estate Companies

- Clubs, Associations, and Organizations
- Insurance Companies and Agents
- Colleges and Universities
- School Systems
- Small Municipalities
- Law Enforcement Agencies
- State, Local, and Federal Government Agencies
- Personnel Departments
- CRM

Edge 2004™ runs on Windows2000 Server/Professional and Windows XP Home/Professional platforms. Edge 2004™ can be packaged as a turnkey solution by IDSS or one of its authorized resellers. Unlike most document management product vendors, IDSS offers customized versions of Edge 2004™ to meet customers' specific application and needs.

Edge 2004™ ships with a Microsoft Access Database to keep it affordable and easy to manage, but also integrates with Microsoft SQL Server or any ODBC compliant database product. Also provided is compatibility with third party applications such as Seagate Crystal Reports for end-user developed reports, and the ability to use the Microsoft Access Upsize Wizard to migrate information to SQL-based client-server products.

About This Guide

This user guide provides detailed information about tools and commands that you will encounter while working with the program. It is designed to be a reference tool in your everyday work with Edge 2004™.

This guide is set up to follow the same order that you will use with the software itself – from installation to exporting to a workflow.

The Introduction covers everything you need to know about compatibility, installation, and registration options.

Chapter One provides information on all available options presented to an administrator, such as password protection, creating and modifying user accounts.

Chapter Two is a step by step tutorial on the basic operations of Edge 2004™ and its most commonly used features.

Chapter Three details what each menu command does so you will feel comfortable with the interface as soon as you start to work with it.

Chapter Four gets you up and running with your content, explaining the ins and outs of the program, covering all of the features and options that have not yet been explained

Chapter Five gives you information about Support and Resources, as well as information on Customized Versions.

This guide is being continually updated for ease of use. You will find the version number (which is also the date of publication) on page ii in the Table of Contents. The latest version is always available online at: <http://www.edgedepot.com>.

Hardware & Software Compatibility

Edge 2004™ was designed to be used in the average office environment as a stand-alone product or enterprise solution. In taking into consideration the wide variations of equipment in today's office, IDSS has designed a product to work with a lower hardware threshold. Edge 2004™ minimum hardware requirements are as follows and will change with customization and as new modules are added:

PC w/ 600 MHz w/ 128 MB RAM

500 MB free space

24X CD-ROM or DVD drive

3.5 Floppy Drive

Tape Backup Unit (4GB)

17" Monitor

Super VGA (1024 x 768) or higher resolution video adapter and monitor.

8 MB Video Controller

100 BaseT NIC

TWAIN compliant scanner

Operating Systems:

Windows 2000 Professional & Server (SP 4), Windows XP Home Edition & Professional (SP 1)

Scanners:

Fujitsu

Kodak

Acer

VIDAR

Ricoh

Computers:

| | |
|-----------------|---|
| Acer Open | Entire Line of Computers, Servers, Raid and scanning products |
| Hewlett Packard | Systems |
| Compaq | Systems |
| Gateway | Systems |
| DELL | Systems |

Storage:

| | |
|-----------------|------------------|
| Western Digital | Storage Products |
| Seagate | Storage Products |
| Quantum | Storage Products |
| Hewlett Packard | Storage Products |
| Iomega | Storage Products |
| SONY | Storage Products |

While we are confident that Edge 2004™ will work with almost any open architecture based systems and Microsoft compliant products, there will always be exceptions. For more information about Edge™ features, EdgeVault, iManage, SharePoint, Xerox DocuShare, or Microsoft Products and how they can meet your needs, visit our website at www.idss.net or www.edgedepot.com or contact:

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Your local Xerox Products Office or Agent.

Registration

Edge 2004™ was designed to make the registration process as easy as possible. If you were not already given a product key, contact Integrated Digital Systems at (800) 283-0999. You will have a 30 day trial access; starting with the day it is installed, to use the program without a key. Registration screen is located under **File > Help > About Edge 2004**.

About IDSS Products & Services

Integrated Digital Systems features a host of applications and services for multipurpose platforms. On top of all the programs and services provided, IDSS also customizes software packages to suit organizations individual needs. To find out more go to www.edgedepot.com today.

Edge 2004™ Package Contents

Depending on which copy of Edge 2004™ was obtained, the package will contain the Edge 2004™ software, a user manual and help files. If it was part of a CD ROM presentation, it will contain trials, full and light versions of other useful products that integrate well with Edge 2004™. If it was downloaded from the internet, only the program will be installed.

Installing Edge 2004™

You **must** have administrative privileges on the computer onto which you are installing this product. "Power Users" may install this product as well. Ask your administrator for more information. (See Installation Guide for further details)

To start the installation process, locate the appropriate icon or link (depending on if you are using an Edge 2004™ CD ROM or internet download).

If there is an Edge2004.zip file, open it. (If you are online, you should first download and save it locally on your system, then open it)



If your file was zipped, open it to reveal the **Setup.exe** file, and then open it.

If your file was not zipped, then the icon or link you click to start installation is the **Setup.exe** file.

Click OK to start the installation, or choose cancel if you need to close other programs before continuing. It is always a good idea to close other programs before installing new software so there is no interference.

Now you need to choose where you need to save Edge 2004™ on your system. Make sure that you have enough free disk space on the drive that you choose before continuing. After you decide, click the icon to proceed.

See Installation Guide for details.

Starting Edge 2004™

Now that Edge 2004™ is installed, it is time to start the application. On the Start menu in Windows, choose, **Programs > Edge 2004**.

2004
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1
administration



Welcome Screen

Upon starting Edge 2004™, you will be greeted with the following screen:

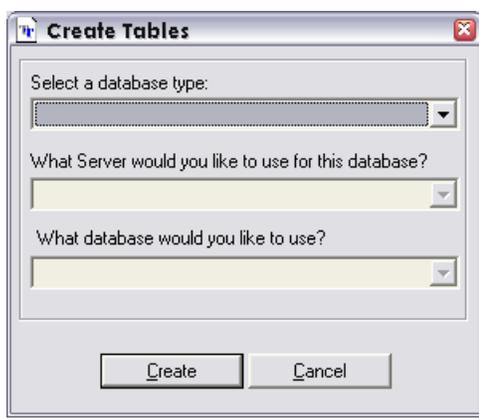


Setting Up a Data Source (See Chapter 4 for a more detailed description)

Create SQL Tables

If after setup it is decided that the default access database (Edge 2004) is not going to be used and a SQL one is preferred, you can find the Create SQL Tables option under the directory where Edge 2004™ was installed. It is also in the Start menu under Edge 2004™.

Select the database type, the server it resides on, and which database is to be used. Click Create to create the database tables.



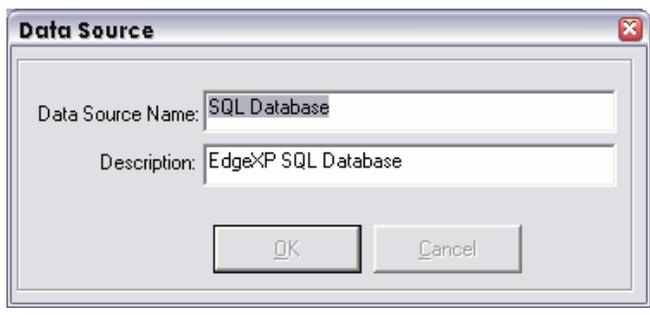
This is the screen that the admin will be prompted with after selecting what server is to be used from the dropdown list. This is where the type of authentication for the database is going to be set. Click Connect once the type of authentication is chosen.



DSN Selector

The DSN Selector is located in the directory where Edge 2004™ was installed. It is also in the Start menu under Edge 2004™.

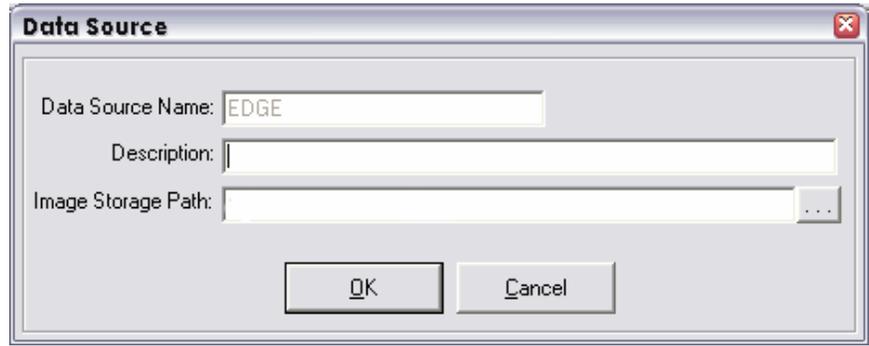
This is where the Data Source Name and the Data Source description are entered.



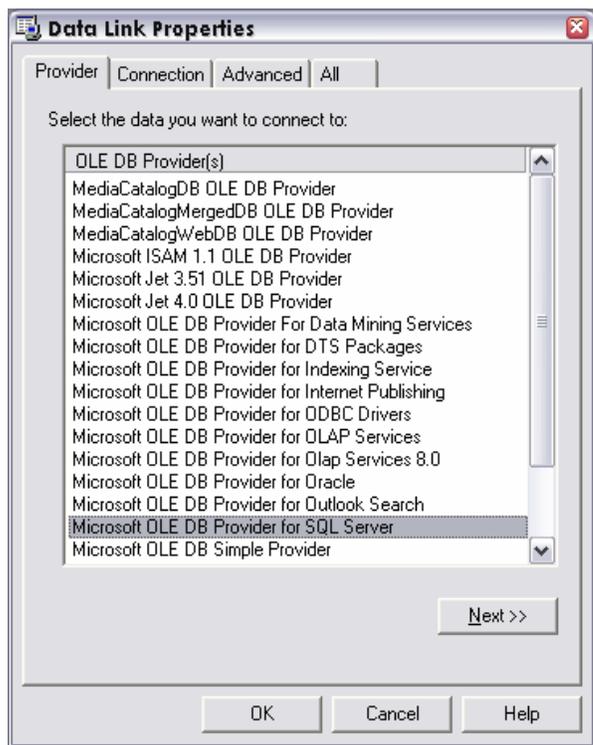
Here is where the Data Source can be configured, removed, or a new Data Source added.



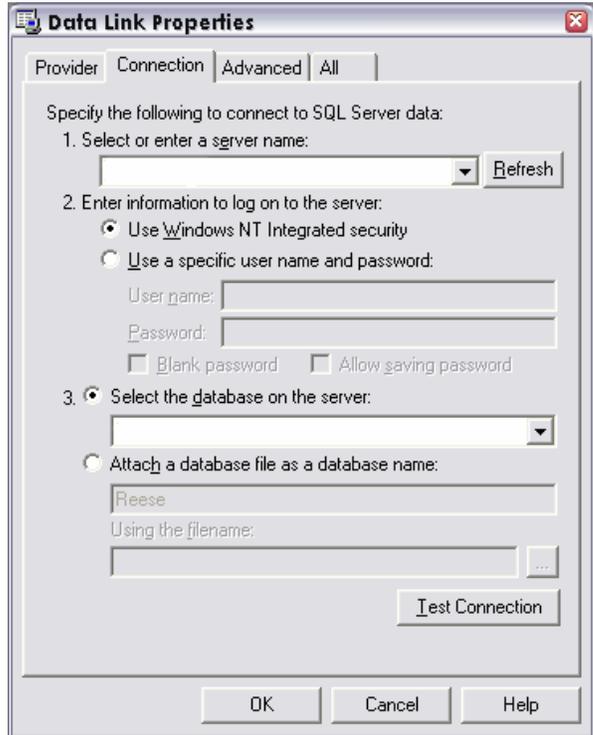
To Configure the Data Source click Configure and the screen below will pop up.



To add a new Data Source click Add. The following screen will appear.



On the Provider tab, this is where you will select the data you want to connect to. Once the provider is chosen click Next to continue. Below is the next screen you will see. Here is where the Server Name, Log On information, and the Database are chosen.



First Select or Enter the Server Name that is going to be used. Next Enter information on how to log on to the server, either through Windows NT security or with a username and password. (**Note:** If the 'Use a specific username and password' is chosen, 'Allow saving a password' MUST be checked. The default username is 'edgeuser' and the default password is 'demo'.) Next you will select what database you would like to use from the server. Always click the Test Connection button to make sure the database can be connected to successfully.

Logging in for the First Time

Now you need to log in. The default username is *edgeuser* and the default password is *demo* for the Edge 2004 database that ships with Edge 2004™.



Administrative Settings

If logged in as an administrator this is the initial screen they would see after logging in. If no Field Manager are set the first screen would be the Field Manager screen. This is where all the administrative settings can be accessed. At the bottom of the Administration Settings screen there is an option to "Show this screen at startup". If this is checked, this screen will be the first screen every time the administrator logs in. One of the first things the Admin has to do is to set up the Field Manager for the folders and documents. Next the Admin should do is to set all of the settings available below.

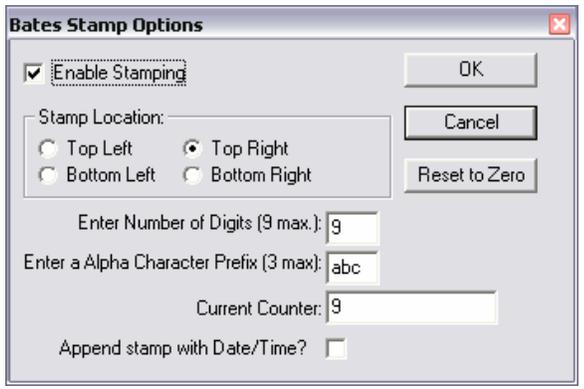


Archive Path

Allows the administrator to set the path to where the files will be archived based on the date assigned to the file.

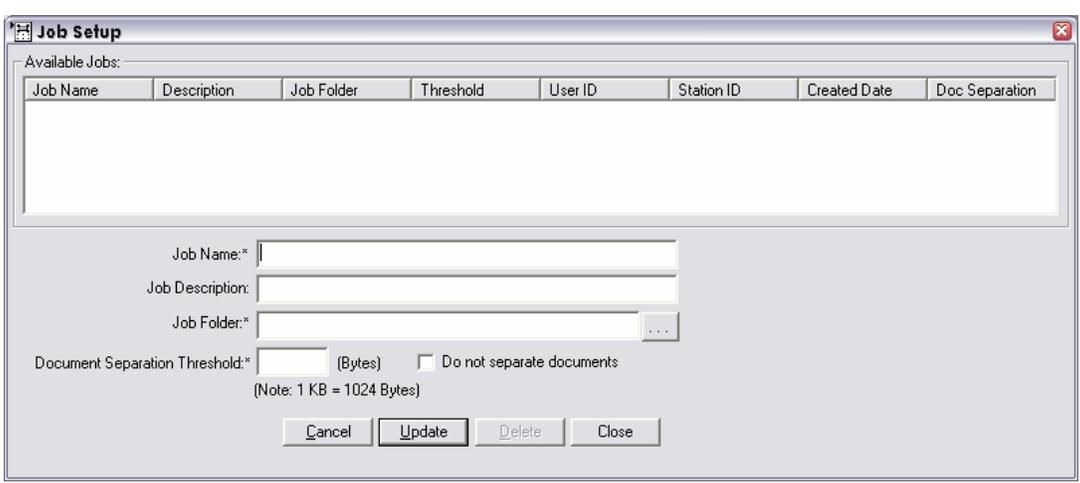
Bates Stamp Settings

Provides the ability to uniquely number and timestamp documents in one of the documents four corners as they are processed. Here is where you would set the location of where you want the stamp to be placed on the document.



Job Setup

Provides the administrator with the ability to setup Batch Processing jobs



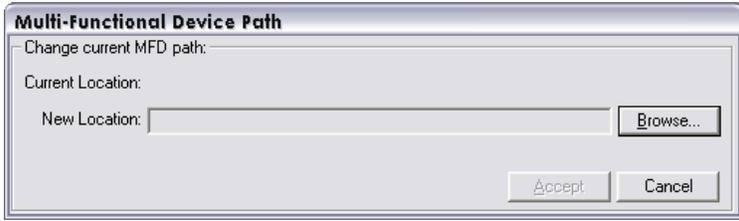
To Create a Batch Processing job:

(Note: there must be at least one job setup to begin using Batch Processing)

Click Add and then fill in the required information at the bottom portion of the screen. If the documents need to be separated when scanned in, you can set the Document Separation Threshold. Depending on how ever many bytes you set the threshold, what this feature does is while scanning or importing documents if a document falls below the set threshold, it will delete that document and begin creating a new document with the following files. Click Update to add the job to the list of Available Jobs.

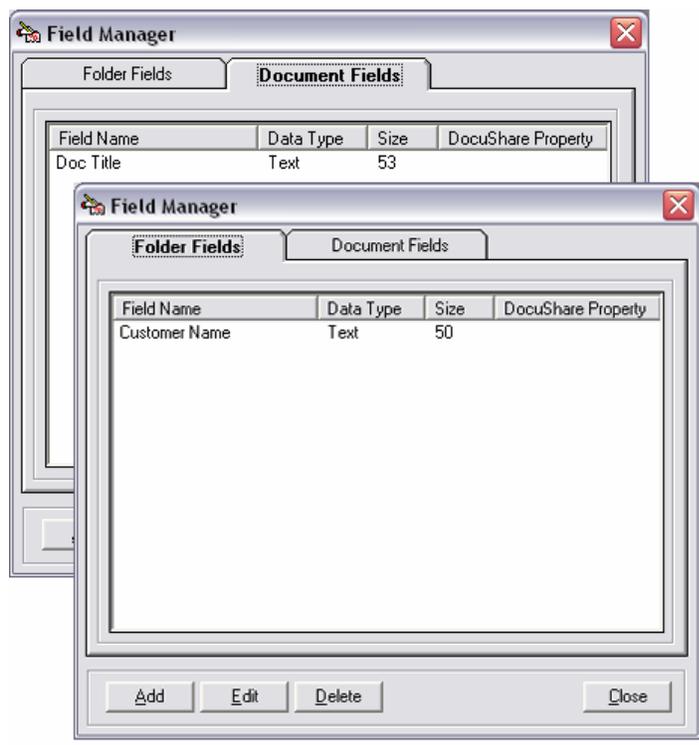
MFD Shared Path

Allows the administrator to point to the MFD Shared Directory. A user can add MFD images to a document by selecting "From MFD..." from the Document Source dropdown.



Field Manager

The Administrator may change the Folder and Document fields to suit the needs of the project.

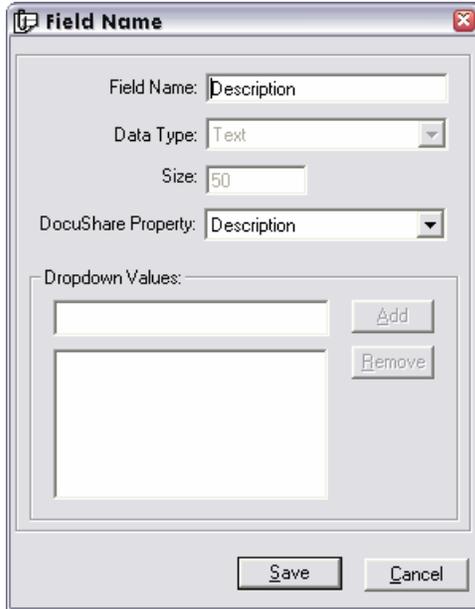


The Fields Designer allows the administrator to design new field labels for Folders and Documents. The field label cannot be greater than 18 characters and there cannot be more than 14 fields. Once you create a field label and there is information in the database, you cannot change its Data Type and the Size can only be increased but you can change the name of the field. The fields order can also be rearranged by dragging and dropping the fields in the desired order.

Adding a New Field to a Folder/Document

This feature allows the administrator to customize the Folder and Document field labels.

The administrator has the option to fill the fields with Dropdown Values so that users can just select one of those values and reduce user errors when entering field values.



1. The Fields Designer can be accessed either on the Main Menu under **Options > Administration** or by right clicking at anytime on the screen.
2. Once the Administration Settings screen will be displayed choose **Field Manager** and the Fields Designer will pop-up. The Administration Settings screen is also the first thing that the admin sees when they log in.
3. Click **Add** on the Fields Designer and the “Add New Field Name” screen is displayed.
4. Enter a new field name
5. Select the **Data Type** from the dropdown list.
6. Enter the **Size** if needed.
7. If desired to have the new field be a dropdown list, enter the desired dropdown values in the space provided and click the **Add** button to add values to the dropdown list.
8. Click **Save** to add the new field.

The maximum number of fields that can be added is 14.

The maximum size for the *Text Date Type* is 254.

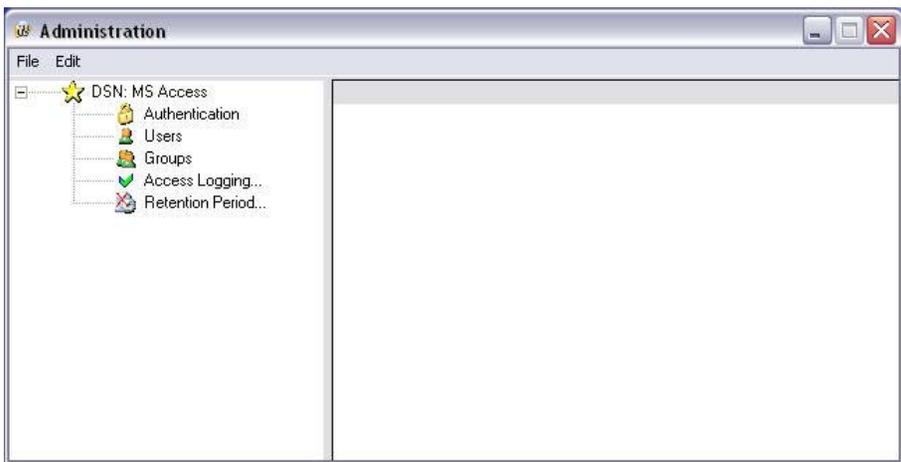
Once a field is created, only the **Field Name** and **Dropdown Values** can be edited.

Administration Module

The Administration Module lists the existing users and groups with their corresponding information; it also lists the Access Logging information when it is enabled

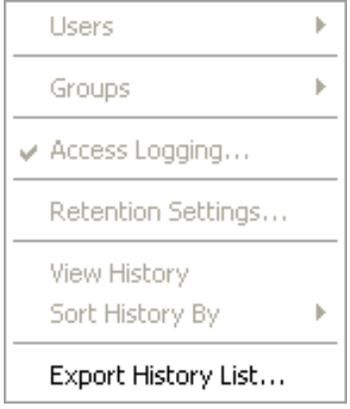
The Administration Module allows the administrator to:

- Add, delete and update information for all user accounts
- Add, delete, update and set permissions for all the groups created
- Provide a unique feature through which the administrator can export the user or group list or Access Logging information.
- Set Event or Time-Driven Retention Periods
- Export History of each category
- Ability to use Windows Authentication Login for Edge 2004™



Administration Popup Menu

Right click in the Administration screen to view the popup menu below.



Clicking on **Export History List...** allows the user to export each categories list into a spreadsheet format and saves it in a Reports folder. The folder titled Reports can be found in Edge 2004 directory.

Adding/Deleting User Accounts



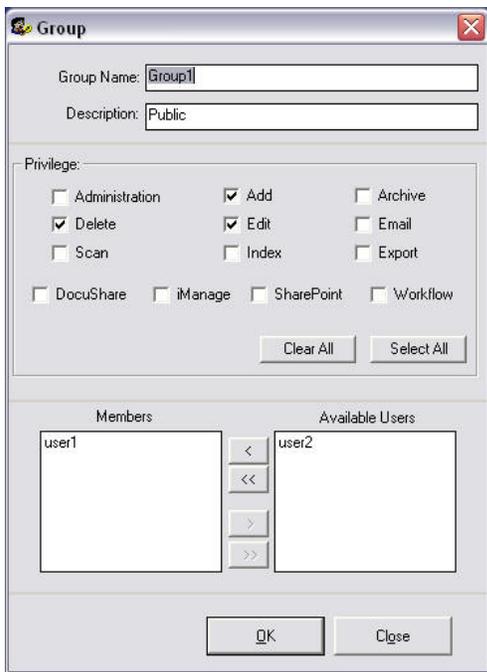
To add a user account:

1. Once the **Administration Module** screen is displayed select **Users** and the user lists will be generated on the right hand side.
2. A New User Account can be created by selecting **New Users** option under **File > User** or by right clicking at anytime on the screen and selecting New User under Users
3. Once the screen pops-up, the administrator enters the required fields and assigns the user to a group. (*Note: The **User Account** screen allows an administrator to disable the account*)

To delete a User Account:

1. Once the Administration Module screen is displayed select Users and the user lists will be generated on the right hand side.
2. Right click on selected user name that has to be deleted.
3. Click **Users > Delete User** button to delete the user.

Adding/Deleting Group Accounts



Add a Group Account

1. Once the **Administration Module** screen is displayed select **Groups** and the group lists will be generated on the right hand side.
2. A New Group can be created by selecting **New Group** option under **File > Group** or by right clicking at anytime on the screen and selecting **New Group** under **Groups**.
3. Once the screen pops-up the administrator assigns required privileges and assigns members for this group. (*Note: Once the **Administrator** option is checked under privileges, all privileges are assigned to that group by default*)

To delete a Group Account:

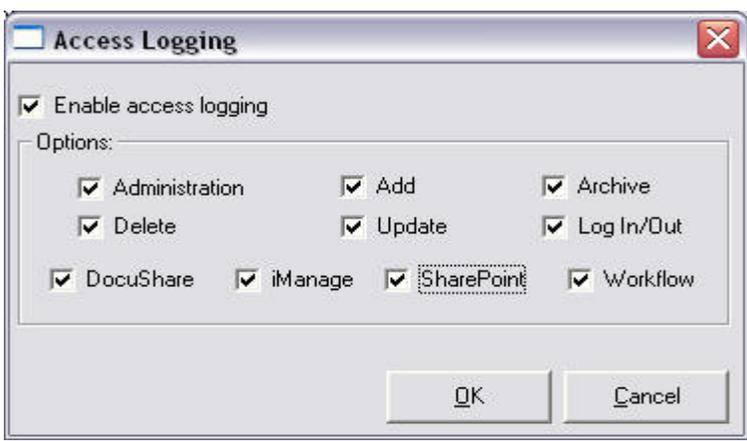
- 1. Once the Administration Module screen is displayed select Groups and the Group lists will be generated on the right hand side.
- 2. Right click on selected group name that has to be deleted.
- 3. Click **Users > Delete Group** button to delete the group.

Access Logging Options

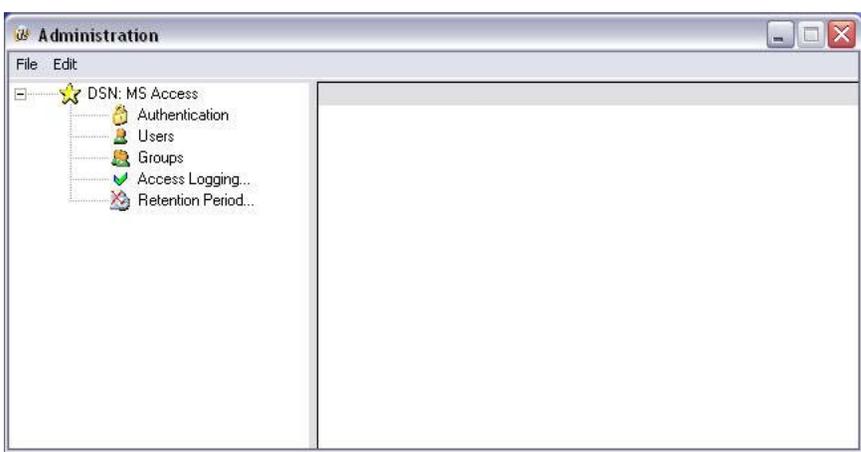
Access Logging Options provides the Administrator to track the user by logging in the events performed by the user during his Login interval to the Edge 2004™.

To use Access Logging Options, the same has to be enabled. Access Logging Options can be enabled by right click on the **Access Logging > Access Logging Options**.

Access Logging Options screen provides the events (Add, Archive etc) which the administrator wants the Logging information for each user.

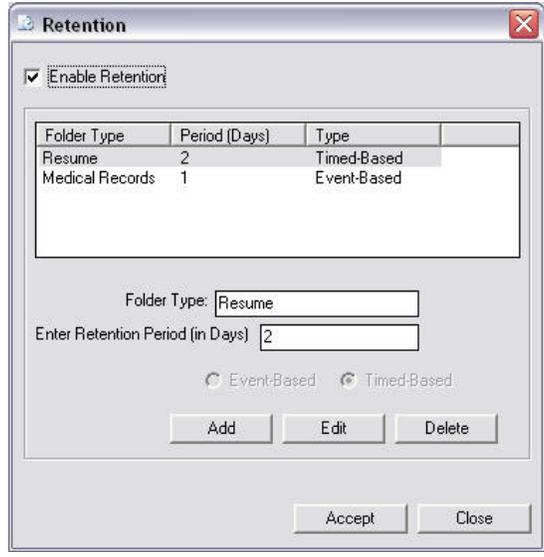


To view Access Logging Options right click on the **Access Logging > View History**



Retention Period

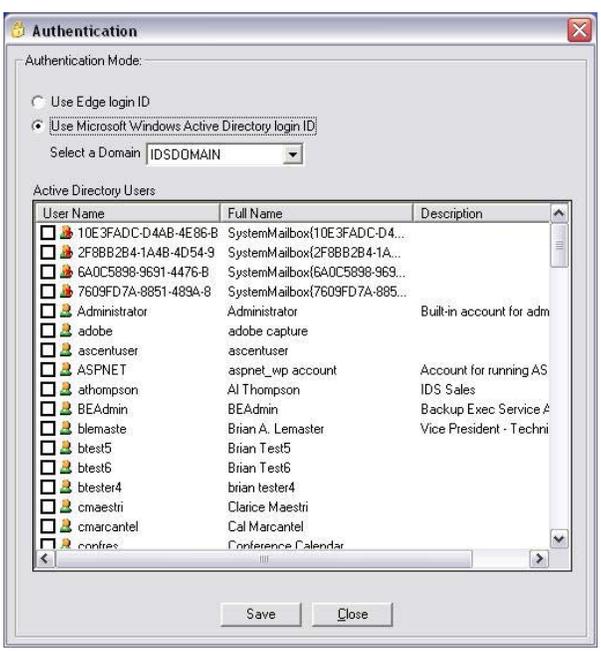
The Retention Period section provides the ability to enable the Retention Management feature. The Retention Management feature allows the Retention Schedule to be associated with 2 types of Retention - Time Based, Event Based. To implement Retention Management it is required that the user select a look up value for * Required Field - Folder Type. For each of these Look up values, the administrator can set the Retention Schedule based on Time Based or Event Based retention.



Windows Authentication Login using Active Directory

One of the new features of the Edge 2004™ is the ability to use Windows Authentication Login for Edge 2004™. This feature can be enabled from the Administration Module of the Edge 2004™ from the right click menu of the Authentication tab and subsequently clicking on the Authentication Settings.

The Authentication Settings window is shown below. It provides two authentication modes to choose from - Use Edge login ID, Use Microsoft Windows Active Directory login ID. When the former is selected it uses the normal Edge 2004™ user login as the authentication mode. When the latter is selected it first provides a list of domains to choose from. When the domain is chosen, the users existing in the domain is populated with check boxes as shown below. Required users are checked against to provide for Windows Authentication Login.



Note: The users who are imported from the respective domains to implement Windows Authentication Login are not active/enabled unless they are assigned to one of Groups in Edge 2004™ through Administration Module.

The below Login screen appears for the Edge 2004™ when Windows Authentication Login is activated.



2004
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2
tutorial



This tutorial is a step by step guide that will assist you in using Edge 2004™. You can use your own files while going through the processes described below, or you can use the demonstration files packaged with Edge 2004™. They are located in a **Samples** folder where you installed Edge 2004™.

Product Features Located in the Graphical User Interface

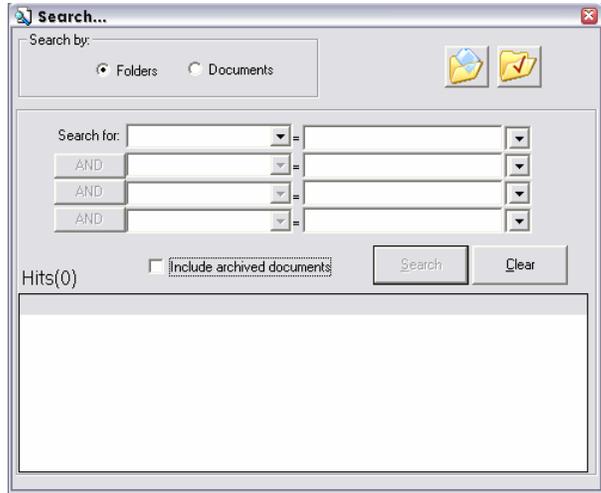
Once logged in, the first screen that will be visible is the Document Search screen. Here is where you can search for documents or folders, using their metadata, with the ability to have up to 4 search criteria using logical operators.

Folder Search Sub-Screen

(Note: When more than one logical operator is used in a statement, NOT is evaluated first, then AND, and finally OR)

(Retrieves a folders from the find menu)

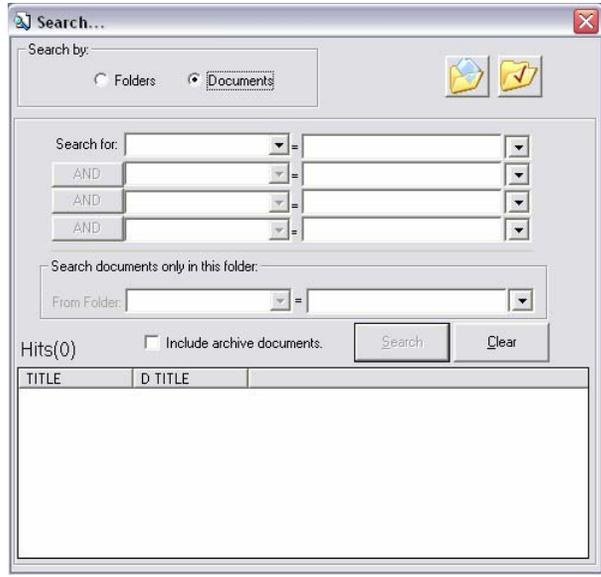
- Once within the Search Sub-screen
- Choose Folders
- Complete requested information
- Click the Search Button
- Once the folder/document has been located
- double click on the folder within the returned results
- The folder will then be displayed



Document Search Sub-Screen

(Retrieves documents from the find menu)

- Once within the Search Sub-screen
- Choose Documents
- Complete requested information (To narrow down the search for documents you may also choose folder criteria to search upon)
- Click the Search Button
- Once the document has been located double click on the document within the returned results
- The document will then be displayed



Creating a New Folder

(Creates a new folder)

There are a number of places where the Add Folder options are available.

- On Document Search screen click the  Add Folder button
- Right click on the main screen and select Add Folder
- Double Click on main screen
- Go to Windows menu and select Add Folder
- On the Quick Access toolbar click the  Add Folder Button

Once the Add Folder option has been selected, the Folder/Document interface should be visible.

Click the Add button on the right hand side of the Folder information

At least one field has to have a value for the folder to be created.

Select an Archive Date if desired.

Click Update

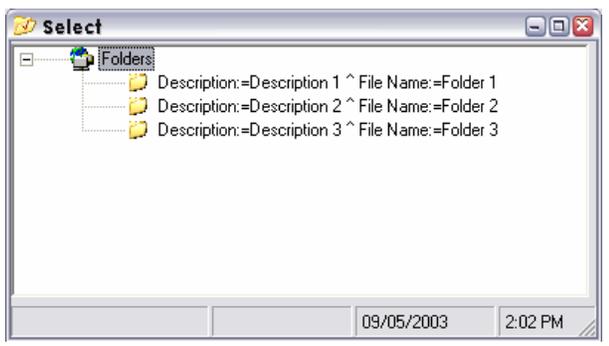
A new folder has just been created.

Viewing All Folders/Document in Tree View (Select Sub-Screen)

(Shows in Tree View form all the folders/documents available)

There are a number of places where the Select screen options are available.

- On Document Search screen click the  Select button
- Right click on the main screen and choose Select
- Go to Windows menu and choose Select
- On the Quick Access toolbar click the  Select Button



Once the Select option has been selected, the TreeView interface should be visible.

Double Click on any Folder to view its corresponding Documents.

Double Click on any Document and the Folder/Document screen will pop-up at the folder selected.

Options Available in Tree View

Right Click on Select Screen

Select Screen popup menu options:

- Add Folder
- View Folder
- Delete Folder
- Add Document
- View Document
- Delete Document
- Refresh

Adding a Document to a Folder

(Add a document to an open file)

Once the correct folder is open in which the document needs to be added

Click the Add Doc button on the bottom of the screen

Sub-screen entitled "Document Information" will pop-up.

Complete the needed information

Choose the Document Source

Click on Update/Save Button on the bottom of the folder

Import Screen will pop-up

Click on the Browse button located on the sub-screen to choose the location and then the document to be added to the file.

Click on the Open button on the sub-screen, once the document has been chosen.

The document has been added to the file.

To Update the Document

(Saving Changes to the Document)

Once on the correct file

Click on the Update Doc Button on the bottom of the Folder

Sub-screen entitled "Document Information" will pop-up

Make the needed changes

Click on the Update/Save Button on the bottom of the Folder

The changes have been saved

To View Documents in a Thumbnail view

(Note: only TIF documents can be viewed in Thumbnails)

Right Click on TIF image

Choose Thumbnail View from popup menu

TIF image is now in thumbnail view

The thumbnail can be double clicked and it will be opened in a new window. This can be repeated as many times as desired.

To Delete a Document

(Removes an Existing Document from a Folder)

Open the folder that has the document that needs to be deleted

Locate the file that holds the document that needs to be deleted

Highlight the document that needs to be deleted

Click on the Delete Button located on the bottom of the folder

The Document has been deleted

Once an item has been deleted it cannot be restored.

Document Search View (Main Menu)

File

Archive

(Archives folders to a specified archive. This feature is only available to admins)

Go to File on the Main Menu

Click Archive

Archive sub-screen will appear

Select Folders to Archive

Click Archive

Files are archived to the specified location

Export Viewer Media/Active Disk

(Exports a set of selected data to an external media)

Click on the File button on the main menu

Highlight the Export Tab

Select to either Export to Viewer Media or Active Disk

A Sub-Menu will open

Specify the location of the export media

Select the files that are to be exported

Select the Export button to apply selections

Select Scanner

(To select needed Scanner)

Go to File on the Main Menu

Click on Select Scanner

Scanner sub-screen will appear

All scanners that have been installed on the current system will be listed

Highlight the scanner that is to be use

Hit Ok – the system is set to recognize that scanner

Scan Preference

(To indicate the quality of the scanned document)

Go to File on the Main Menu

Click open File

Click on scan preference

Choose desired options

Best Display – Good Display – Smallest File Size – Custom Setting

Tools

Batch Processing (Scan/Import)

Go to Tools on the Main Menu
Click Batch Processing
Select Scan/Import
Batch Information screen will open
Select a Job from the drop-down list
Select a Folder to put the files
Set the batches priority
Click OK
Scan/Import screen will open
Click either Scan or Import to begin
Scan or Select documents to imported to the selected folder

Batch Processing (Index)

Go to Tools on the Main Menu
Click Batch Processing
Select Index
Index screen will open
Select an Available Batch to Index from the drop-down on the top left
Fill in appropriate fields for each document in the batch
Click Commit after completing the documents index information
The next document in the batch will appear
Repeat Steps for each document in a batch

Batch Processing (Doc Manager)

Go to Tools on the Main Menu
Click Batch Processing
Select Doc Manager
Doc Manager screen will open
Right click on the Doc Manager to see its menu
Set the Refresh Rate (refreshes the Doc Manager to check if new Batches have been processed and updates screen)

Folder View (Main Menu)

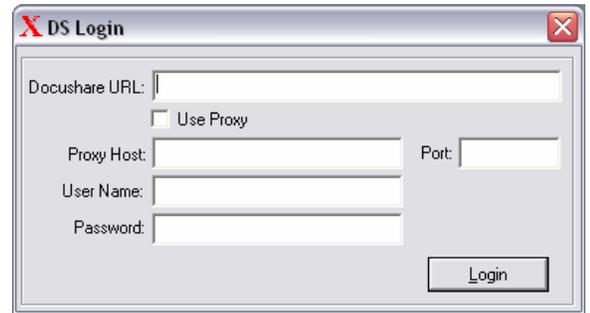
File

DocuShare Upload

(Transfers Edge Document File to DocuShare)

DocuShare is a web-based system for storing and managing information. Once the DocuShare software has been installed on a web server any authorized user can quickly and easily post, manage, search on and retrieve information. DocuShare is file format-, platform- and browser-independent, allowing any user on any system to post and retrieve information in any format. DocuShare requires no plug-ins or add-on software, so everyone can immediately access information using their standard web browser. You don't need a webmaster with DocuShare – you don't even need to know HTML. DocuShare offers powerful features that provide cost-saving benefits for users.

- Click the File button on the main menu
- Choose DocuShare Upload
- Or Click the DocuShare "X" on the toolbar
- The DS Login screen will appear.
- Enter URL
- Enter user name and password –
- This will be your DocuShare name and password**
- DocuShare Upload Sub-screen will open
- Drag and Drop files from Edge to DocuShare



EdgeVault Upload

(Transfers Edge Document File to EdgeVault)

EdgeVault™ e-Content Management Secure Portal takes IDS core values of scalability, customizability, dependability and easy to integrate technology to a new level and makes it easier than ever to seamlessly integrate Document Capture and Management, Archive Management and Workflow directly into business applications.

- Click the EdgeVault button  present at the top of the screen
- The iManage Upload Interface will Open
- Select an EdgeVault Organization from the dropdown box
- Select what folder you want to place the file in or enter a New Folder Name in the field at the bottom of the screen
- Give the File being uploaded a description (if desired)
- Click Upload to copy the file into EdgeVault

iManage Upload Interface

(Transfers Edge Document File to iManage)

iManage Worksite is a document management system designed as a n-tier client/server application which makes it highly scalable, easy to deploy, and capable of supporting a variety of fault tolerant strategies. Once the iManage Desksite is installed on the workstation an authorized user can upload documents from Edge 2004™.

To access the iManage Upload Interface double click on the document to be uploaded from the select screen.

- Once the document screen is shown click on the iManage icon  present at the top of the screen to bring up the iManage Upload Interface.

To upload the document to iManage Worksite:

You are required to enter the login information - iManage Server Name, UserID, Password

Once the Login Information is authenticated, Database names existing on iManage Server are populated under Database field as a drop down box

After entering the relevant fields, choose the destination to which document has to be uploaded under the iManage Destination Options

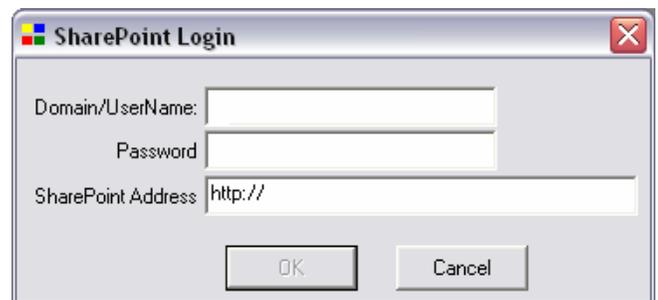
Click Upload File to upload the document to the selected destination.

SharePoint Upload

(Transfers Edge Document File to SharePoint)

SharePoint is a web-based portal for storing and managing information. Once the SharePoint Portal Server software has been installed on a web server any authorized user can quickly and easily post, manage, search on and retrieve information

Click the  button on the toolbar
The SharePoint Login screen will appear
Enter user Domain/UserName and Password –
This will be your NT username and password
Enter SharePoint Address
Click OK
SharePoint Upload Sub-screen will open
Drag and Drop files from Edge to SharePoint


Start Workflow (requires Edge Workflow Module) – to Attach Current Document

A workflow streamlines and automates locally and across the enterprise via e-mail & web delivery. It captures document assets and converts them into centralized electronic knowledge assets. It also eb-connects the extended enterprise to automated work processes through the design and deployment of XML "smart forms".

Choose Start Workflow
Key Flow Attachment Sub-Screen will pop-up
Select attach the current document
Click on the Browse Button to locate a template
Enter description of workflow
Choose the desired options – if available
Choose desired rules if available
Click Start

Start Workflow – to Attach a Current Folder

(Starts a workflow attaching a folder for review)
Choose Start Workflow
Key Flow Attachment Sub-Screen will pop-up
Select attach the current folder
Click on the Browse Button to locate a template
Enter description of workflow
Choose the desired options – if available
Choose desired rules if available
Click Start

Start Workflow – No Attachment

(Starts a workflow with no documents attached)

Choose Start Workflow

Key Flow Attachment Sub-Screen will pop-up

Select no attachment

Click on the Browse Button to locate a template

Enter description of workflow

Choose the desired options – if available

Choose desired rules if available

Click Start

Email Folder/Document

(Attaches the current document or folder to an email message)

Open Document/Folder to be emailed

Click File on Main Menu

Choose Email and then either Document or Folder

The single document or all documents in a folder are now attached to an email

Export - Viewer Media

(Exports a set of selected data to external media)

Click File on Main Menu

Select Export and then Viewer Media from drop down

A Sub-screen will pop-up

Browse to the location to export the media to

Select the folders that are to be exported

Click the Export button

(See Chapter 4 for detailed explanations for Export Options)

Print – Folder/Document

(To print the current Folder or Document)

Open the Document/Folder to be printed

Click File on Main Menu

Choose Print > Document or choose Print > Folder

Print Sub-screen will pop-up

Select the correct printing options

Click OK or Options (if changes to the printer are needed)

The Document/Folder will be printed to the designated printer

View**Scale to Gray**

(NOTICE: only black and white documents can be scaled to gray. Using this feature on color documents has no effect)

(To view documents in Gray Scale)

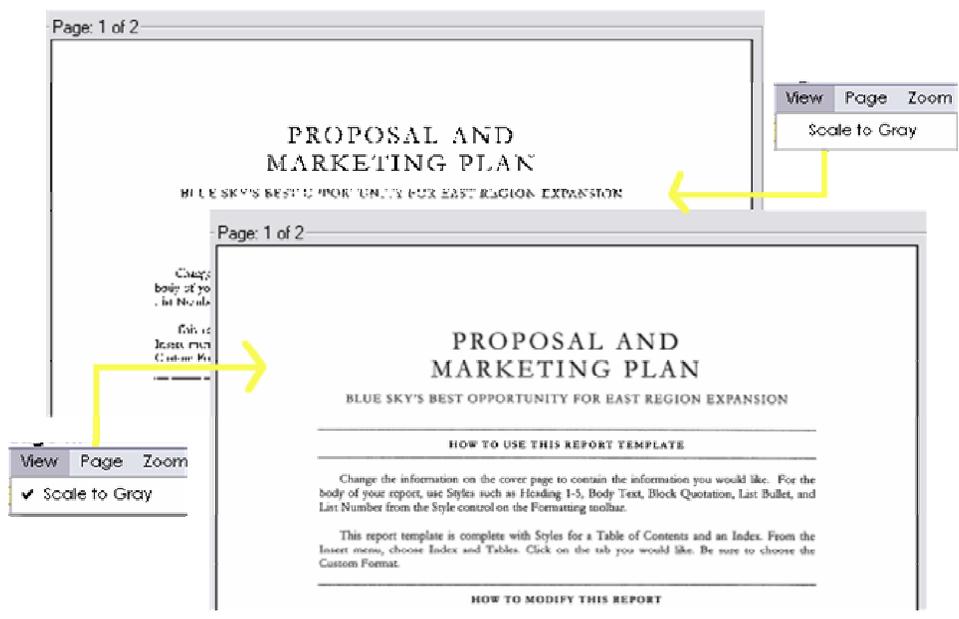
Open the File

Choose the Document

Select View on Main Menu

Choose Scale to Gray

This will change the gray scale on the Document only.



Page

(Page Menu only available for TIF documents)

The Page menu, while in Folder View, gives you the ability to locate different pages within a folder as well as delete, rotate, insert and append pages to documents.

First

(Retrieves the first page of the Document)

- Click on Page on Main Menu
- Select First from the menu
- First page of document will automatically load

Previous

(Retrieves the Previous page of the Document)

- Click on Page on Main Menu
- Select Previous from the menu
- Previous page of document will automatically load

Next

(Retrieves the Next page of the Document)

- Click on Page on Main Menu
- Select Next from the menu
- Next page of document will automatically load

Last

(Retrieves the Last page of the Document)

- Click on Page on Main Menu
- Select Last from the menu
- Last page of document will automatically load



Delete Page (Current Image)

(Deletes current page being viewed in folder)

Open Folder
Choose page to be deleted
Click Page on Main Menu
Select Delete Page
Sub-screen will pop-up
Select *Delete current image page*
The documents current page will be deleted and cannot be restored

**Delete Page (Entire Image)**

(Deletes the entire document being viewed in folder)

Open Folder
Choose page to be deleted
Click Page on Main Menu
Select Delete Page
Sub-screen will pop-up
Select *Delete entire image file (all pages)*
The document will be deleted and cannot be restored

Delete Page (Pages)

(Deletes specified pages from document being viewed in folder)

Open Folder
Choose page to be deleted
Click Page on Main Menu
Select Delete Page
Sub-screen will pop-up
Select *Pages 1 -* ____
The listed pages will be deleted and cannot be restored

Rotate Left

(Rotates page 90 degrees to the left)

Open page to be rotated
Select Page on Main Menu
Select Rotate Left
The document will be rotated 90 degrees to the left

Rotate Right

(Rotates page 90 degrees to the right)

Open page to be rotated
Select Page on Main Menu
Select Rotate Right
The document will be rotated 90 degrees to the right

Flip

(Rotates the page 180 degrees)

Select Document and Page to be flipped
Select Page from the Main Menu
Select Flip
The document will flip 180 degrees

Insert TIF from Scanner

(Inserts document from scanner)

Open folder in which the file is to be added
Select the document to have file added
Go to page where file is to be inserted
Select Page from the Main Menu
Select Insert TIF and then From scan... from the dropdown menu
Import Sub-screen will pop-up
Click scan document
Click OK to insert the document
Document is inserted into document

Insert TIF from File

(Inserts document from file)

Open folder in which the file is to be added
Select the document to have file added
Go to page where file is to be inserted
Select Page from the Main Menu
Select Insert TIF and then From file... from the dropdown menu
Import Sub-screen will pop-up
Click Browse to locate file to be inserted
Click Open when file is found
Click OK to insert the file
Document is inserted into document

Append TIF from Scanner

(Appends document from scanner)

Open folder in which the file is to be added
Select the document to have file added
Go to page where file is to be inserted
Select Page from the Main Menu
Select Append TIF and then From scan... from the dropdown menu
Import Sub-screen will pop-up
Click scan document
Click OK to append the document
Document is appended to the document

Append TIF from File

(Appends document from file)

- Open folder in which the file is to be added
- Select the document to have file added
- Go to page where file is to be inserted
- Select Page from the Main Menu
- Select Append TIF and then From file... from the dropdown menu
- Import Sub-screen will pop-up
- Click Browse to locate file to be inserted
- Click Open when file is found
- Click OK to append the file
- Document is appended to the document

Zoom

(Zoom Menu only available for TIF documents)

Zoom In

(To make the document larger)

- Choose Zoom on Main Menu
- Select Zoom In
- The document will appear larger
- This function can be performed consecutively

Zoom Out

(To make the document smaller)

- Choose Zoom on Main Menu
- Select Zoom Out
- The document will appear smaller
- This function can be performed consecutively

Fit to Height

(To make the document fit the height of the window)

- Choose Zoom on Main Menu
- Select Fit to Height
- The document will resize to fit the height of the document window.

Fit to Width

(To make the document fit the width of the window)

- Choose Zoom on Main Menu
- Select Fit to Width
- The document will resize to fit the width of the document window

Best Fit

(To view the complete document)

- Choose Zoom on Main Menu
- Select Best Fit
- The document will resize to the best fit for the document window

| |
|----------------|
| Zoom In |
| Zoom Out |
| Fit to Height |
| Fit to Width |
| Best Fit |
| Actual Size |
| Thumbnail View |
| 25% |
| 50% |
| 75% |
| 100% |
| 200% |
| 400% |
| Custom... |

Actual Size

(To view the documents original scanned size)

Choose Zoom on Main Menu

Select Actual Size

The document will resize to the original size of the documents that was scanned or imported into the folder

Thumbnail View

(To view the documents as Thumbnails)

Choose Zoom on Main Menu

Select Thumbnail View

The current document will now be shown as thumbnails

Custom

(Customizes the zoom view)

Choose Zoom on Main Menu

Select Custom

Custom Sub-screen will pop-up

Indicate the size that you would like the document to display

The document can display from 2 to 6553

Click OK

The document will resize to the requested size

Annotation

(Annotation Menu only available for TIF documents)

Annotations are ways to mark up and add notes to TIF documents. Annotations consist of underlining, highlighting, attaching notes and stamping selected sections of the currently opened document. Several annotations can be made to the document one at a time. Annotations can be used to communicate information about a document to all users who have access to that document.

CAUTION:

Please note that once annotations are burnt - in, they become a permanent part of the document and cannot be removed. Burnt - in annotations also become black and white and non-transparent, losing the colors originally assigned to them.

More detailed information about how to use each annotation is available in Chapter 4: Using Edge 2004™.

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menu commands



Main Menu Options (Document Search View)

File

Archive

Archives folders based on an given archive date. The archive path is set by the Administrator at setup.

Export Active Disk

This feature will export your current folder into an existing active disk. (See Chapter 4 – Export Options for detailed explanation).

Export Viewer Media

Exports a set of selected data to an external media. An Output Folder called Export is created under your Edge 2004™ folder. Once exported, copy over the **contents** of this folder to any removable media such as a CD-ROM, Zip disk, or mini-USB. Run setup.exe to install Edge Export Viewer to another computer and this screen will show up. Choose Install Edge 2004 Export Viewer on this computer. After it has been installed, run setup.exe again and choose View documents on this computer.

Select Scanner

A dialog box opens showing the installed TWAIN scanners. This allows the user to select from the scanners available.

Scan Preference

Opens a dialog box, which shows the available scanning preferences. Available options depend on the selected scanner.

Options

Administration

Refer to Chapter 1 for details.

Tools

Batch Processing (Scan/Import)

The Scan/Import function allows the user to Scan or import documents into a chosen folder.

Batch Processing (Index)

The Index function allows the user to Index the documents from the batch process.

Batch Processing (Doc Manager)

The Doc Manager keeps track of current batches in the system. Batches that are shown in the Doc Manager are the batches that have not yet been indexed. Right click on the Doc Manager to see its menu. In Doc Manager you can also change a batches priority and status except for those batches that are put On Hold.

Window

Add Folder

Opens/Closes Add Folder Screen

Select

Opens/Closes Select Screen

Search

Opens/Closes Search Screen

Help

Help Topics

Displays the table of contents for the online help system. This online help system is a comprehensive reference that gives you information about every feature. The help system gives you a choice of three ways to look up helpful information.

Table of contents: This list consists of book icons that explain every item in Menu Toolbar as well as other important information. You can expand the books to locate additional topics within each category.

Index: This allows you to enter a keyword so you can look for an associated topic.

Full Text Search: This feature lists all the topics that include the keyword you specify.

About

Displays the registration screen and the current version.



Main Menu Options (Folder View)

File

New Folder

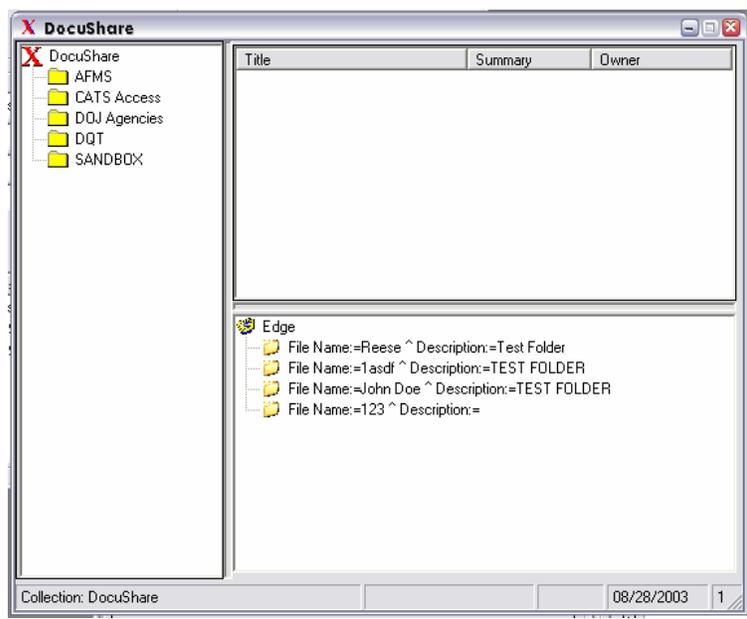
Allows the user to add new folder(s). Field names can be customized by the administrator and created very easily. At least one field is required. The maximum number of fields that an administrator can add to a folder is 14.

New Document

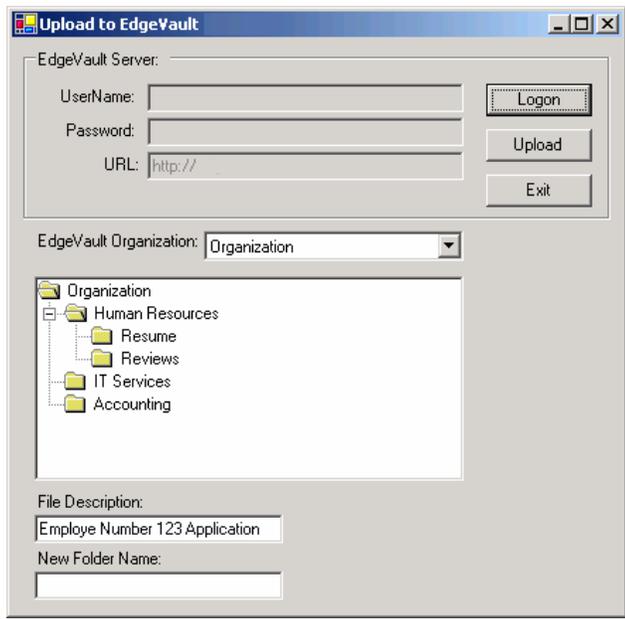
Allows the user to add new document(s). Field names can be customized by the administrator and created very easily. At least one field is required. The maximum number of fields that an administrator can add to a folder is 14.

DocuShare Upload (Password Protected)

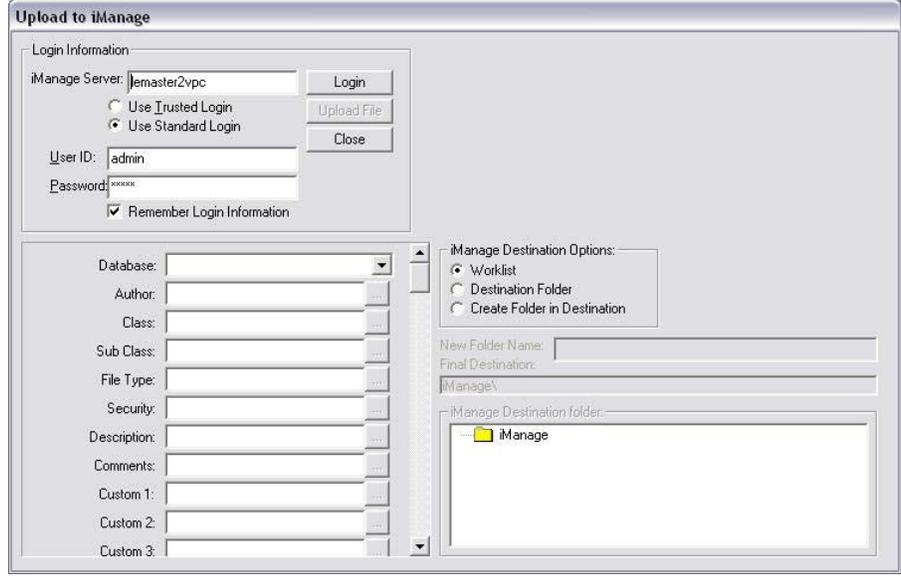
Allows all users to upload the selected document(s) to a DocuShare Repository as well as upload documents into Edge. Documents and Folders can be moved between DocuShare and Edge using its Drag and Drop feature. Select an DocuShare Collection from the left and its contents will be shown in the top right of the screen. The bottom half of the screen are all the files that are currently in Edge 2004™.



EdgeVault Upload (Password Protected)
EdgeVault™ e-Content Management Secure Portal takes IDS core values of scalability, customizability, dependability and easy to integrate technology to a new level and makes it easier than ever to seamlessly integrate Document Capture and Management, Archive Management and Workflow directly into business applications. The EdgeVault Platform is a hierarchy of organizations, folders and files. At the "top" of the hierarchy is the organization. *Organizations* are collections of files, folders, users and groups that share a common administrator. Users can access information in an EdgeVault repository from anywhere in the world, limited only by the security put in place by the system administrator.

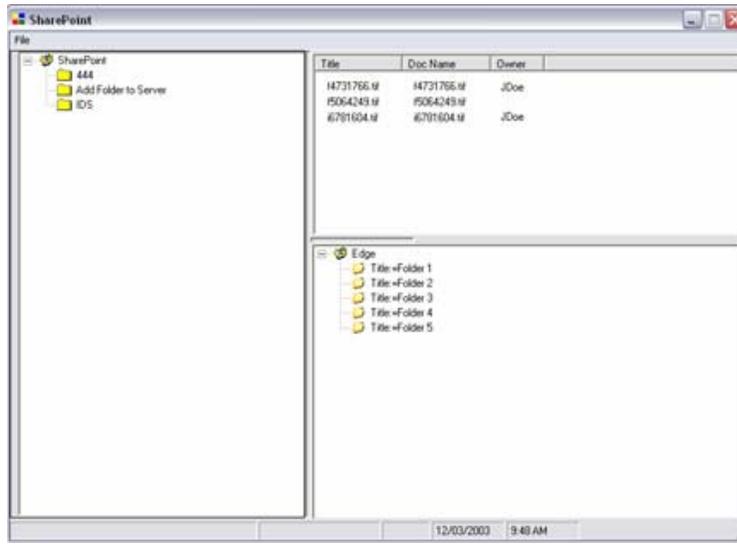


iManage Upload Interface (Password Protected)
iManage Worksite is a document management system designed as a n-tier client/server application which makes it highly scalable, easy to deploy, and capable of supporting a variety of fault tolerant strategies. Once the iManage Desksite is installed on the workstation an authorized user can upload documents from Edge 2004™. iManage provides users to search repositories of millions of documents, to search documents based on document content, share document with other users, checkin and checkout documents, create new versions of documents, track document usage and history.



SharePoint Upload (Password Protected)

A web-based portal for storing and managing information. Once the SharePoint Portal Server software has been installed on a web server any authorized user can quickly and easily post, manage, search on and retrieve information. Documents and Folders can be moved between Edge and SharePoint using its Drag and Drop feature. Select an SharePoint Collection from the left and its contents will be shown in the top right of the screen. The bottom half of the screen are all the files that are currently in Edge 2004™. (See Chapter 4 for further details)



Start Workflow (Requires Edge Workflow Module)

A workflow streamlines and automates locally and across the enterprise via e-mail & web delivery. It captures document assets and converts them into centralized electronic knowledge assets. It also eb-connects the extended enterprise to automated work processes through the design and deployment of XML "smart forms".

Email Folder/Document

Allows the user to email the displayed document or image using MAPI compliant email software. It also allows the user to email the entire folder. The email software must already be installed and configured for use. The index data will be placed in the body of the email message and the associated image(s) will be the attachment. A Group IV TIFF image can only be converted to a PDF before being sent. All other images will be attached with the original TIFF format. If a whole folder is attached it will be in a zip file format.

Export - Viewer Media

Exports a set of selected data to an external media. An Output Folder called Export is created under your Edge 2004 folder. Once exported, copy over the **contents** of this folder to any removable media such as a CD-ROM, Zip disk, or mini-USB. Run setup.exe to install Edge 2004 Export Viewer to another computer and this screen will show up. Choose Install Edge 2004 Export Viewer on this computer. After it has been installed, run setup.exe again and choose View documents on this computer.

Export – Active Disk

This feature will export your current folder into an existing active disk. (See Chapter 4 – Export Options for detailed explanation).

Print

Allows the user to print either the displayed document or the whole folder.

Select Scanner...

A dialog box opens showing the installed TWAIN scanners. This allows the user to select from the scanners available.

Scan Preference

Opens a dialog box, which shows the available scanning preferences. Available options depend on the selected scanner.

View

(NOTICE: only black and white documents can be scaled to gray. Using this feature on color documents has no effect)

Scale to Gray

To view document in gray scale

Page

(Page Menu only available for TIF documents)

Next

Displays the next page in a multi-page TIFF image.

Previous

Displays the previous page in a multi-page TIFF image.

First

Displays the first page in a multi-page TIFF image.

Last

Displays the last page in a multi-page TIFF image.

Delete Page (Current Image)

Deletes current page being viewed in folder.

Delete Page (Entire Image)

Deletes the entire document being viewed in folder.

Delete Page (Pages)

Deletes specified pages from document being viewed in folder.

Rotate Left



Rotates the displayed image 90 degrees to the left.

Rotate Right

Rotates the displayed image 90 degrees to the right.

Flip

Rotates a displayed image by 180 degrees.

Insert from Scan...

Will allow the user to scan an image and insert it right before the currently displayed image.

Insert from File...

Inserts a file-based image before the currently displayed image.

To insert images from a file

Append from Scan...

Appends the scanned TIFF image(s) at the end of existing image(s) of that document.

Append from File...

Appends TIFF image(s) at the end of the existing image(s) of a document.

Zoom

(Zoom Menu only available for TIF documents)

You can zoom or scale the display of images. To do so, select the desired zoom option from the Zoom menu. The images in the selected view window will be resized accordingly. The following zoom options are supported...

Zoom In

Zooms in on the displayed image.

Zoom Out

Zooms out on the displayed image.

Fit to Height

Fits the image to the height of the window.

Fit to Width

Fits the image to the width of the window.

Best Fit

Fits the image to the size of the window.

Actual Size

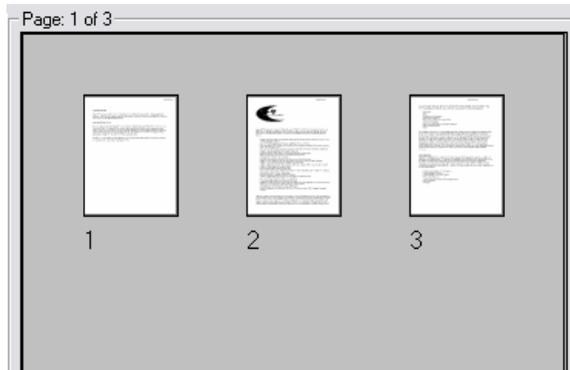
Displays the relative size of the original image regardless of the resolution.

Percentages

Zooms the image to the selected percentage.

Thumbnail View

Displays TIF image pages as thumbnails in document screen.



Annotations



Annotations are electronic marks commonly used on documents in a paper-based environment; for example, redacting, highlighting, rubber stamps, and text notes. Annotation marks can be saved within a TIFF image file as annotation data that is kept separate from the image data. The marks can also be merged with the image data in a process known as burning-in. To save annotations to any file type other than TIFF, the annotations must be burned-in. (Annotations are covered more in depth in Chapter Three)

View Toolbar

Displays the Annotation Toolbar.

Delete Selected

Deletes the selected annotations. To be deleted, annotations must first be selected using the Select Annotations Tool.

Hide Annotations

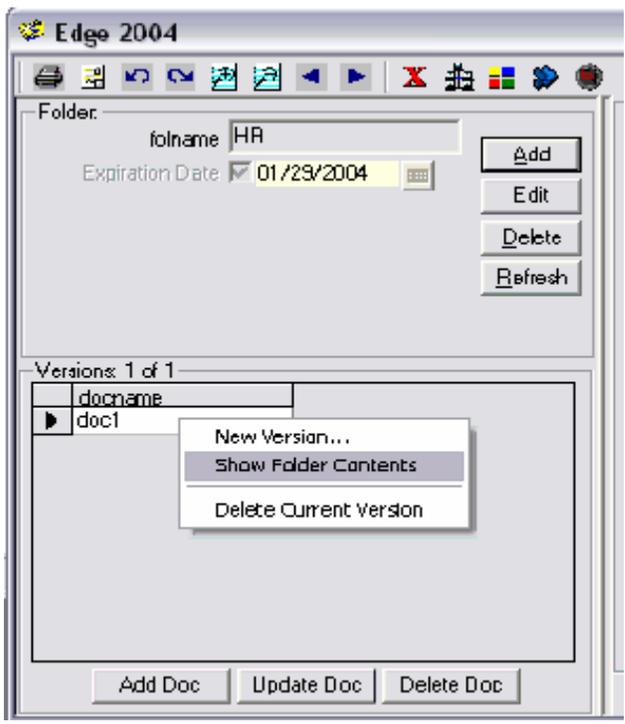
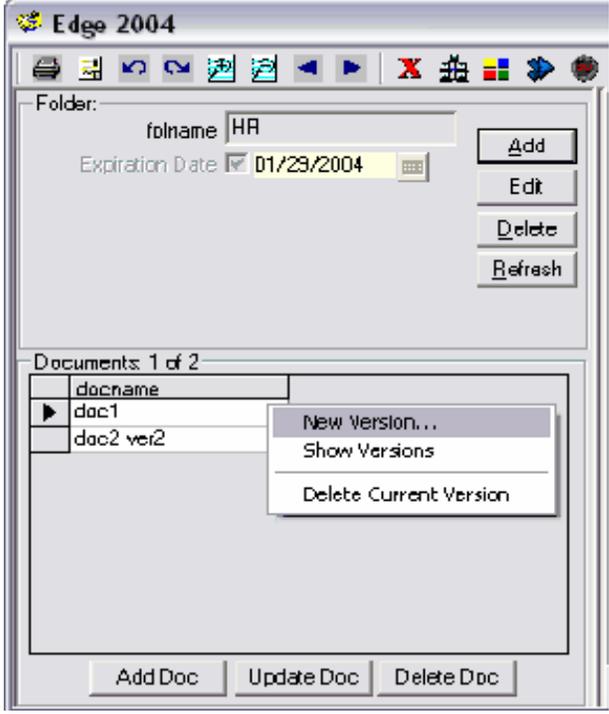
Hides all annotations on the displayed image.

Burn-In Annotations

Burning-In converts the annotation marks into image pixels and merges them with the underlying image pixels. Once annotations are burned-in, they become part of the base image and can no longer be changed or removed.

Version

Version Control is one of the many new features of Edge 2004. It can be accessed by version button in Folder menu and also by right click on the selected document in the folder view.



It gives the following options on the selected document and selected version

- New Version This option allows the user to create new version for the selected document.
- Show Versions This option allows the user to view all the versions for the selected document.
- Delete Version This option allows the user to delete the current selected version of the document
- Show Folder Contents This option allows the user to view the existing documents with their latest versions if existing in the Folder

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using Edge 2004



Organizing Folders

Plan before you create your folders so there is good structure to your setup. If you know how everything will be categorized or separated now, it will be a lot easier when you start importing your files.

Start by clicking on **Add** in the folder section. Fill in the proper fields and create as many folders as you need.

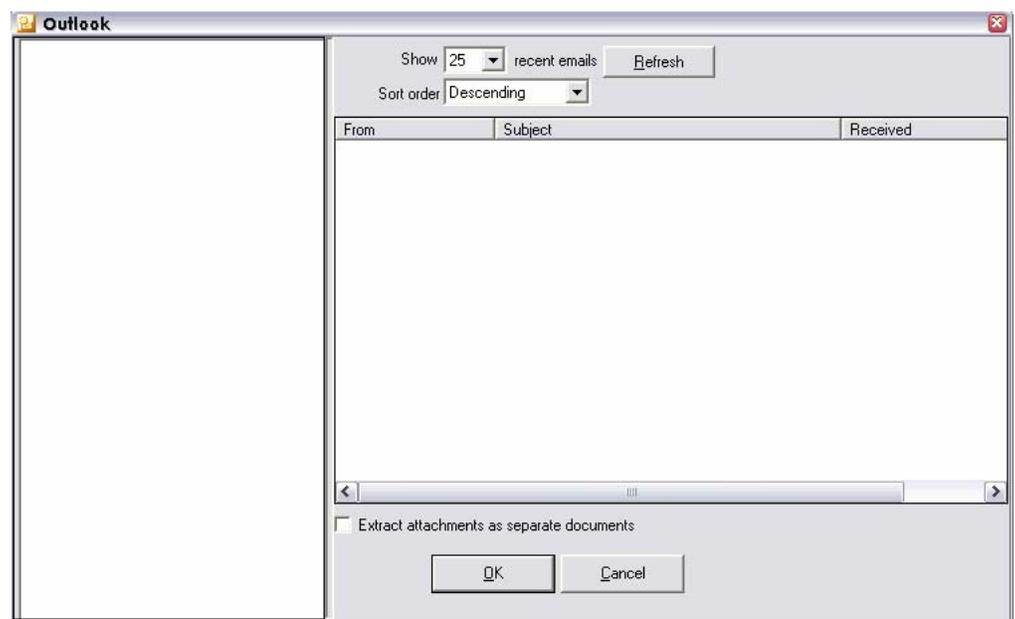
Documents

The documents section of the screen contains separate integrated functions to display indexed information. It provides easy access to the list of images pertaining to the folder. Through the use of indexed information entered when each new document is added, users are able to quickly select and view the document in the document screen. In addition to Add Doc, Update Doc, and Delete Doc buttons at the bottom of the screen, the user is required to complete at least one field on the New Document screen. The information that is entered, which is stored in a database, will be associated with its corresponding document.

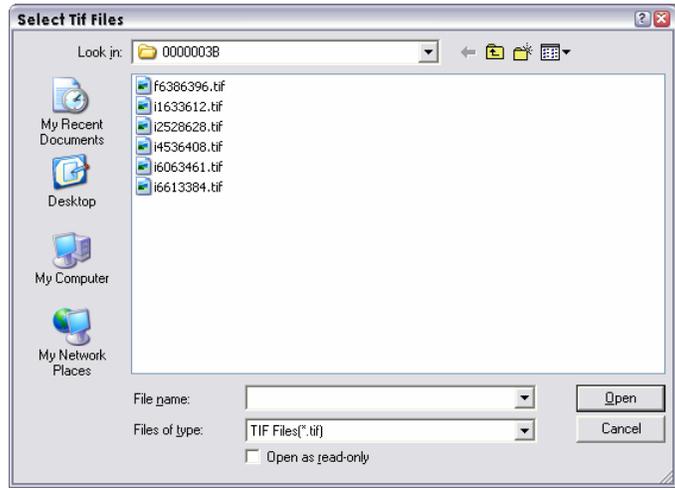
If the documents section is double clicked (for TIF documents only) the document will be opened in another screen. This can be useful for comparing documents. The same is true while in Thumbnail View.

Document Source Options

Email: When you select 'Email', you will be presented with the following dialog box, which enables you to choose the email that you want to import into Edge 2004™.



TIF: If you select 'TIF or BMP Files' you will be presented with the following window.



Select files and then Click open, and these files will be added to the current folder.

MFD: This option will open a select file dialog box with the path preset to the MFD path that you have specified.

Scanner: This option will allow you to scan files from within Edge, if you have a Scanner installed.

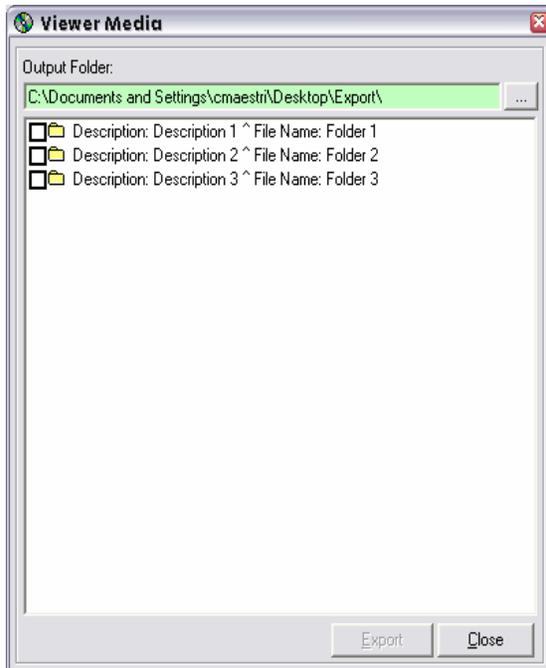
All Files: If you select 'All Files', Edge 2004™ opens a 'File Open' dialog box. You can select the file you want to import. If the file is a MS Office file, a PDF file, an htm file or any other format that Internet Explorer recognizes, it will display it in the Document Viewer. If it is an unrecognized format, Edge will open the file in its native application, while maintaining a link in the document viewer.

Export Options

There are many ways to share your documents in Edge 2004™ with other people. You can print, export to viewer media, export to active disks, email, start a workflow, send to DocuShare, SharePoint, iManage, or EdgeVault and archive files and documents.

Export to Viewer Media

Gives the user the ability to export single or multiple folders to an external media source (i.e. CD-ROM, Jazz, Zip), in order to transport them to a user or client workstation. An Edge Viewer is packaged with the exported files in order to allow the end-user access to the files on the transport media.



1. Go to File → Export → Viewer Media.
2. Select the location to export the Viewer Media package. (For example B: Exported Media).
3. Select the folders to include with the Viewer Media package.
4. Press **Export**.
5. Navigate to the Output Folder using Windows Explorer and transfer the contents of the folder (**not the folder itself**) to your external media source. If transferring to a CD-ROM use, a local CD creation software.
6. Run the **setup1.exe** file to install the Edge Viewer Media to another computer.
7. Click on **Install Edge 2004 Viewer on this computer**. Accept the license agreement and proceed with the installation.
8. Run the **setup1.exe** file again and click on **View documents on this computer** to run the Edge 2004™ Viewer

Export to Active Disk

Gives the user the ability to export single or multiple folders to Iomega Products in order to create an Active Disk which will launch and run the Edge 2004™ product directly from the new media.



1. Go to File → Export → Active Disk.
2. Select the location for the exported Active Disk to be created. (For example E:\Removable Disk)
3. Select the folders to include with the Active Disk package.

NOTE: Database fields must match existing Active Disk fields in order to export.

4. Press **Export**.
5. Now run Edge 2004™ product that has Active Disk. The folders you exported should now be appended to your existing Active Disk.

Annotations

View Toolbar: This function brings up a dialog box with icons pertaining to specific functions needed to create and use annotations. Each annotation is described below in further detail.

 **Select Annotations:** This is the only tool that does not create an annotation. The Select Annotation tool is used to select single or multiple annotations that have already been created in order to move them within the document or to delete ones that are no longer required. You can select multiple annotations by placing the mouse on one of the annotations and left clicking the mouse at the same time holding the control key. You can also select multiple annotations by dragging a selection rectangle created by holding left mouse button and drawing rectangle around multiple annotations. The icon for Select Annotations is an arrow.

 **Freehand Line:** The Freehand Line tool is used to draw a freehand line on a section of text or a portion of an image for emphasis. The icon for this is a squiggly line. To create a Freehand Line, click the icon, then move the mouse to where you would like to start your freehand line on a document, hold down the left mouse button, and drag the mouse to create a line. When the desired line or shape is created, release the mouse button to stop drawing. Right clicking on the icon brings up the Freehand Line properties, which consists of line width in pixels, color of line and whether or not the line is transparent.



Highlighter: The Highlighter tool allows you to highlight a portion of an image in a square or rectangular shape. To begin highlighting, click the icon, then move the mouse to a section which you would like to highlight, hold the left button down, and drag out over the desired section and let go of the mouse. The icon for this is a crayon. Right clicking on this icon brings up the Highlighter properties. Color selection is the only option for the Highlighter.



Straight Line: The Straight Line tool is used to underline text, demarcate a section of a page, or draw callout lines. The icon for this is a slanted straight line. To create a straight line, click the icon, move the mouse to where you would like to start the line on a document, hold down the left mouse button, and drag to where you want the end point to be and release the mouse. Right clicking on this icon brings up the Straight Line properties. Your options are line width in pixels, color of line, and whether or not the line is transparent.



Hollow Rectangle: The Hollow Rectangle tool is used to place a border around areas of an image or text for emphasis. To create a border, click the icon, then move the mouse to a corner section which you would like to frame, hold the left button down, and drag out over the desired section and let go of the mouse. The icon for this is an empty rectangle. Right clicking on this icon brings up the Hollow Rectangle properties. You may select the rectangle's border width in pixels, color, and whether or not the border is transparent.



Filled Rectangle: The Filled Rectangle tool is used to create a color background for text annotations or to redact a portion of an image. To create a Filled Rectangle, click the icon, then move the mouse to a section which you would like to fill, hold the left button down, and drag out over the desired section and release the mouse button. The icon for this is a filled in rectangle. Right clicking on this icon brings up the Filled Rectangle properties. You may select the rectangle's color.



Text: The Text tool is used to enter text directly on an image. The icon for this is the letters "ab". To create Text, select the icon, move the mouse to a section which you would like to add text, click, and begin typing. Right clicking on this icon brings up the Text properties. You may select the text font, style, size, effects, color, and script.



Attach-a-Note: The Attach-a-Note tool allows you to add notes to images. This is a good way for users to communicate with other users who are viewing the same images. The icon for this is a piece of paper. To create a note, click this icon, then move the mouse to a section which you would like to notate, hold the left button down, and drag out over the desired section and release the mouse button. Right clicking on this icon brings up the Attach-a-Note properties. You may select the notes background color and font properties.



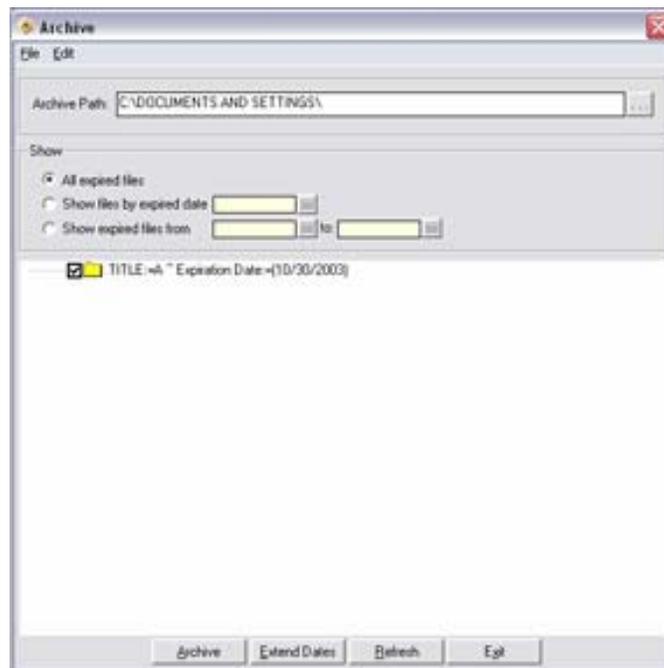
Text From File: The Text From File tool is used to enter text from a file onto an image. The icon for this is an open folder. To insert text from a file, click the icon, and click where you want to place the text on your document. The Select Text File Document dialogue appears. Choose a .txt file and select OK. Right clicking on this icon brings up the Text From File properties. You may select the text font, style, size, effects, color, and script.

 **Rubber Stamp:** The Rubber Stamp tool is used to place an image or text stamp onto an image. The icon for this is a rubber stamp. To insert a Rubber Stamp, click the icon, choose an appropriate location on the document, and stamp by clicking the left mouse button. Right clicking on this icon brings up the Rubber Stamp properties. You may select from pre-designated text including Approved, Draft, Received and Rejected. The current date appears at the end of each of those options. You may also create text or create an image to place in as the Rubber Stamp.

Archive

Archives folders based on a given archive date. The archive path is set by the Administrator at setup. This feature is only available to administrators. The Archive feature can be found under File on the Main Menu (Document View) or by right clicking within the main interface. (NOTE: if folders are archived to other media instead of locally archived files will not be able to be viewed when searched for)

Upon an administrator's login, if there are folders that have expired they will be prompted with the following screen:



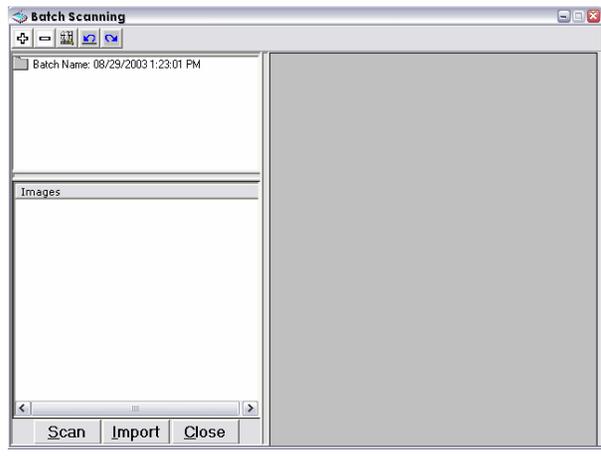
The administrator also has the option to extend the archive date for the expired folders before archiving them. Select the folders that you want to extend the dates for and then click Extend Dates button at the bottom of the screen and select a new date from the calendar.

To archive the selected folders, select the folders that you wish to archive and then click the Archive button at the bottom of the screen. The folders will be archived to the path shown in the Archive Path field.

Batch Processing (Scan/Import)

The Scan/Import function allows the user to Scan or import documents into a chosen folder.

Documents within the Batch Scanning screen can be rearranged by dragging and dropping pages into other documents within the screen. Documents are shown with each page being listed to enable the dragging and dropping of pages into other documents.



Scan/Import Menu

| | |
|-----------------------|--------|
| Create Document | Ctrl+D |
| Split | |
| Delete | |
| <hr/> | |
| Scan | Ctrl+S |
| Import | Ctrl+I |
| Close Batch | Ctrl+C |
| <hr/> | |
| Select Scanner... | |
| Scanner Preference... | |
| <hr/> | |
| Exit | |

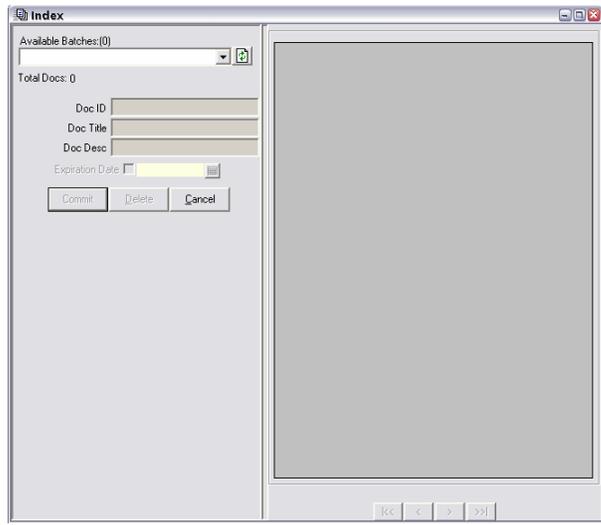
Create Document: creates a new document containing just the current page.

Split: splits the current document starting with the current page and creates a new document

Delete: deletes the current document

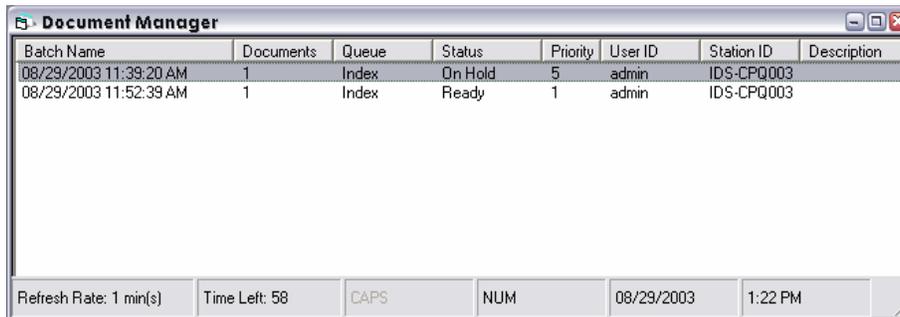
Batch Processing (Index)

The Index function allows the user to Index the documents from the batch process. Select a batch from the Available Batches dropdown. Fill in the desired fields (at least one field must be filled in) and click commit and the document will be saved to the folder that was specified during the Scan/Import function.



Batch Processing (Doc Manager)

The Doc Manager keeps track of current batches in the system. Batches that are shown in the Doc Manager are the batches that have not yet been indexed. Right click on the Doc Manager to see its menu. In Doc Manager you can also change a batches priority and status except for those batches that are put On Hold. If you double click on one of the batches, it will open that batch in the Index screen.



| Batch Name | Documents | Queue | Status | Priority | User ID | Station ID | Description |
|------------------------|-----------|-------|---------|----------|---------|------------|-------------|
| 08/29/2003 11:39:20 AM | 1 | Index | On Hold | 5 | admin | IDS-CPQ003 | |
| 08/29/2003 11:52:39 AM | 1 | Index | Ready | 1 | admin | IDS-CPQ003 | |

Refresh Rate: 1 min(s) Time Left: 58 CAPS NUM 08/29/2003 1:22 PM

Doc Manager Menu

| | |
|------------------------|----|
| Delete | |
| Refresh Rate... | |
| Refresh | F5 |
| Close Document Manager | |

Delete: deletes the current batch.

Refresh Rate: sets the automatic refresh of the document manager

Refresh: manual refresh of the document manager.

DSN Selector

The DSN Selector is located in the directory where Edge 2004™ was installed. It is also in the Start menu under Edge 2004™.

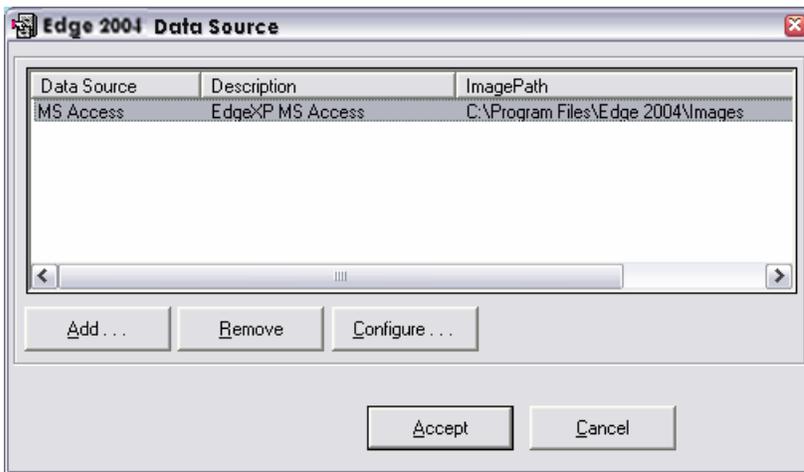
How to Create a DSN for MS Access

Step 1

Select the DSN Selector in the Start menu under Edge 2004™ which brings up the Edge 2004 Data Source Screen.

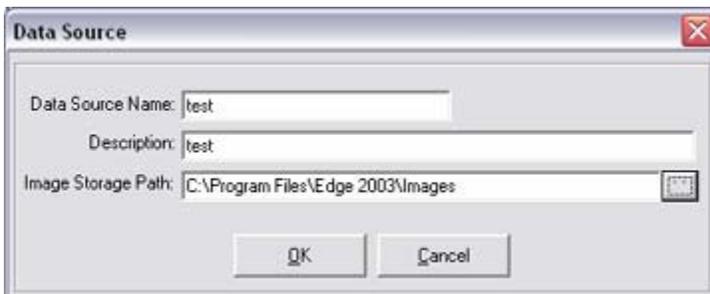
Step 2

In the Data Source Screen select the Add Button which brings up next screen.



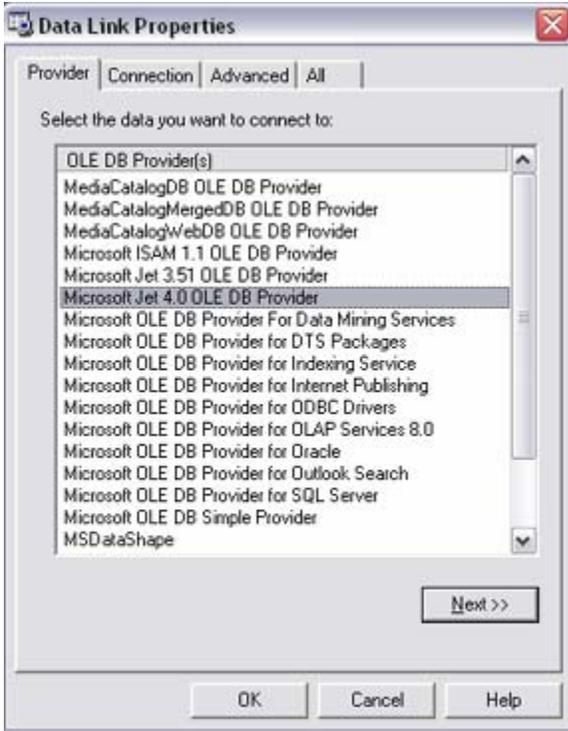
Step 3

In this screen enter your Data Source Name, Description and Image Storage Path and click OK. This brings up Data Link Properties Screen



Step 4

In the Data Link Properties Screen select Microsoft Jet 4.0 OLE DB Providers and click Next for the subsequent screen to come up.



Step 5

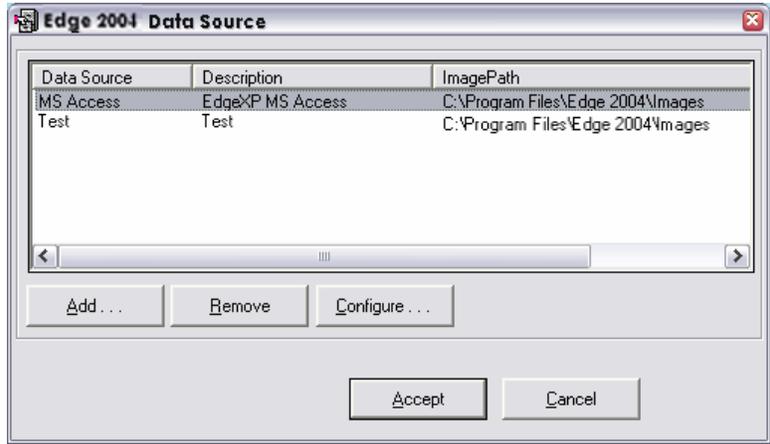
In this screen enter/select the Database name, enter the username and password to log on to the Database selected/entered. Click OK after you enter required fields.



Note: If the 'Use a specific username and password' is chosen, 'Allow saving a password' MUST be checked. The default username is 'edgeuser' and the default password is 'demo'

Step 6

Edge 2004 Data Source screen appears with new Data Source Name, select the required Data Source Name and Click on accept to connect to the corresponding Database.



How to Create DSN for Microsoft SQL Server 2000

Step 1

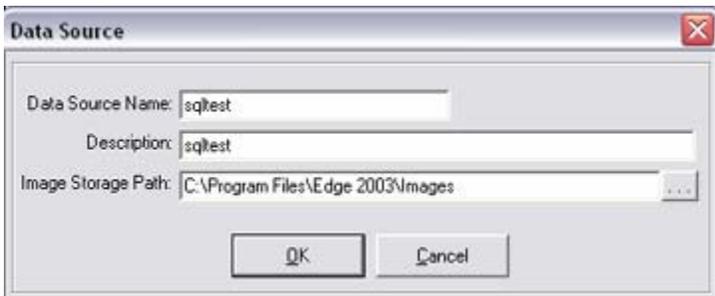
Select the DSN Selector in the Start menu under Edge 2004™ which brings up the Edge 2004 Data Source Screen.

Step 2

In the Data Source Screen select the Add Button which brings up next screen.

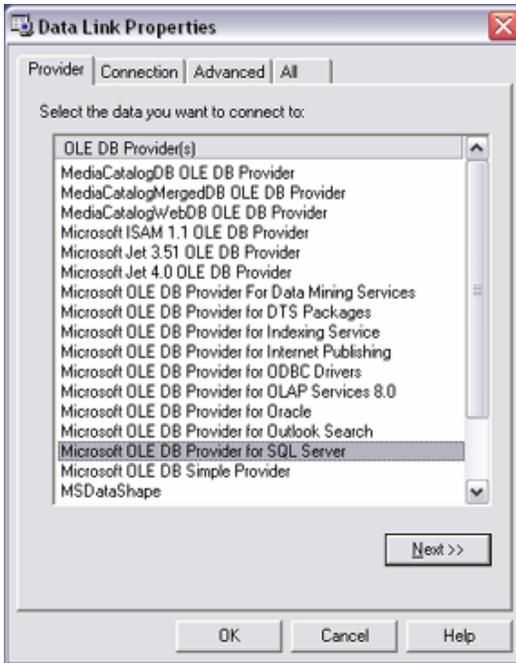
Step 3

In this screen enter your Data Source Name, Description and Image Storage Path and click OK. This brings up Data Link Properties Screen.



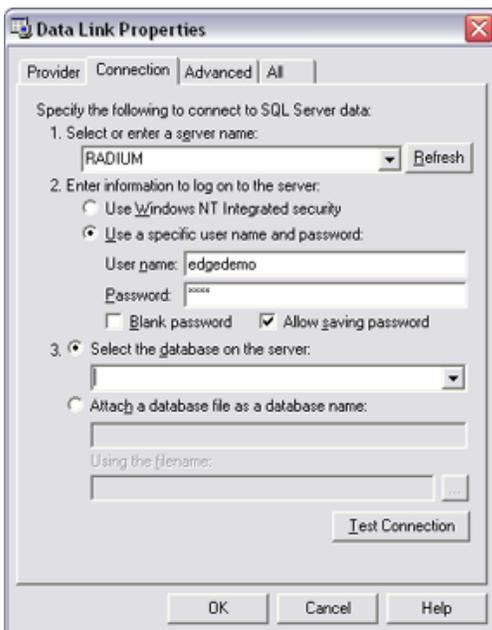
Step 4

In the Data Link Properties Screen select Microsoft OLE DB Provider for SQL Server and click Next for the subsequent screen to come up.



Step 5

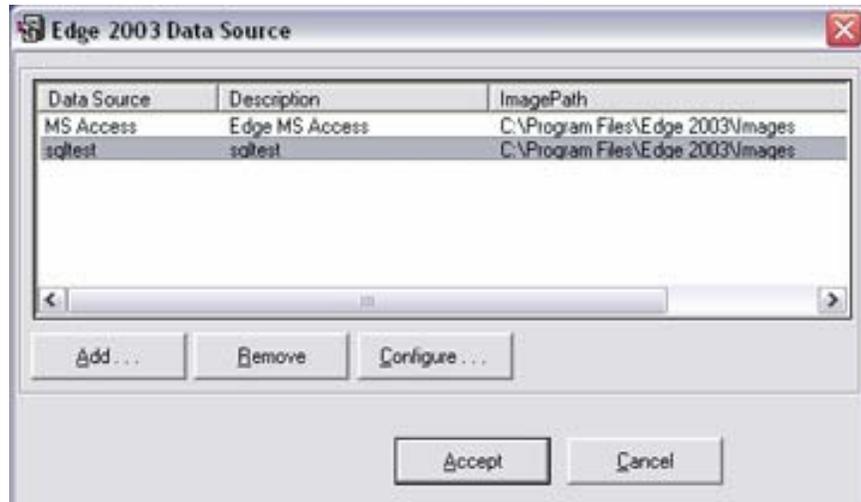
In this screen select/enter a database server name, enter the username & password to log on to the server (Note: Windows NT authenticated Security can also be used instead) and either enter the database name on the server or attach the database file as a database name. Click OK after the required information is entered.



Note: If the 'Use a specific username and password' is chosen, 'Allow saving a password' MUST be checked. The default username is 'edgeuser' and the default password is 'demo'

Step 6

Edge 2004 Data Source screen appears with new Data Source Name, select the required Data Source Name and Click on accept to connect to the corresponding Database.



Upload Files to SharePoint

To upload the folder to SharePoint in the SharePoint , select the Edge folder you want to upload and then drag it to the SharePoint panel displayed above the Edge panel. The interface then prompts you a message box to assign a Title to folder being dragged.



If the Folders that are uploaded to the SharePoint are assigned the same name which already exists in the SharePoint then the following message box is shown.



This message box gives an option to the user to replace all the existing documents in the present folder by the ones that are present in the folder that is currently uploaded with same name.

In the case document being replaced with the one having the same name; the following message box is shown



2004
Edge
Business Management Solution

5

wrap up



Customized Versions

Edge 2004™ was designed by Integrated Digital Systems (“IDSS”), a 14 year veteran in the document imaging market, to be the most cost effective document and process management product available in the market. Edge 2004™ can be used as a middleware application for use with most multi-functional devices, EdgeVault, iManage, Microsoft SharePoint, the Xerox Document Centre and Xerox DocuShare or as an independent system to acquire, process and manage files and documents.

Support & Resources

There are many ways to contact us with any questions you may have regarding our Edge Products Group and Services.

Tech Support: **1-800-283-0999**
support@idsscan.com

Product Information: **1-800-283-0999**
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