exigen

User's Guide

process backbone

Exigen Workflow 5.6

Process Control Services

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Preface

The following topics are described in this section:

- Purpose of this Guide
- Audience
- Related Information
- Typographic Conventions

Purpose of this Guide

This guide describes the main user operations for Exigen Workflow. These operations include the following:

- scanning documents
- indexing and inspecting scanned documents
- working with documents in the Queue node
- saving documents to magnetic or optical media

Each function is described in a separate chapter.

Audience

This guide is intended for Exigen Workflow end users. End users manage documents in a workflow.

It is assumed that the reader has a basic understanding of the Windows® environment.

Related Information

The following table lists guides that provide related information about Exigen Workflow:

Related documentation	
Title	**Description**
Exigen Workflow Administrator's Guide, Part 1: Design and Configuration	Defines the main concepts underlying Exigen Workflow and describes how to get started, create projects, and set up, manage, and monitor the system.

Related documentation	
Title	**Description**
Exigen Workflow Administrator's Guide, Part 2: Business Component Reference	Describes how to configure, maintain, and run Exigen Workflow servers.
Exigen Workflow Administrator's Guide, Part 3: Utilities	Describes how to configure and use Exigen Workflow utilities.
Exigen Workflow Web User's Guide	Describes how to use the Exigen Workflow Internet solution.

Typographic Conventions

The following styles and conventions are used in this guide:

Typographic conventions	
Convention	**Description**
Bold	• Represents user interface items such as check boxes, command buttons, dialog boxes, drop-down list values, field names, menu commands, menus, option buttons, perspectives, tabs, tooltip labels, tree elements, views, and windows. • Represents keys, such as **F9** or **CTRL+A.** • Represents a term the first time it is defined.
`Courier`	Represents file and directory names, code, system messages, and command-line commands.
`Courier Bold`	Represents emphasized text in code.
Select **File > Save As**	Represents a command to perform, such as opening the **File** menu and selecting **Save As.**
Italic	• Represents any information to be entered in a field. • Represents documentation titles.
< >	Represents placeholder values to be substituted with user specific values.
Hyperlink	Represents a hyperlink. Clicking on this field takes you to the identified place in this guide.

Chapter 1: Introduction

This section introduces you to the Exigen Workflow system.

The following topics are described in this section:

- What Is Exigen Workflow?
- Exigen Workflow Users
- Exigen Workflow System Overview
- Exigen Workflow Data Structure
- Exigen Workflow Concepts

What Is Exigen Workflow?

Exigen Workflow is a powerful and flexible Windows-based work management system. Exigen Workflow provides software for workflow, document management, and client-server imaging solutions. Exigen Workflow is a customizable system that enables system administrators to create workflow applications for solving document management problems. End users use these applications to scan, import, view, route, archive, and retrieve documents.

The following Exigen Workflow software components are described in this section:

- Workflow Software
- Document Management
- Document Imaging

Workflow Software

Workflow software provides structured processing and rules that enable you to route imaged and other electronic documents through your organization without additional programming.

Document Management

Document management software provides indexing, handling, storage, and retrieval of imaged and other electronic documents.

Document Imaging

Document imaging software converts paper documents into computerized document images. These document images are viewed and edited as needed.

Scanning converts paper documents, including text, illustrations, and photos, into computer document images. Any document can be scanned into a computer and filed, distributed, or processed. Scanned images can also be printed or faxed.

Exigen Workflow assigns field values to parcels and document images and applies barcode values to document images. Routing rules and events allow you to send document images to other users via email. Once document images are indexed, the documents can be accessed by many users, eliminating the need for photocopying and interoffice mail.

Exigen Workflow provides security against inappropriate or unauthorized use, improves customer service, increases productivity, and cuts operating costs.

Exigen Workflow Users

The following Exigen Workflow user types are described in this section:

- System Administrators
- End Users

System Administrators

System administrators configure and manage the Exigen Workflow system. The following table describes the main setup tasks of the system administrators:

System administrators	
Setup tasks	**Description**
Set up user profiles	Establishes permissions and access for end users based on their role within the company.
Customize fields and tables	Custom fields and tables are added to the system and used for indexing and as reference material. Custom tables are used as references to certain fields, thereby ensuring that data is entered correctly.
Rule-based routing	Using both system and custom fields, rule-based routing guarantees that documents are sent to the correct recipients for handling.
Set up tables and workflow	Includes setting up and maintaining the workflow and tables.

End Users

End users process documents routed to them with Exigen Workflow. The workflow defines who they can send mail to and who they can receive mail from. Users access specific workflow objects based on their individual user profiles. For example, some users may have access to the Statistical Information Utility, or to the Exigen Workflow Monitor, which allows a parcel to be moved from one queue or user to another.

Exigen Workflow System Overview

Exigen Workflow is a customizable system that enables system administrators to create workflow applications for solving document management problems. End users work with these applications to scan, import, view, route, archive, and retrieve documents as seen in the following diagram.

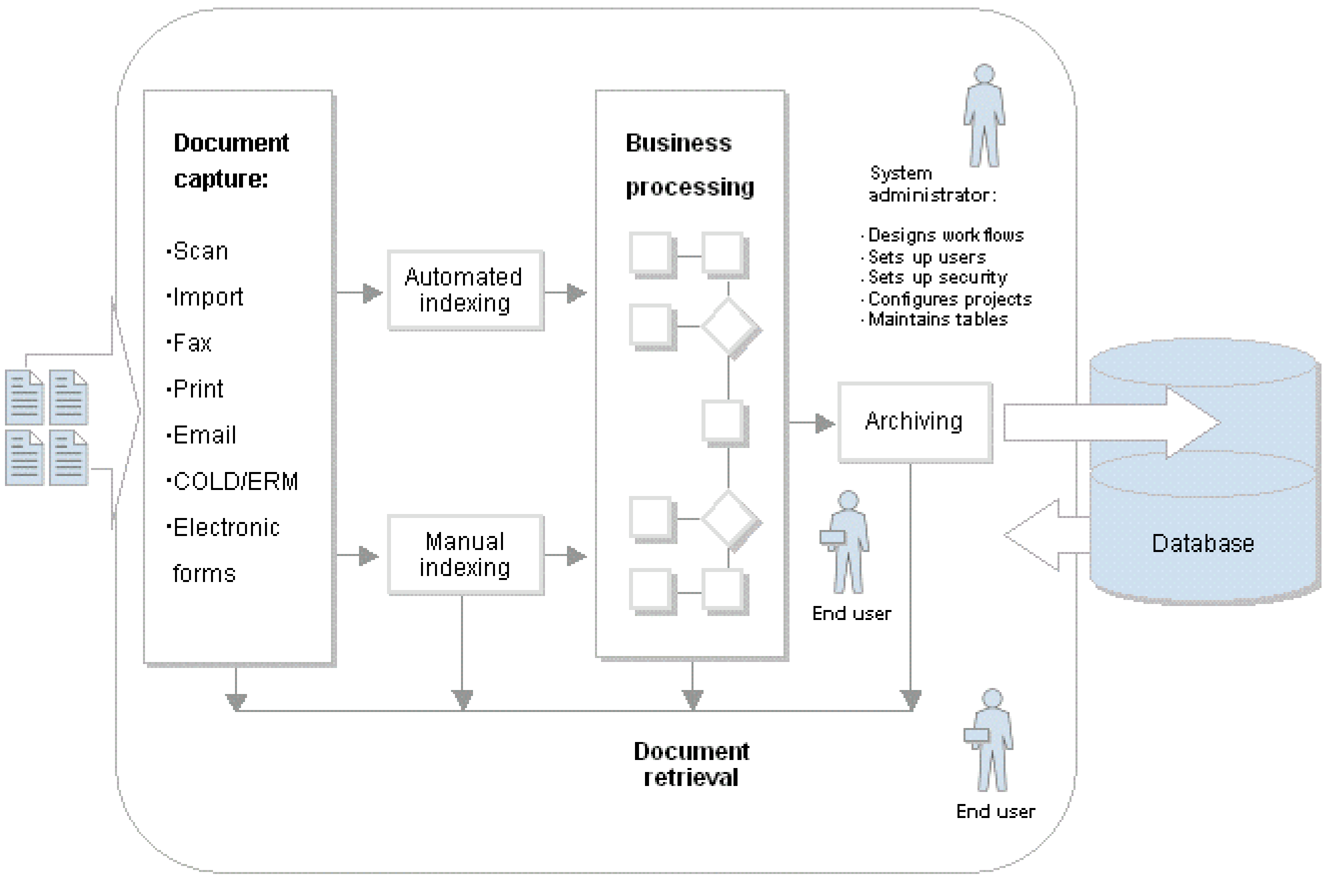


Figure 1: Exigen Workflow system

Exigen Workflow Data Structure

The following data structure topics are described in this section:

- Folder, Parcel, and Document Associations
- Understanding Folders and Subfolders
- Understanding Parcels

Folder, Parcel, and Document Associations

Exigen Workflow works with folders, parcels, and documents. Documents are the most basic objects; they are created either by scanning paper documents or by using applications such as Word or Notepad.

Exigen Workflow allows you to store different types of documents in one folder. For example, one folder can have a scanned invoice, a word-processed letter, a spreadsheet file, and a received fax file.

Document types classify documents and provide document security.

A number system is used to track batches, parcels, documents, and folders in Exigen Workflow.

During the scanning process, a **batch number** and **document number** are assigned to the batch and document being scanned. When a batch of documents is scanned into the system, a parcel is created for each document and given a **parcel number.** To ensure that the parcel is assigned to a certain folder, the parcel number and the document numbers in that parcel are associated with the folder number.

During indexing, parcels and documents are assigned to a folder. Each folder has a unique **folder number.** To ensure that the parcel is assigned to a specific folder, the parcel number and document numbers are associated with the folder number.

The following table shows the number structure in Exigen Workflow:

Number structure		
Folder table	**Parcel table**	**Document table**
Folder number	Parcel number	Document number
	Folder number	Parcel number
		Folder number

Understanding Folders and Subfolders

Exigen Workflow uses **folders** to store related documents. **Subfolders** represent different sections within a folder. Individual documents are stored in the subfolders.

The following table illustrates how the Exigen Workflow folder, subfolder, document structure is similar to a file cabinet.

Folder and subfolder structure	
In Exigen Workflow	**In your file cabinet**
Documents	Paper documents
Subfolders	Manila folders
Folders	Hanging folders

By assigning identification values at the folder, subfolder, and document level, you can organize your electronic file cabinet using the same concepts as the one in your office.

Folders are added dynamically from within the Exigen Workflow indexing application. The assignment of unique index fields prohibits the addition of duplicate folders.

Subfolders are added dynamically or assigned using predefined values. The system administrator configures the indexing system, which determines how subfolders are assigned to documents.

Understanding Parcels

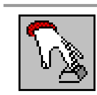
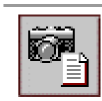
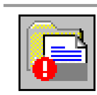
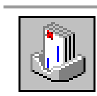
The Exigen Workflow system uses **parcels** to move documents through the workflow. Parcels act as containers for the documents. A parcel contains one or more documents, and each document must be assigned to a parcel to be routed through the workflow. Exigen Workflow assigns a unique parcel ID number to each parcel. This number is also inserted into the document record of each document contained in the parcel.

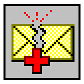
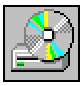
During indexing, a parcel is assigned to a specific folder; subsequently, all documents assigned to that parcel are also indexed to the same folder. If the parcel contains a document that must be indexed to a different folder, the document must be placed in a separate parcel using the available queue tools.

Exigen Workflow Concepts

Exigen Workflow contains a number of basic functions that are represented on the workflow map as icons and are called **workflow objects.**

The following workflow objects are available in Exigen Workflow:

Workflow objects		
Button	**Object**	**Definition**
	High Volume Scan	Uses a scanner to convert paper documents into computer images. Multiple pages are scanned into the system as a batch, which can be separated into individual documents. In contrast to Low Volume Scan, which scans and indexes documents, High Volume Scan is used for scanning only.
	High Volume Index	Assigns each scanned document to a folder or subfolder. This process groups the related documents into subfolders, and related subfolders into folders. During indexing, Exigen Workflow automatically assigns a unique ID to each document.
	Low Volume Scan	Combines the operations of High Volume Scanning and High Volume Indexing to process small quantities of documents.
	Inspect	Quality assurance process. Inspection determines whether a scanned image meets quality standards or if it must be rescanned or repaired. Automated checks and inspections can be performed on scanned documents for quality assurance.
	Queue	Allows you to incorporate a word processor, spreadsheet or other external applications into the workflow process. The tasks performed in conjunction with the document image are daily

Workflow objects		
Button	**Object**	**Definition**
		duties that are performed in the Queue workflow object.
	Retrieve	Allows users to retrieve folders or documents from permanent storage. Users can browse, edit, or print retrieved documents. Full text search (FTS) retrieval can be used to search for specific words or phrases within the documents.
	Work Item Submitter	Creates a parcel of referenced documents that is sent to the next node in the workflow. It also has the same functionality as the Retrieve object.
	Commit	Saves documents on a predefined storage medium, such as an optical disk. The Commit configuration specifies the location and size of the storage media and the documents to be sent to storage.

Exigen Workflow servers are described in the *Exigen Workflow Administrator's Guide*, *Part 2: Business Component Reference*.

Chapter 2: Getting Started

The following topics are described in this section:

- Starting Exigen Workflow
- Exiting Exigen Workflow
- Viewing Applications and Workflow Objects in the Exigen Workflow Explorer Window
- Security Restrictions on Operations with Documents, Folders, Subfolders, and Parcels

Starting Exigen Workflow

Windows must be running on your computer for Exigen Workflow to work.

Exigen Workflow Explorer must be open to access Exigen Workflow objects.

Exigen Workflow Explorer appears in Windows Explorer format. All workflow applications and queues to which you have access are available in Exigen Workflow Explorer.

To open Exigen Workflow Explorer, proceed as follows:

1. Select **Start > Programs > Exigen Solution > Exigen Workflow > Exigen Workflow Explorer.**

   The **Welcome to Exigen Workflow** window appears.

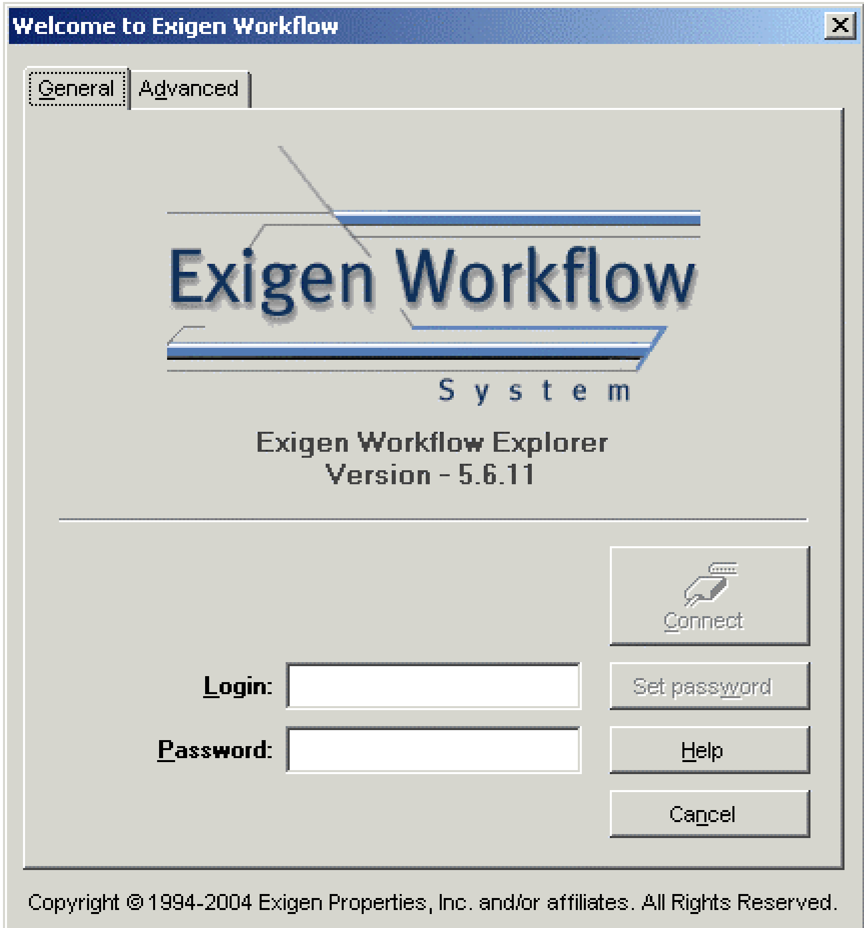


Figure 2: Welcome to Exigen Workflow window

2. In the **General** tab, in the **Login** field, enter the login ID provided by your system administrator.

   The login defaults to capital letters.

3. In the **Password** field, enter your password.

   Connect is enabled.

4. To complete the login process, click **Connect.**

To change your password, proceed as follows:

1. Click **Set Password.**

   The **Change password** window appears.

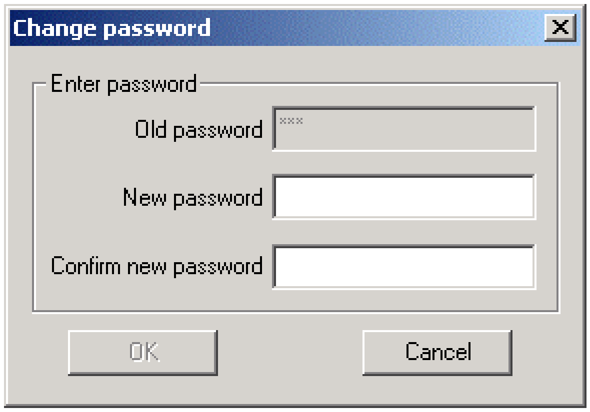


Figure 3: Change password window

2. In the **New password** and **Confirm new password** fields, enter the new password.
3. To save the new password, click **OK.**

To log into another server, proceed as follows:

1. Select the **Advanced** tab of the **Welcome to Exigen Workflow** window.

   The **Advanced** tab appears.

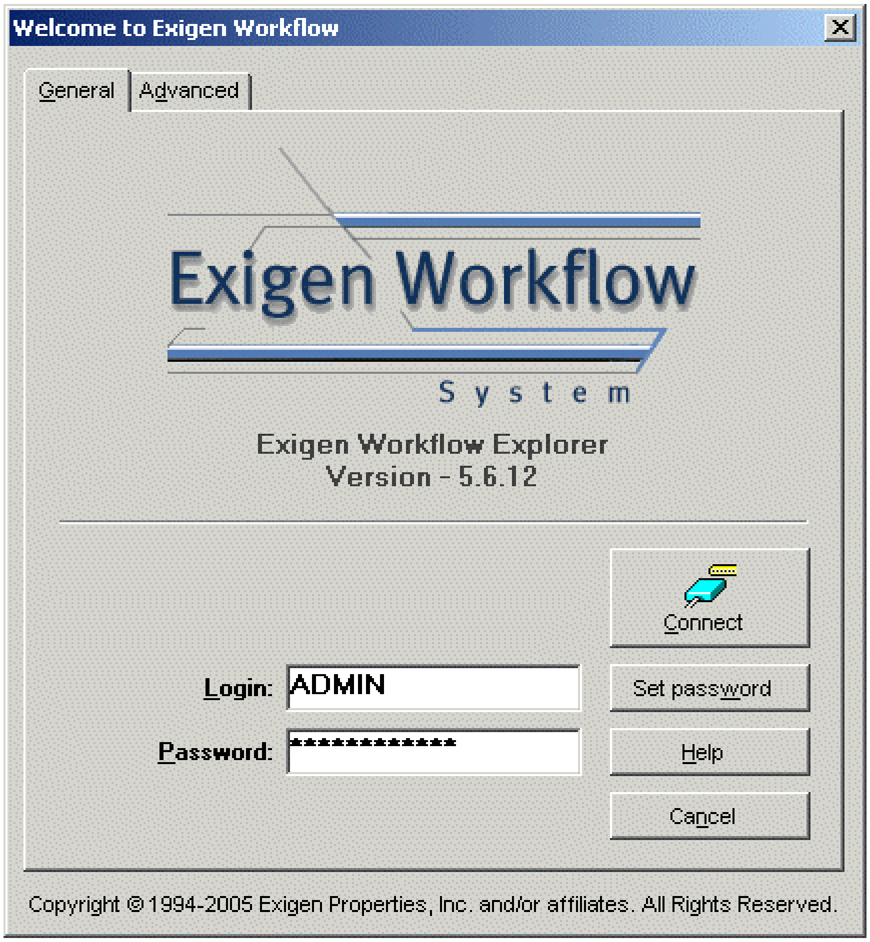


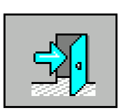
Figure 4: Exigen Workflow login dialog with Advanced tab

2. In the **Server** list box, select a server.
3. Enter a login name and password for the server.
4. To complete the login process, click **Connect.**

   You can be logged into multiple servers at one time.

Exiting Exigen Workflow

To exit Exigen Workflow, click **Exit.**



Viewing Applications and Workflow Objects in the Exigen Workflow Explorer Window

The **Exigen Workflow Explorer** window allows you to view all applications and workflow objects to which you have access, regardless of project ID or workflow application. The applications and workflow objects are part of the **My Desktop** function.

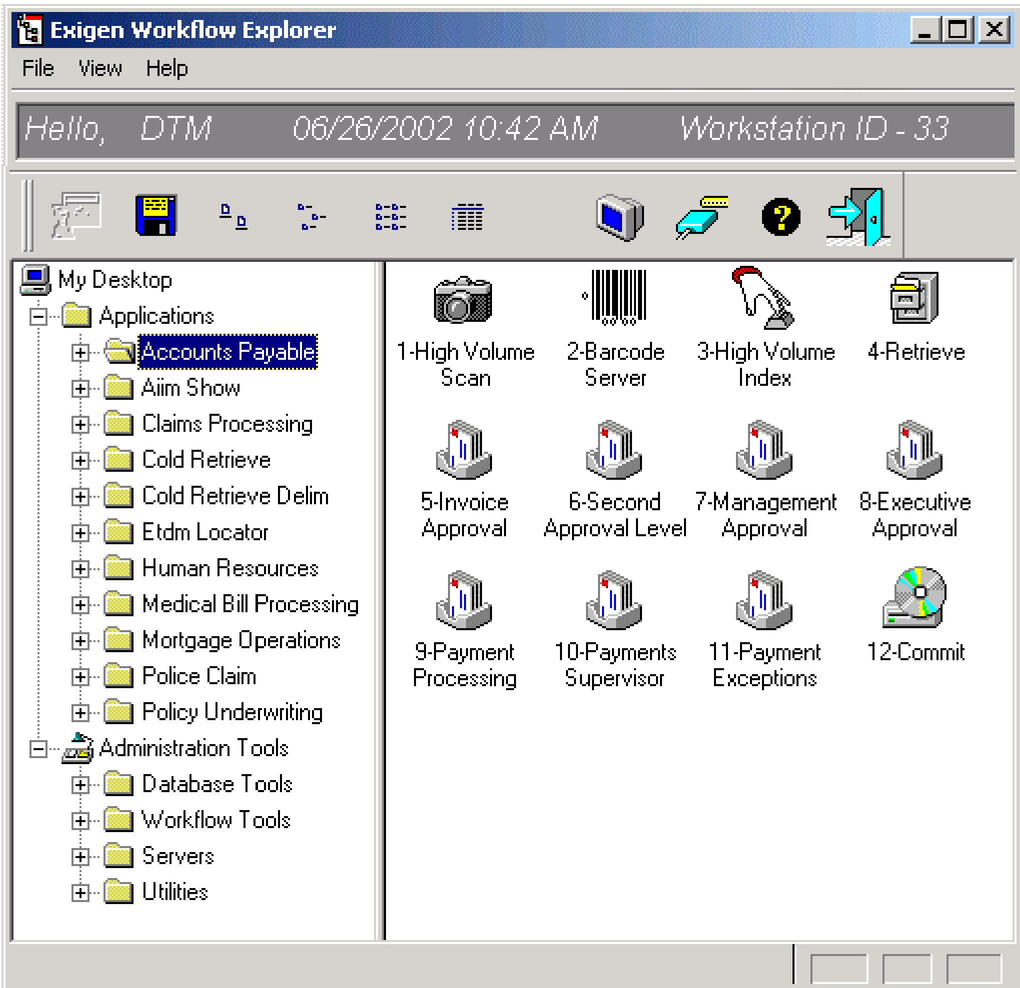


Figure 5: Exigen Workflow Explorer window

The **Applications Folder** contains folders that represent different workflow applications.

To open a workflow application, double-click on its folder name. The right side of the window shows the workflow icons or a list of the workflow objects, depending on the view mode.

The **Administration Tools Folder** contains folders that represent the tools and utilities to which you have access.

The following table describes the folders assigned to the Administration Tools folder:

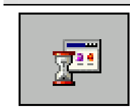
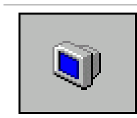
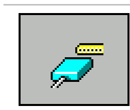
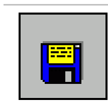
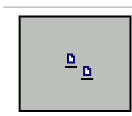
Administration tools folder content	
Folder name	**Description**
Database Tools	Applications used by the system administrator to design and maintain Exigen Workflow projects and databases.
Workflow Tools	Applications used to create and maintain workflow applications, monitor and analyze jobs in the workflow, maintain user profiles, and monitor login activity within the system.
Servers	Applications used for printing from the print queues.
Utilities	Utilities are applications used to maintain and manage additional administrative aspects of the Exigen Workflow system.

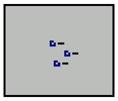
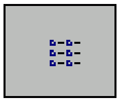
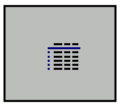
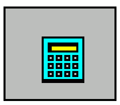
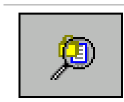
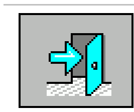
To open a folder, double-click on the folder, or click the **+** sign to the left.

To open a workflow object or application, double-click on the object icon, or highlight the object icon and click **Open.**

Exigen Workflow Explorer Buttons and Menu Bars

The Exigen Workflow Explorer button and menu bars contain the following functions:

Exigen Workflow Explorer functions			
Button	**Menu option**	**Shortcut key**	**Description**
	**File > Open Application**	**F10**	Opens the selected workflow object or utility.
	**File > Workstation Setup**	**F3**	Sets up workstation specific attributes, such as settings for email and new parcel notifications.
	**File > Login as a Different User**	**F4**	Allows the user to log into another user’s desktop without closing and restarting the Exigen Workflow login window.
	**File > Save Configuration**		Saves the size and position of the **Exigen Workflow Explorer** window as default settings.
	View > Info pane		Displays the information pane, which includes the user name, date, and workstation number.
	View > Toolbar		Displays the toolbars across the top of the window. Clear this option to hide the toolbars.
	View > Status Bar		Displays the status bar across the bottom of the window. Clear this option to hide the status bar.
	**View > Large Icons**		Displays the workflow objects as large icons on the right side of the window.

Exigen Workflow Explorer functions			
Button	**Menu option**	**Shortcut key**	**Description**
	**View > Small Icons**		Displays the workflow objects and applications as small icons on the right side of the window.
	**View > List**		Lists the workflow object and application names on the right side of the window.
	**View > Details**		Lists the details of the workflow object, application names, and files on the right side of the window.
	View > Collapse		Collapses all folders on the left side of the window.
	View > Expand		Expands all folders on the left side of the window.
	**View > Calculate Jobs**		Calculates the number of jobs in the selected workflow object. When selected, the display changes to **Details.**
	**View > Show Locked Documents**		Displays window with a list of documents that are checked out for editing in the selected workflow node.
	View > Refresh	**F5**	Refreshes the Exigen Workflow Explorer application to display program changes and updates to the number of jobs that appear in each queue.
	Help > Help Topics	**CTRL+F1**	Displays a list of available help topics.
	**Help > Context Help**	**F1**	Displays context help.
	Help > About Exigen Workflow		Displays Exigen Workflow copyright and release information.
	**File > Exit**	**F12**	Closes the Exigen Workflow Explorer application.

Security Restrictions on Operations with Documents, Folders, Subfolders, and Parcels

Exigen Workflow security settings affect the operations that users can perform on documents, folders, subfolders, and parcels.

For more information on security mechanisms, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration*, Chapter 3: Creating Projects, Exigen Workflow Security.

For more information on required permissions for specific tasks, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration*, Appendix H: How ACL Based Security Affects Documents, Folders, and Subfolders.

Chapter 3: High Volume Scanning

This section describes how to use the High Volume Scan workflow object to convert paper documents into computer document images. It also describes how to work with the document images once they are in the High Volume Scan queue.

The following topics are described in this section:

- Overview
- High Volume Scanning Basics
- Working with Batches and Documents

Overview

The following diagram shows a basic workflow process.

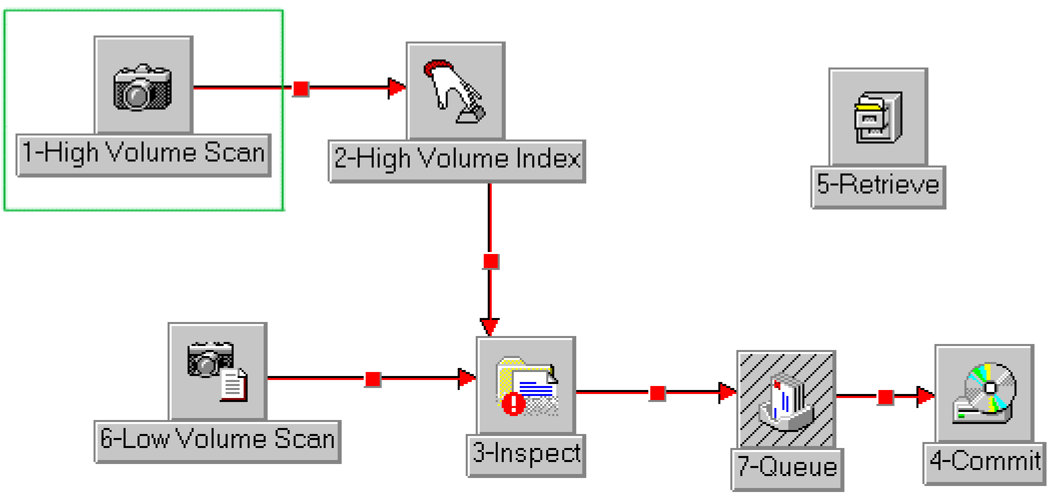


Figure 6: Basic workflow diagram

This chapter describes the High Volume Scan object. Other workflow objects shown on this diagram are described in the following chapters.

The High Volume Scan workflow object and a scanner with an automatic document feeder (ADF) save time when converting large quantities of paper documents into computer document images.

High Volume Scanning Basics

The following topics are described in this section:

High Volume Scanning

The following topics are described in this section:

Preparing to Scan Documents

Perform the following preliminary steps before scanning documents:

1. Set up the scanner as follows:
   - Configure the scanner.
   - Adjust the scanner settings.
   - Select a scan engine.

   For information on scanner configuration settings, see the system administrator or scanning documentation.

2. Remove all paper clips and staples from the documents.
3. Turn on the scanner.
4. Assemble the pages into documents.

Note: A batch is a group of documents that are scanned into the Exigen Workflow system at the same time. A document may consist of one or more pages.

5. Assemble documents into batches.
6. Place the documents in the ADF.

Scanning Documents Using High Volume Scanning

1. In Exigen Workflow Explorer, double-click **High Volume Scan.**

   The **High Volume Scan** window appears. For information on the **High Volume Scan** window, see High Volume Scan Window.

2. In the **High Volume Scan** window, select **Scan > Select Scan Engine.**

   The **Select Scan Engine** window appears.

3. Select a scan engine and click **Apply.**
4. In the **High Volume Scan** window, click **Scan Batch.**

The **Scan Dialog** appears on the left, and the Image Viewer on the right. For information on the **Scan Dialog,** see Scan Dialog Window. For information on the Image Viewer, see Chapter 11: Image Viewer.

5. In the **Scan Dialog,** adjust the scanner settings.
6. Place the pages of your documents in the ADF.
7. Click **Scan.**

   If the ADF runs out of paper, a warning appears.

8. If you want to continue scanning pages into the current document, click **Yes.**
9. If you want to start scanning a new document or close the current batch, click **No.**

   For information on document scanning, see Scanning Documents.

10. When document scanning is complete, click **Close Batch**, or press **F12.**

    The **Parcel Info** dialog box appears.

11. Enter a description for the batch and give it a priority setting.
12. If you want to keep the batch in the High Volume Scan queue, click **Save.**
13. If you want to send the batch to the next queue in the workflow, click **Send.**

    The **Send Manager** dialog opens. For information on the **Send Manager** dialog, see Sending a Batch from the High Volume Scan Queue Using Send Manager.

14. Specify a queue and user for the batch.

    Send Manager can also be used to give the batch a priority setting and a description.

High Volume Scan Window

The **High Volume Scan** window contains features required for high-volume scanning.

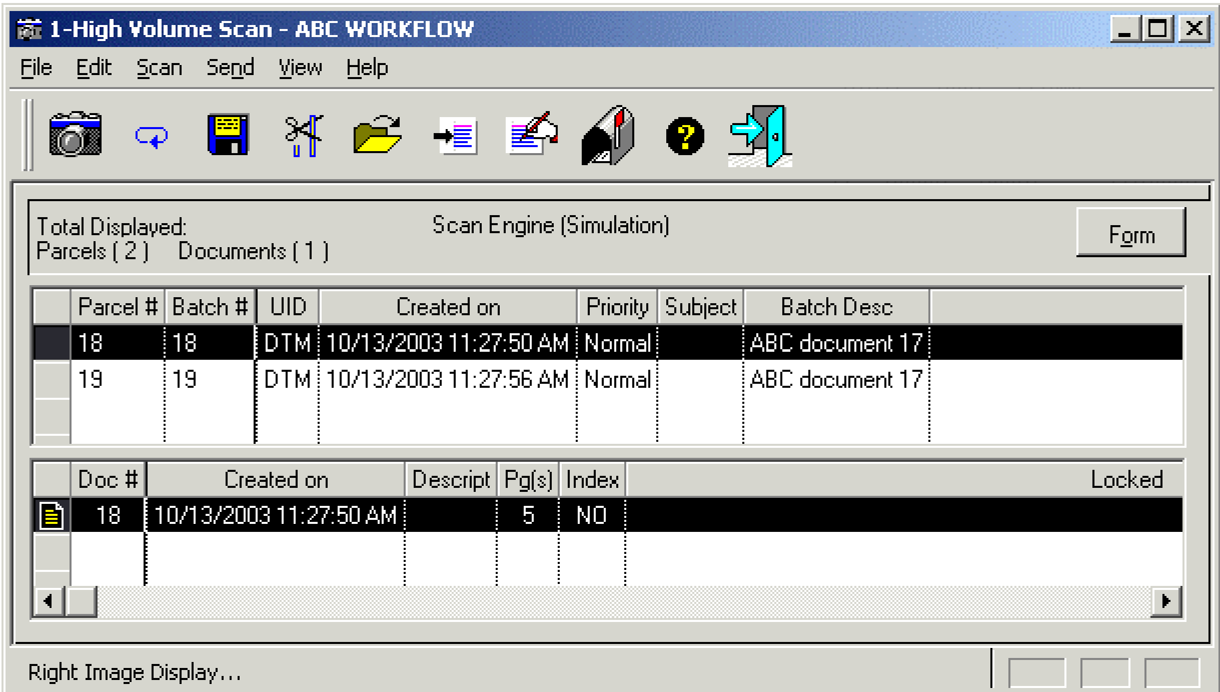


Figure 7: High Volume Scan window

The **High Volume Scan** window consists of the following sections:

High Volume Scan	
Name	**Description**
Menus	Contains functions for the scanning queue. For information on menus, see Appendix A: Exigen Workflow Menus and Buttons.
Button bar	Contains utilities for the scanning queue. For information on buttons, see Appendix A: Exigen Workflow Menus and Buttons.
Information line	Displays the number of batches or parcels currently present in the queue, the number of documents within the selected batches, and the Scan Engine being used.
Batch table	Lists all batches in the queue.
Document table	Lists all documents assigned to the selected batch.

The middle portion of the window lists the batches. The lower portion of the window lists documents within the selected batches. Documents displaying a **Y** in the **Locked** column are checked out for editing. The column headings in each portion differ based on system configuration and can include custom fields.

Scan Dialog Window

The following topics are described in this section:

- Scan/Modify Tab
- Settings Tab
- Imprint Tab

The **Scan Dialog** window is used to adjust scanner settings and to start the scanning process.

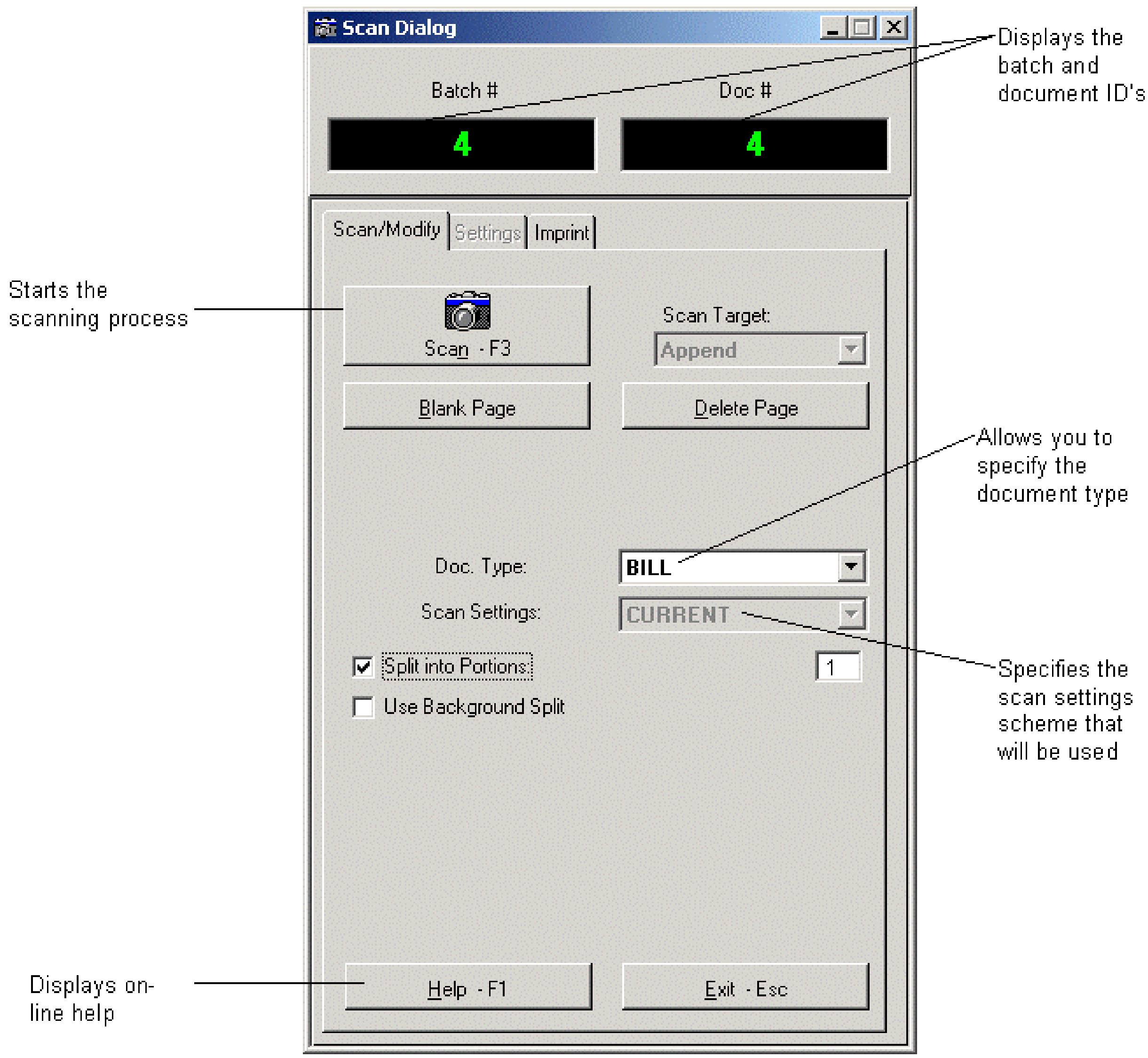


Figure 8: Scan Dialog

The top of the **Scan Dialog** window displays the current batch and document numbers. These numbers are assigned by the system and cannot be changed. Each time a new batch is started, the batch number increases. Each time a new document is scanned, the document number increases. If smaller documents are created from larger ones, each new smaller document is assigned a higher document number.

Scan/Modify Tab

The **Scan/Modify** tab has the following options:

Scan/Modify tab options	
Option or button	**Description**
Scan	Starts the scanning process. For information on document scanning, see Scanning Documents.
Blank Page	Inserts a blank page in the scanned document.
Delete Page	Deletes the page currently opened in Image Viewer.
Doc. Type	Selects the appropriate document type for your batch.
Scan Settings	Selects the appropriate scan settings. * symbol before the setting means that the configuration is common and available for all users.
Split by Portions	Creates in a batch documents that have the same number of pages. Enter the number of pages for each portion in the field on the right. The split occurs after you close the batch and before the batch is sent to the next queue.
Use Background Split	Assigns electronic barcodes to document images. Barcode Server must be set to recognize the alpha string SEPARATOR. This option is used for document images that have a predetermined number of pages. For example, documents that are split by portions. To see the effect of a background split, in the Image Viewer, select **Barcode > Document Info.**
Routing Info	Appears in the **Scan/Modify** tab if the batch status option is defined for a project. The list contains all predefined batch status values. When a batch is scanned, select one of the batch status values.

The **Scan Target** option specifies where the new scanned pages are deployed in the document. The following options are available:

Scan Target	
Function	**Description**
Append	Places the new page at the end of the document.
After	Inserts a new page after the selected page.
Before	Places a new page before the selected page.
Replace	Replaces the selected page.

Settings Tab

The **Settings** tab is used to adjust scanner settings.

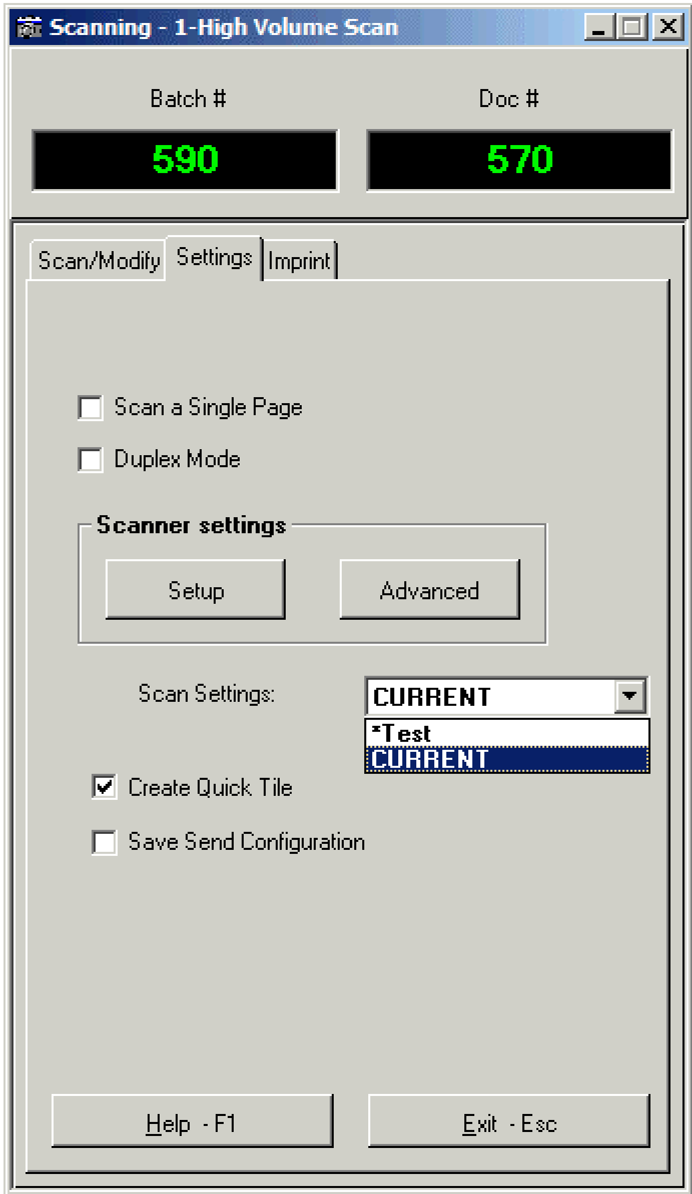


Figure 9: Scan Dialog with Settings tab

The **Settings** tab has the following options:

Settings tab options	
Option	**Description**
Scan Single Page	Bypasses the ADF feature so you can feed pages into the scanner one page at a time. This feature is not recommended for large documents and batches because Exigen Workflow asks you after each page whether or not you want to continue scanning.
Duplex Mode	Simulates double-sided scanning on a single-sided scanner. To use this option, scan one side of all the pages in a batch, turn the pages over and scan the other side. Exigen Workflow places the imaged pages in the correct order.
Create Quick	Bypasses the need to display document images in a tiled view in the Image

Settings tab options	
Option	**Description**
Tile	Viewer. This option increases scanning speed, but it is not recommended if you must use tiled views later.
Save Send Configuration	Automatically sends batches to the same specified queue and user when you click **Close Batch,** or **F12.** This option does not allow you to change either the batch description or priority setting.
Setup	Defines scanner operation. Settings include the following: • using an ADF • document image resolution and brightness • paper size and paper orientation such as portrait or landscape You can also specify Advanced settings such as deskewing, eliminating black borders, and other image enhancing functions.
Scan Settings	Defines more than one configuration at a time. For example, some documents may need to be scanned with a higher quality. Set the higher resolution setting to 300 DPI. The **High Quality** setting appears in the **Scan Settings** box. To delete the specified setting, right-click it. * symbol before the setting means that the configuration is common and available for all users.

Imprint Tab

The **Imprint** tab is used to place an electronic imprint on each page of a document image. The default location of the imprint is the top, left-hand corner of the document image.

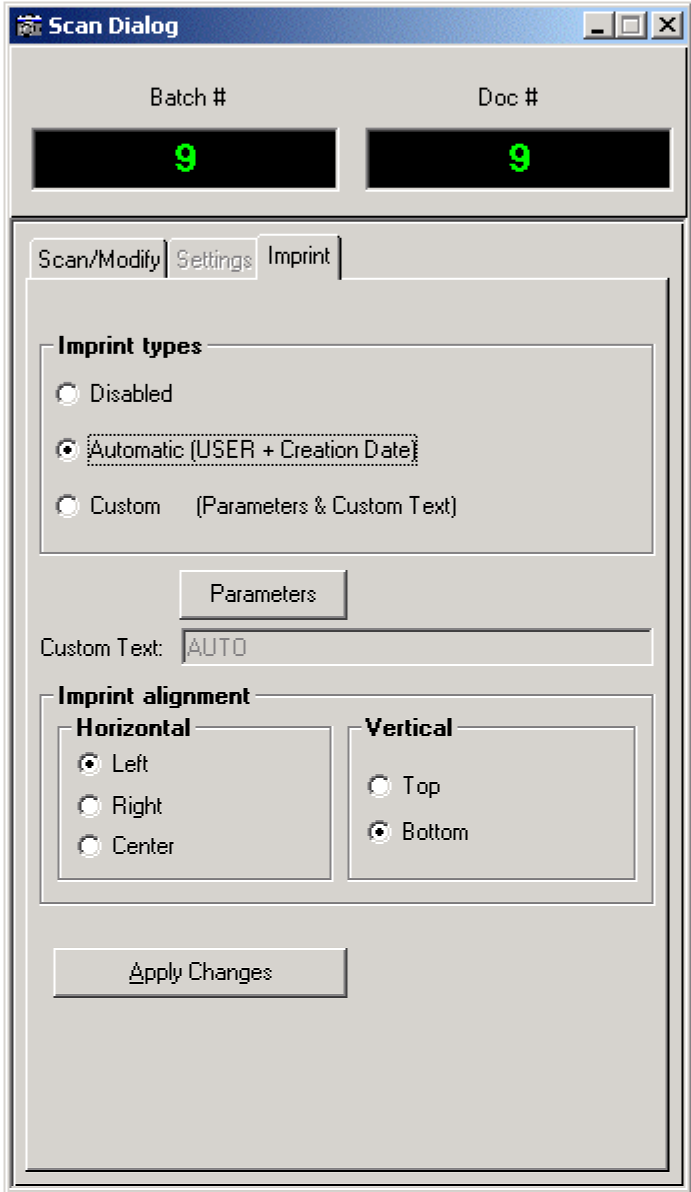


Figure 10: Scan dialog with Imprint tab

Specifying Imprint Settings

To specify imprint settings, proceed as follows:

1. To access settings for imprint type and alignment, select the **Imprint** tab.

   Three options are available for setting the type:

Imprint type options	
Option	**Description**
Disabled	Deactivates the Imprint feature.
Automatic	Stamps a user name and current date on each page of the document image.
Custom	Stamps a custom text that can contain different parameters on each page of the document image.

2. To access the parameter list, in the **Imprint Types** box, select **Custom** and click **Parameters.**

   The **Parameters for Imprint** window appears.

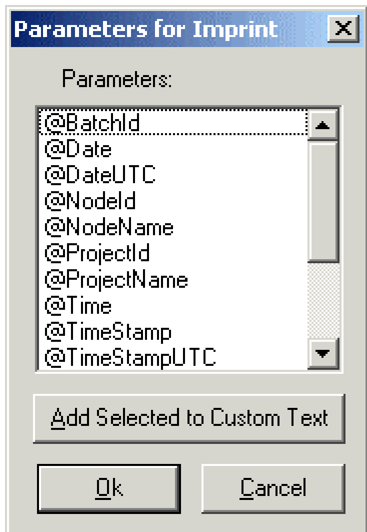


Figure 11: Parameters for imprint window

3. Select the desired parameter and click **Add Selected to Custom Text.**
4. Repeat this step for every parameter to appear on the scanned pages.

   The selected parameters appear in the **Custom Text** field. You can also enter parameters in the **Custom Text** field manually.

   The following imprint parameters are available:

Parameters for imprint	
Parameter	**Description**
@BatchId	Current batch identifier.
@Date	Date relative to local time.
@DateUTC	Date relative to Greenwich Mean Time.
@NodeId	Current node identifier.
@NodeName	Current node name.
@ProjectId	Project identifier.

Parameters for imprint	
Parameter	**Description**
@ProjectName	Project name.
@Time	Local time.
@TimeStamp	Date and local time.
@TimeStampUTC	Greenwich Mean Time and relative date.
@TimeUTC	Greenwich Mean Time.
@UserId	Current user identifier.
@UserName	Current user name.
@WorkflowId	Workflow identifier.
@WorkflowName	Workflow name.
@WorkstationName	Current user's workstation name.

5. After you have added all required parameters, to exit, click **OK.**

   Custom Text can be up to 60 characters long.

   The following horizontal and vertical alignment options are available:

Horizontal alignment options	
Option	**Description**
Left	Positions the imprint on the left.
Right	Positions the imprint on the right.
Centered	Centers the imprint.
Vertical alignment options	
Option	**Description**
Top	Positions the imprint on top.
Bottom	Positions the imprint on the bottom.

6. To save the imprint value, click **Apply Changes.**

   Note that this value is not assigned as a part of the Scan Setup and applies to all images, regardless of the settings.

7. After the **Settings** and **Imprint** tabs are configured, begin scanning.

Scanning Documents

1. In the **Scan Dialog,** in the **Scan Settings** list box, select the appropriate scan setting.
2. In the appropriate list box, select a document type.

   The same document type is assigned to each document in the batch.

3. To create multiple documents containing the same number of pages within a batch, select the **Split by Portions** box.

A new field for page numbers appears to the right. The **Use Background Split** check box appears beneath the **Split by Portions** box.

4. Enter the number of pages.
5. Once the documents are in the ADF, click **Scan** or press **F3.**

   The ADF begins feeding pages into the scanner. As each page is scanned, it is displayed in the Image Viewer on the right side of the window. This allows the scan operator to view each image to ensure that the proper image enhancement settings are used.

   Once all pages in the batch are scanned, Exigen Workflow displays a warning indicating the peripheral is out of paper.

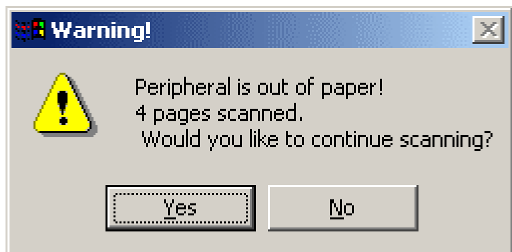


Figure 12: Scanning warning dialog

6. To continue scanning, click **Yes.**
7. To continue scanning pages into the same batch and document, click **No.**

   Scan changes to **Continue.**

8. To continue scanning pages into the same batch and document, click **Continue.**
9. To create a new document within the same batch, click **Next Doc** or press **F7.**

   Regardless of which selection is made, the scanner begins and a warning appears when all the pages are scanned.

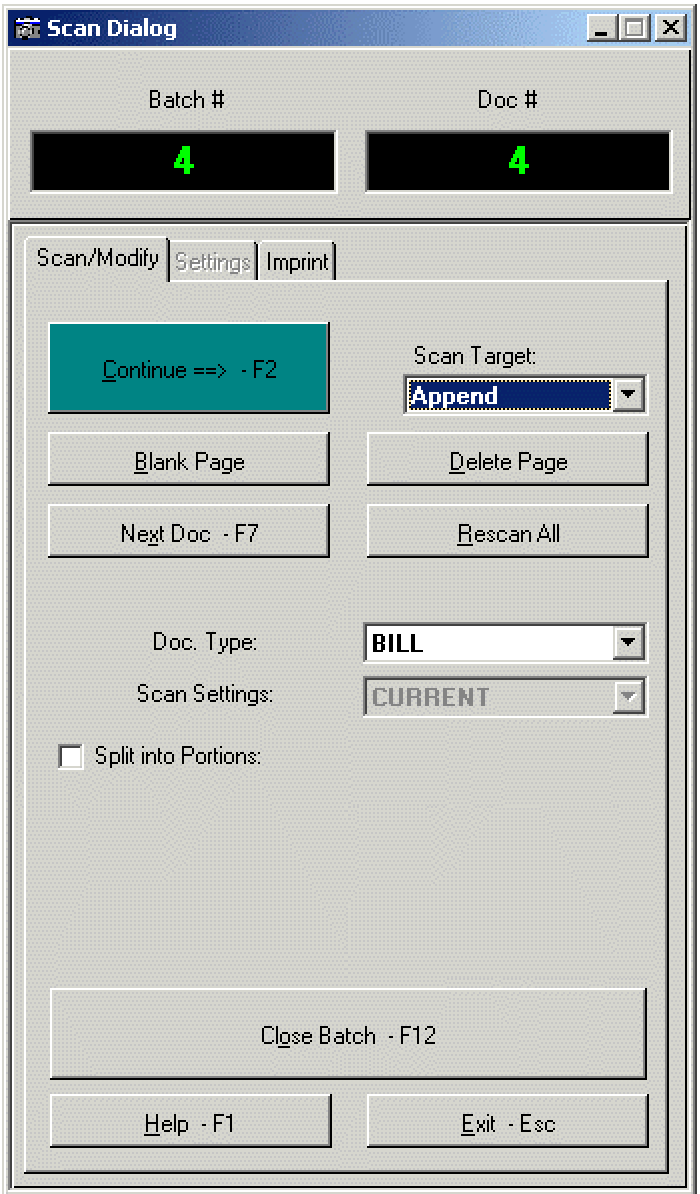


Figure 13: Scanning dialog with Continue scanning

10. To rescan the batch but retain the batch and document numbers, place the paper back into the scanner and click **Rescan All.**

    This deletes the first set of scanned images and replaces them with a new set. This step is performed if image quality must be enhanced or if the proper scan setting was not selected.

11. To close the batch, click **Close Batch,** or press **F12.**

    The **Parcel Info** dialog appears. For information on batches, see Entering Batch Information.

12. To exit the **Scan Dialog** window, click **Exit** or press **Esc,** and confirm that you want to exit when prompted.

If the current batch is not closed, Exigen Workflow advises you to close it.

13. To exit the scanning process, click **Yes.**
14. To remain in scanning mode, click **No.**

Note: Depending on the definitions in the BATCHPARCEL table, the **Scan Dialog** can have additional fields that allow you to enter the number of parcels and documents to be scanned. These additional fields can also show the parcel and document count.

Entering Batch Information

The **Parcel Info** dialog appears after the batch of documents is completely scanned.

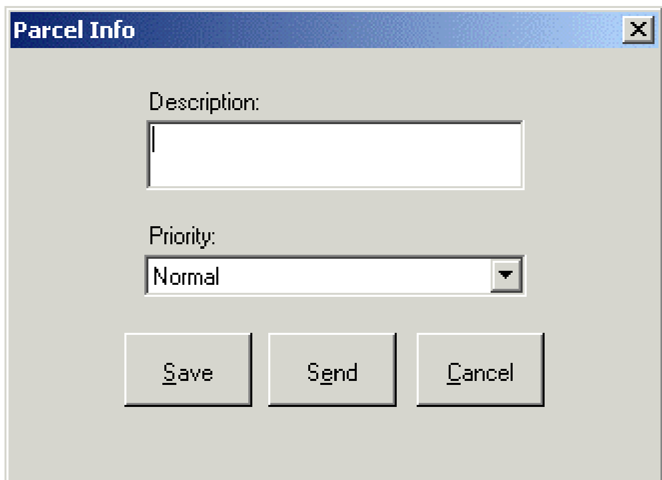


Figure 14: Parcel Info dialog

Note: If you selected the **Save Send Configuration** option in the **Settings** tab of the **Scan Dialog,** the **Parcel Info** dialog box does not appear.

1. In the **Parcel Info** dialog, perform the following tasks:

- Enter text to describe the batch. The description of the batch remains with the batch throughout the entire workflow.
- Give the batch a priority setting. If you want the batch to appear first in this queue or the next queue in the workflow, select **High** in the **Priority** list box. **Normal** is the default setting.

2. In the **Parcel Info** dialog, perform the following tasks:

Parcel Info dialog tasks	
Button	**Description**
	Save the batch in the High Volume Scan queue. The batch remains in the queue until it is deleted or sent to the next queue in the workflow.
	Send the batch to the next queue in the workflow. The Send Manager dialog appears where you can select the queue and the user you want to send the batch to. For information on the **Send Manager** dialog, see Sending a Batch from the High Volume Scan Queue Using Send Manager.

Parcel Info dialog tasks	
Button	**Description**
	Continue working with the batch in the scanning mode.

Sending a Batch from the High Volume Scan Queue Using Send Manager

The **Send Manager** dialog is used to send a batch from the High Volume Scan queue to the next queue in the workflow.

Note: If you selected the **Save Send Configuration** option in the **Settings** tab of the **Scan Dialog,** the **Send Manager** dialog box does not appear.

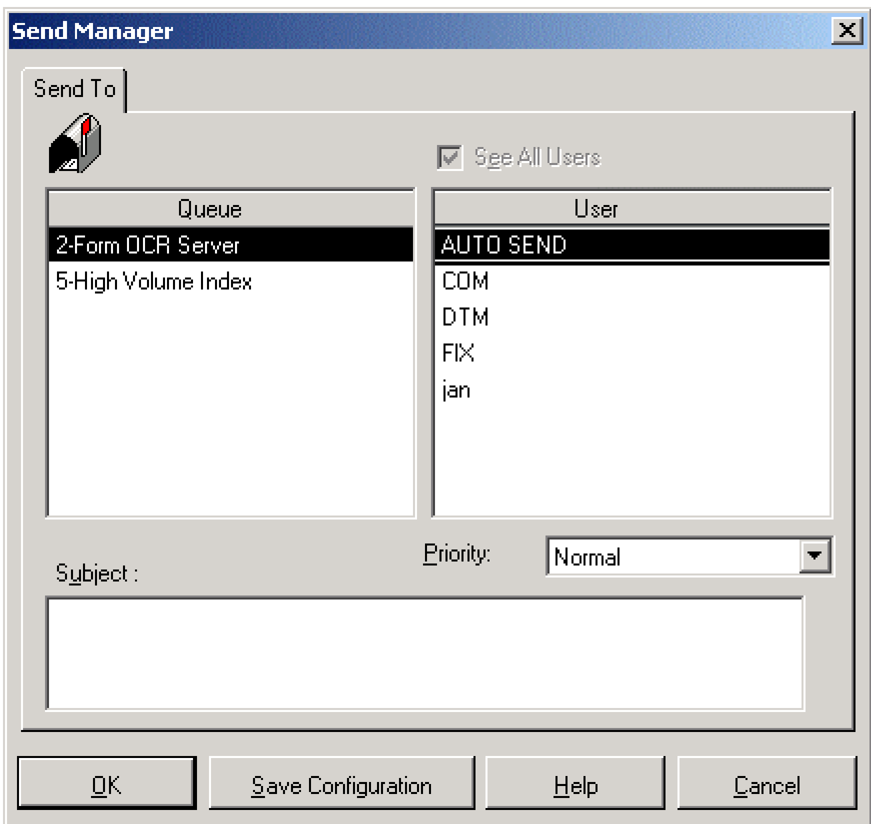


Figure 15: Send Manager dialog

The following table describes the **Send Manager** dialog fields:

Send Manager window fields	
Field	**Description**
Queue	Lists all queues that can receive the batch. In the **Queue** list, the user selects the desired queue. Once a queue is selected, all users assigned to that queue are displayed in the **User** list.
User	Lists all users that have access to a particular queue. If your system uses Corporate Locations, only users assigned to your location are listed. If the **See All Users** option is checked, all users regardless of location are listed. Information on Corporate Locations can be obtained from your system administrator.
Subject	Allows you to attach a temporary note to the batch. Notes are not permanent and can be overwritten at any time. Permanent notes must be attached to the document images.
Priority	Allows you to give the batch either a normal or high priority. High ensures that the batch is listed at the top of the next queue in the workflow.

Working with Batches and Documents

The following topics are described in this section:

- Modifying Batch Attributes
- Editing the Document Description
- Adding a Document to a Batch
- Modifying an Existing Document
- Sending Batches to the Fix Queue
- Specifying Display Settings
- Displaying a Document
- Viewing Individual Statistics
- Document Versioning
- Viewing Document Properties
- Sorting Documents Using the Sort Function

Modifying Batch Attributes

To add or change a batch description or priority, proceed as follows:

1. Highlight the batch and select **Edit > Modify Batch.**
2. In the **Modify Batch** dialog, enter the changes.
3. Click **OK.**

Editing the Document Description

To edit a document description, proceed as follows:

1. Highlight the document and select **Edit > Edit Document Description.**

   An empty box appears in the place of the **Document Description** field in the table.

2. Enter the description.
3. To close the box, press **Esc.**

Adding a Document to a Batch

To add a document to a batch, proceed as follows:

1. Select **Scan > Attach Document to Parcel.**
2. To scan the document, use the **Scan Dialog** as described in Scan Dialog Window.
3. Complete the scanning process and click **Close Batch,** or press **F12.**

   The batch with the new document is saved in the High Volume Scan queue.

Modifying an Existing Document

To add pages to or delete pages from an existing document, proceed as follows:

1. Highlight the document and select **Scan > Modify Document Pages.**

   The **Scan Dialog** appears.

2. To delete the page currently open in the Image Viewer, click **Delete Page.**
3. To rescan all document pages, click **Rescan All.**
4. To specify where the next scanned page is placed in the selected document, in the **Scan Target** list, select a setting.

   The following scan settings are available:

Scan Target	
Function	**Description**
Append	Places the new page at the end of the document.
After	Inserts a new page after the selected page.
Before	Places a new page before the selected page.
Replace	Replaces the selected page.

5. To scan the new page, click **Scan.**

For information on viewing and modifying images, see Chapter 11: Image Viewer.

Sending Batches to the Fix Queue

The Fix Queue handles batches or parcels that cannot be properly processed in the workflow.

To send a batch or parcel to the Fix Queue, proceed as follows:

1. Select the batch.
2. To open the **Send to Fix** dialog, select **Send > Send to Fix.**

   The **Send To Fix** dialog appears.

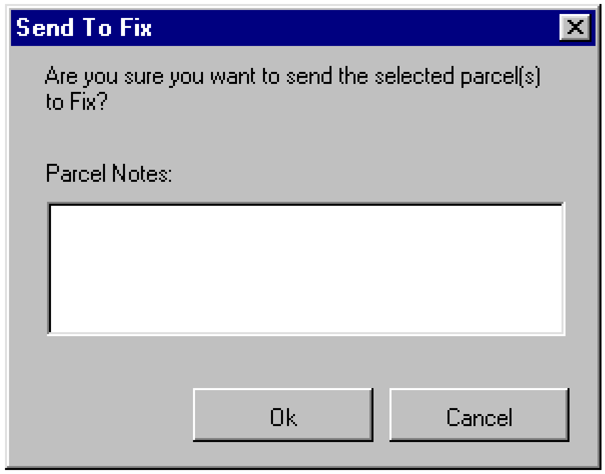


Figure 16: Send To Fix dialog

3. In the **Parcel Notes** field, enter notes about the problem batch.
4. Click **Ok.**

Specifying Display Settings

The **Advanced display settings** dialog is used to specify the mode in which documents are opened. The following options are available in the **Advanced display settings** dialog:

Advanced display settings options	
Name	**Description**
Default	Document is displayed in default mode with the following defaults: • If the checkin and checkout option is set during project configuration, the default is read-only. • If the checkin and checkout option is not set during project configuration, the default is read-write.
Read-Only	Document can be viewed but not modified.
Read/Write	Document can be viewed and modified.

To specify display settings for documents, proceed as follows:

1. Select **View > Advanced Display Settings.**

The **Advanced display settings** dialog appears.

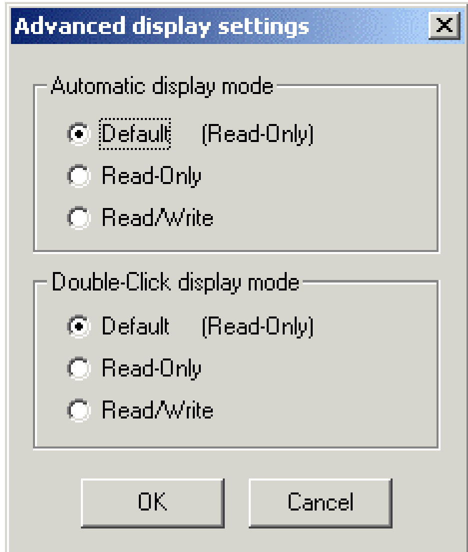


Figure 17: Specifying display settings

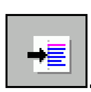
2. To specify the display mode of a document when its parcel is selected, in the **Automatic display mode** area, select one of the following:
   - **Default**
   - **Read-Only**
   - **Read/Write**

Note: Automatic display is not available for all nodes.

3. To specify the display mode of a double-clicked document, in the **Double-Click display mode** area, select one of the following:
   - **Default**
   - **Read-Only**
   - **Read/Write**
4. Click **OK.**

Displaying a Document

To view documents in the High Volume Scan queue, use any of the following methods:

- Select **View > Right Image Display.**
- Double-click a selected document.
- Click **Right Image Display** .

The document appears in the **Image Viewer** window.

Viewing Individual Statistics

Exigen Workflow keeps statistical information regarding the number of batches and documents processed by a queue and user.

To view the statistics for the current queue and user combination, select **View > My Statistics.** The **My Statistics** window displays the desired statistical information.

Document Versioning

Document versioning allows Exigen Workflow users to maintain differing versions of documents. For more information on document versioning, see Appendix B: Document Versioning.

Viewing Document Properties

To view document properties, proceed as follows:

1. In any workflow node, right-click a document and select **Properties.**

   The **Document Properties** window appears.

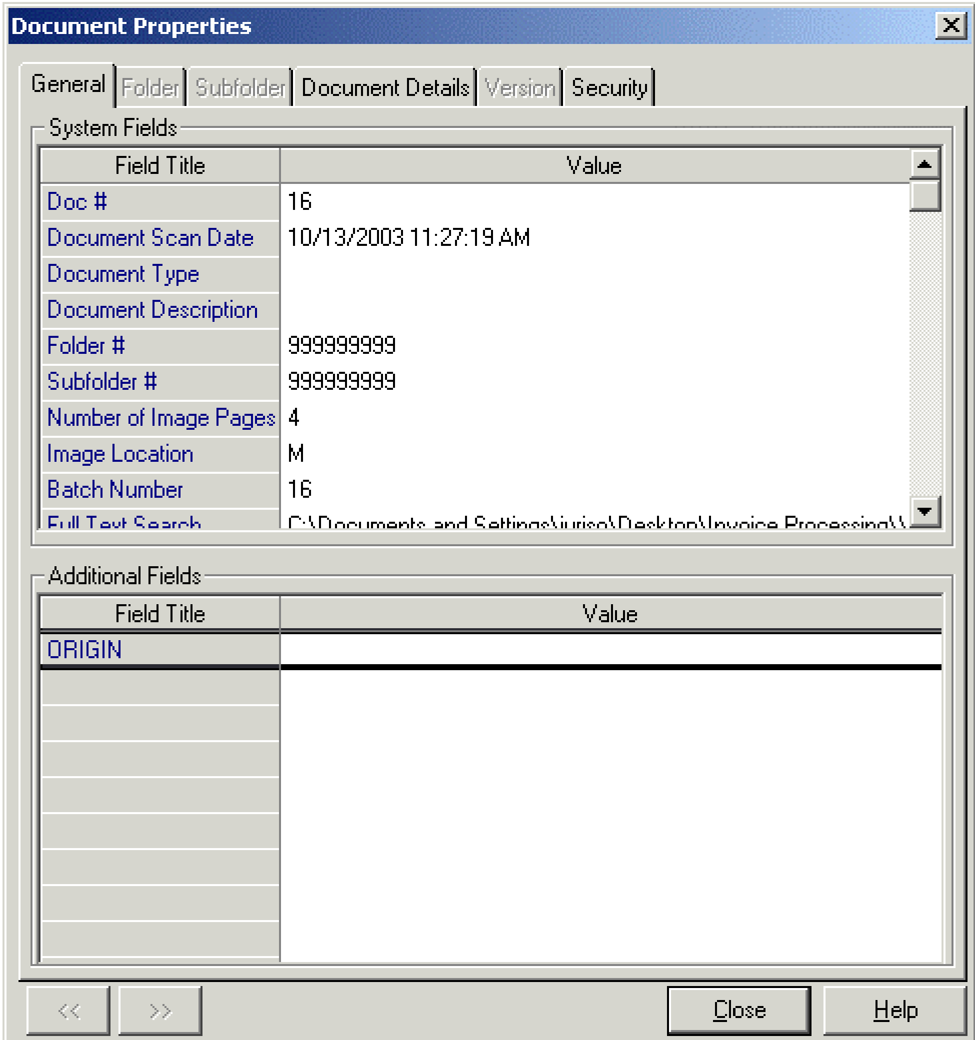


Figure 18: Viewing document properties

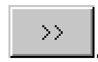
2. To view specific properties, click the appropriate tab.

   Document Properties window tabs are described in the following table:

Document Properties window tabs	
Tab	**Description**
General	Document fields and field values.
Folder	Document folder fields and field values.
Subfolder	Document subfolder fields and field values.
Document Details	Document details. For information on maintaining document details, see Maintaining Document Details.
Version	Document versions. For information on document versions, see Appendix B: Document Versioning.

Document Properties window tabs	
Tab	**Description**
Security	ACL based security settings for the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** For information on assigning ACL based security to documents, folders, and subfolders, see Specifying Document, Folder, and Subfolder Security Settings.

3. To view the previous document in the parcel, click the previous button 

.
4. To view the next document in the parcel, click the next button 

.
5. To close the **Document Properties** window, click **Close.**

Sorting Documents Using the Sort Function

To sort documents using the Sort function, proceed as follows:

1. To open the Sort window, proceed with one of the following:

- In the documents area, point and right-click. Select **Sort…**
- Select **View > Set Sort Order > Documents.**

The **Sort** window appears.

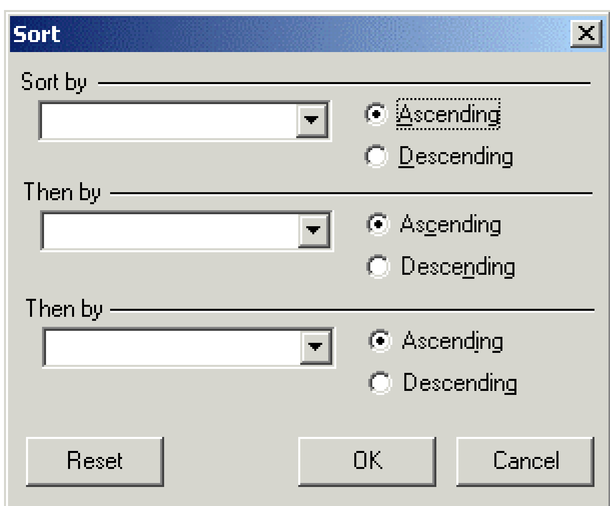


Figure 19: Sort window

2. Select the field to sort by.

The **Sort By** and **Then By** submenus list all fields that are displayed in the document table. The documents are sorted first by **Sort By** values and then by **Then By** values.

3. To change the sort order, click either **Ascending** or **Descending.**
4. To revert to the default sort order, select **Reset.**
5. To sort parcels, follow the same steps as for documents.
6. To save a sort setting, select **File > Save Configuration.**

Chapter 4: High Volume Indexing

This section describes how to file document images in folders using the High Volume Index workflow object.

The following High Volume Indexing topics are described in this section:

- Overview
- High Volume Indexing Basics
- Additional Parcel and Document Functions

Overview

This section explains High Volume Index queue functionality.

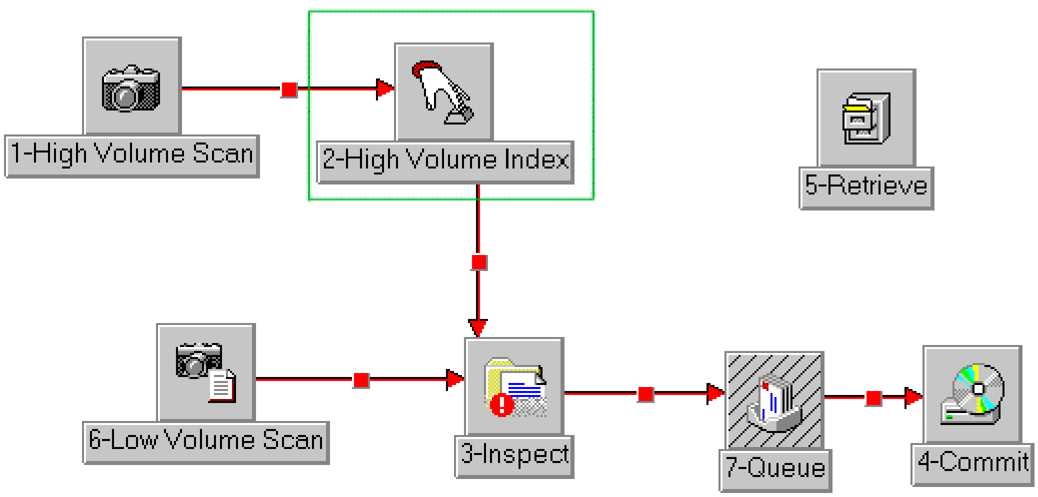


Figure 20: Basic workflow diagram with the High Volume Index object

After a document is scanned, it must be indexed. During the index process, a document image receives a document type. The document image is placed in a folder or in a subfolder within a folder.

During indexing, parcels and their associated documents are assigned or indexed to a specific folder. If the parcel contains a document that must be indexed in a different folder, the document must be placed in a separate parcel.

If ACL based security is applied to a project, a document can be assigned to a folder or subfolder only if the user has the right to create child objects in the folder or subfolder. For more information on ACL based security, see Specifying Document, Folder, and Subfolder Security Settings.

High Volume Indexing Basics

The following topics are described in this section:

- High Volume Indexing
- High Volume Index Window
- Defining High Volume Index Queue Properties
- Selecting Parcels in the Fix or Com Queue
- Displaying Documents
- Creating a Reference Document
- Assigning a Parcel to an Existing Folder
- Assigning a Parcel to a New Folder
- Filing Documents into Subfolders and Assigning Document Types
- Adding Subfolders
- Sending Indexed Parcels to the Next Queue

For information on viewing document properties, see Viewing Document Properties.

High Volume Indexing

The following topics are described in this section:

- Preparing a High Volume Index
- Specifying High Volume Indexing Properties

Preparing a High Volume Index

The following preliminary tasks are performed before using high volume indexing:

1. The system administrator must specify indexing fields. At least one field must be defined in the folder table.
2. Depending on the project type, the user can specify the folders and subfolders that are assigned to a parcel. You can use existing folders and subfolders or create new ones.

   Note that the system administrator creates document types and assigns document types to subfolders. Some restrictions may apply if the document types list is defined for subfolders in Project Builder.

For more information on indexing fields, folders, and subfolders, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects.

Specifying High Volume Indexing Properties

To use high volume indexing, proceed as follows:

1. In Exigen Workflow Explorer, double-click the **High Volume Index** icon.

   The **High Volume Index** window appears. For information on the High Volume Index window, see High Volume Index Window.

2. To specify the properties of the High Volume Index queue, select **Work > Define Queue Settings.**

   For information on the High Volume Index queue, see Defining High Volume Index Queue Properties.

3. Assign a parcel to an existing folder or to a new folder.

   For information on assigning a parcel, see Assigning a Parcel to an Existing Folder and Assigning a Parcel to a New Folder.

4. Assign a document type and a subfolder.

   For information on assigning a document type, see Filing Documents into Subfolders and Assigning Document Types.

5. To send indexed parcels to the next queue in the workflow, click **Send.**

   Send is available only if you have filled in all required index fields. The **Send Manager** dialog appears. For information on the **Send Manager** dialog, see Sending a Batch from the High Volume Scan Queue Using Send Manager.

6. Specify a queue and user to which you are sending the parcel. You can also enter a description and set a priority.

High Volume Index Window

The **High Volume Index** window contains the features required for high volume indexing of documents.

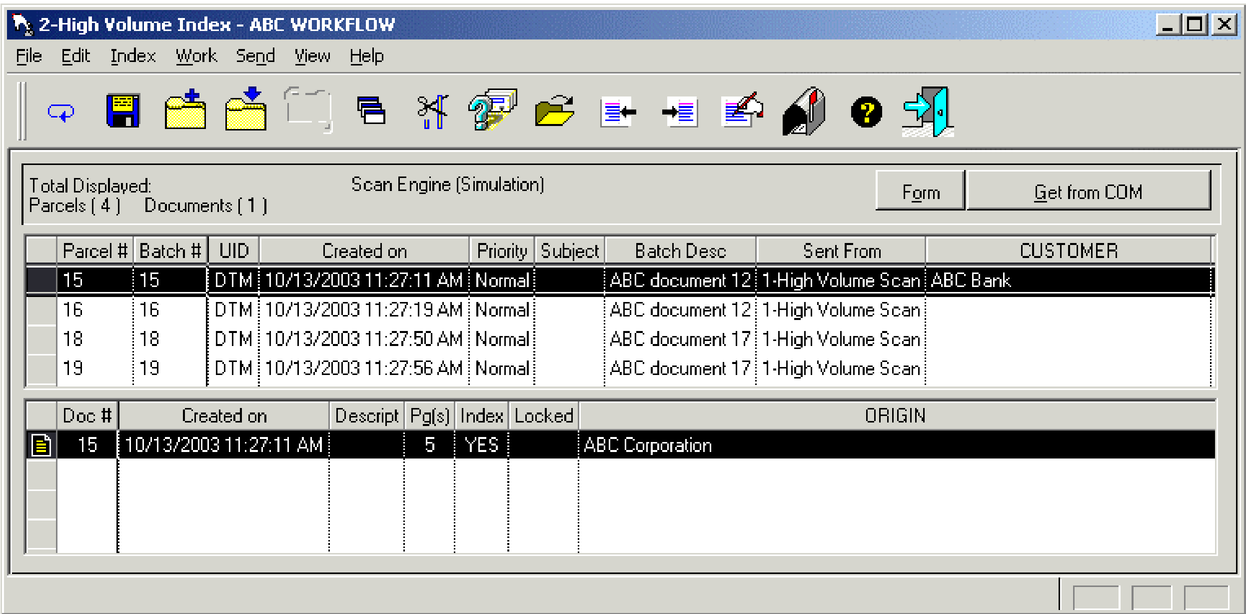


Figure 21: High Volume Index window

The **High Volume Index** window has the following sections:

High Volume Index features	
Feature	**Description**
Menu and button bars	Contain functions and utilities in the indexing queue. For more information on menus and buttons, see Appendix A: Exigen Workflow Menus and Buttons. If no batches are in the queue, the batch-specific and document-specific buttons and menu options are disabled.
Information line	Displays parcel, document, and common queue information.
Parcel table	Lists all parcels in the queue.
Document table	Lists all documents assigned to the selected parcel. Documents displaying a **Y** in the **Locked** column are checked out for editing.

The window displayed corresponds to the Folder-Subfolder-Document database structure chosen in the **Project Configuration** window of the Administrator application. Other possible database structures are Folder-Document and Folder.

If a document is opened, the focus can be on the **High Volume Index** window or Image Viewer, depending on the configuration. The focus determines which window is initially activated and displays system messages.

The focus is set by the system administrator as described in the *Exigen Workflow Administration Guide, Part 1: Design and Configuration,* Chapter 5: Designing a Workflow, Setting Viewer Focus.

Defining High Volume Index Queue Properties

Change property settings for the High Volume Index queue using the **Define Queue Settings** dialog.

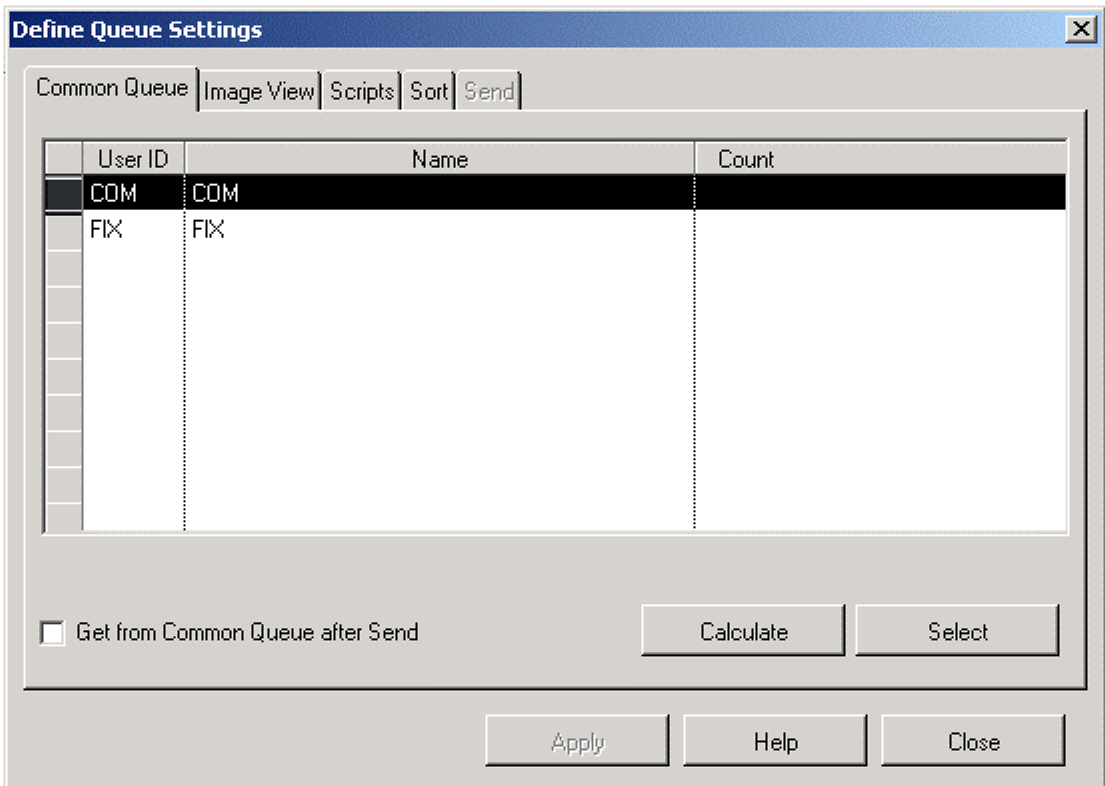


Figure 22: Define Queue Settings window

The following topics are described in this section:

- Common Queue Tab
- Image View Tab
- Scripts Tab
- Sort Tab
- Send Tab

Common Queue Tab

The Common Queue allows more than one user to pull jobs from the same location. The Fix Queue is responsible for handling parcels and documents that cannot be properly processed.

The **Common Queue** tab displays the names of the common queues and their user IDs. The following tasks are available in the **Common Queue** tab:

- To view the number of jobs in a common queue, click **Calculate.**
- To pull jobs from a common queue, select the queue and click **Select.**
- To automatically pull a job from the selected common queue, select the **Get from Common Queue after Send** box.

Note: If the **Get from Common Queue after Send** option is selected in Workflow Builder when the administrator sets up the workflow, it cannot be disabled by the user locally in the **Common Queue** tab. However, the user can enable the **Get from Common Queue after Send** option locally even if this option is not selected in Workflow Builder. For more information on building a workflow, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 5: Designing a Workflow.

- If this box is not selected, to pull a job from the selected common queue, click **Get from COM** in the **High Volume Index** window.

Note: If the Fix Queue is selected as the Common Queue, then you pull jobs from the common queue with **Get from FIX** in the **High Volume Index** window.

Image View Tab

The **Image View** tab controls the display of document images in the Image Viewer.

Image View tab	
Setting	**Description**
Always Show Image	Automatically displays a document each time it is selected.
Always Hide Image	Turns off automatic display. The user can select to display the document manually in the **Image** menu in the **High Volume Index** window.
Default Image View	Default setting.
No View Control	Prevents users from controlling the image display.

Scripts Tab

The **Scripts** tab is used to enter scripts for host programs or external applications.

Entering Scripts

To enter scripts, proceed as follows:

1. Enter the full path for the external application.
2. To open the external application selected in the **Scripts** tab, select **File > Activate Host Session.**

For information on external applications, see Connecting to an External Application or Host Session.

Sort Tab

The **Sort** tab is used to sort jobs that are pulled from the common queue. The order in which the fields are listed in the **Sort By Field** table is the order in which they are presented to the user.

The most important field, for example, bat_priority or parcel_rec_date, must be selected first. The jobs with the smallest value are pulled first. Contact your system administrator for an explanation of the field names.

Send Tab

The **Send** tab is used to determine whether parcels can be sent to all users or restricted to specific users.

Send tab	
Setting	**Description**
Local Send	Sends parcels only to users assigned to the same system location. The system administrator assigns the location of each user.
Global Send	Sends parcels to any user in the workflow regardless of location.

Note: If you logged in as a global user or if no corporate locations are being used, this tab is disabled

Selecting Parcels in the Fix or Com Queue

To pull parcels from the Com Queue, proceed as follows:

1. Select **Work > From Com.**
2. In the **High Volume Index** window, click **Get from COM.**

To pull parcels from the Fix Queue, proceed as follows:

1. Select **Work > From Fix.**
2. In the **High Volume Index** window, click **Get from FIX.**

When no more jobs are in either queue, a message appears.

Displaying Documents

To display a document, perform one of the following steps:

- Select the document and double-click the **Doc #** column.
- Click **Display document.**

The document appears in the Image Viewer on the right side of the window. If the document is already indexed, you can view it only by clicking **Display document.**

For information on specifying document display settings, see Specifying Display Settings in Chapter 3: High Volume Scanning.

Creating a Reference Document

To index the same document in more than one folder without having to scan the document several times, create a reference record of the document in the database by proceeding as follows:

1. Highlight the document and select **Edit > Create Reference Document.**

   A copy of the document is generated in the same parcel.

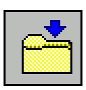
2. Create any number of reference documents.
3. When finished creating a reference document, split the parcel.
4. Index the document to a folder or subfolder.

Assigning a Parcel to an Existing Folder

Start indexing after the queue settings are configured and you have viewed the document.

To assign a parcel to an existing folder, select the parcel and find the folder in the system as follows:

1. Click **Assign Parcel to Existing Folder.**

Note: It is possible to assign several parcels to a folder simultaneously by holding down the **SHIFT** key and selecting the parcels.

The **Find Existing Folder** window appears.

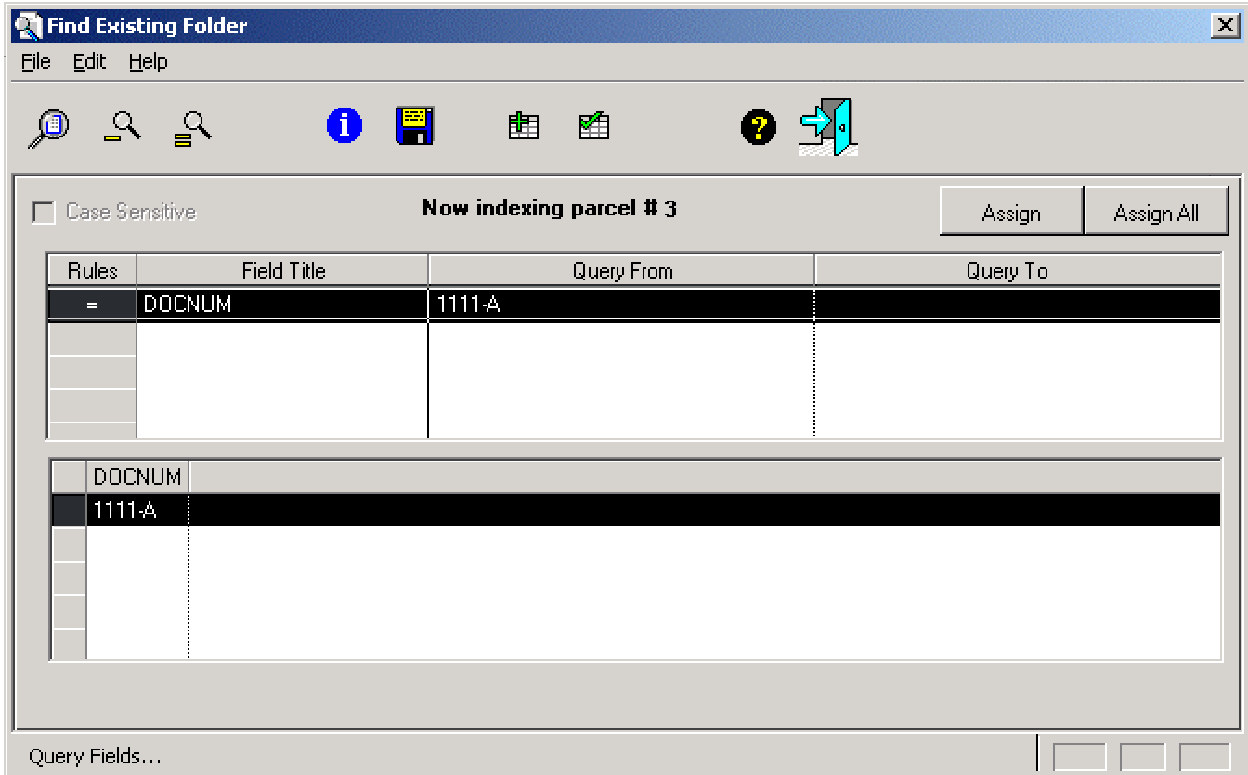
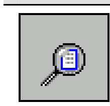
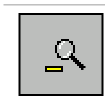
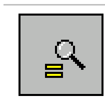
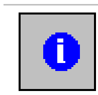
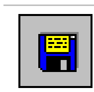
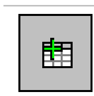
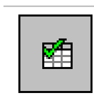
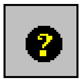
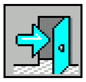


Figure 23: Find Existing Folder window

2. To perform any of the following functions, click the option buttons:

Find Existing Folder functions	
Button	**Description**
	Executes the query for all records meeting the search criteria.
	Clears the value in the selected field.
	Clears the values in all fields.
	Displays the selected folder information.
	Saves the location and size of the **Find Existing Folder** window.
	Opens the **Add/Modify Folder** window and adds a new folder.
	Opens the **Add/Modify Folder** window and modifies the selected folder.

Find Existing Folder functions	
Button	**Description**
	Opens the **Help** section for this window.
	Exits the **Find Existing Folder** dialog box.
Assign	Assigns the parcel to the selected folder.
Assign All	Assigns all parcels in the queue to the selected folder.

To specify a search, proceed as follows:

1. To differentiate between upper and lowercase letters, select the **Case Sensitive** box.

Note: Whether the **Case Sensitive** check box is enabled or disabled depends on the database sensitivity and the selection of **Support Case Sensitive Indexes** during project configuration.

2. In the **Rules** column, define the type of search with either an exact match **=** or with an approximate match **%** if the field type is character, such as **CHAR** or **VARCHAR.** To switch between **=** and **%,** click on either symbol.
3. If the field type is integer, use the **Query From** and **Query To** columns to set the minimum and maximum value for each field.
4. If the field type is character, in the **Query From** column, enter either the entire word **=** or a portion of the word **%.**

   The **Query To** column is disabled for character searches.
5. To execute the query, click **Find Folder.**

   If no records are found, the **Add Folder** dialog appears. For information on the **Add Folder** dialog, see Assigning a Parcel to a New Folder.

   All folders meeting the search criteria are listed in the bottom table.
6. To assign the parcel, highlight the desired folder and click **Assign.**

If no matching folders are found, the **Add Folder** window appears allowing you to add a new folder to the system.

Assigning a Parcel to a New Folder

The following topics are included in this section:

- Assigning a Parcel to a New Folder Using Role Based Security
- Assigning a Parcel to a New Folder Using ACL Based Security

Assigning a Parcel to a New Folder Using Role Based Security

The **Add Folder** window is used to assign documents to a new folder.

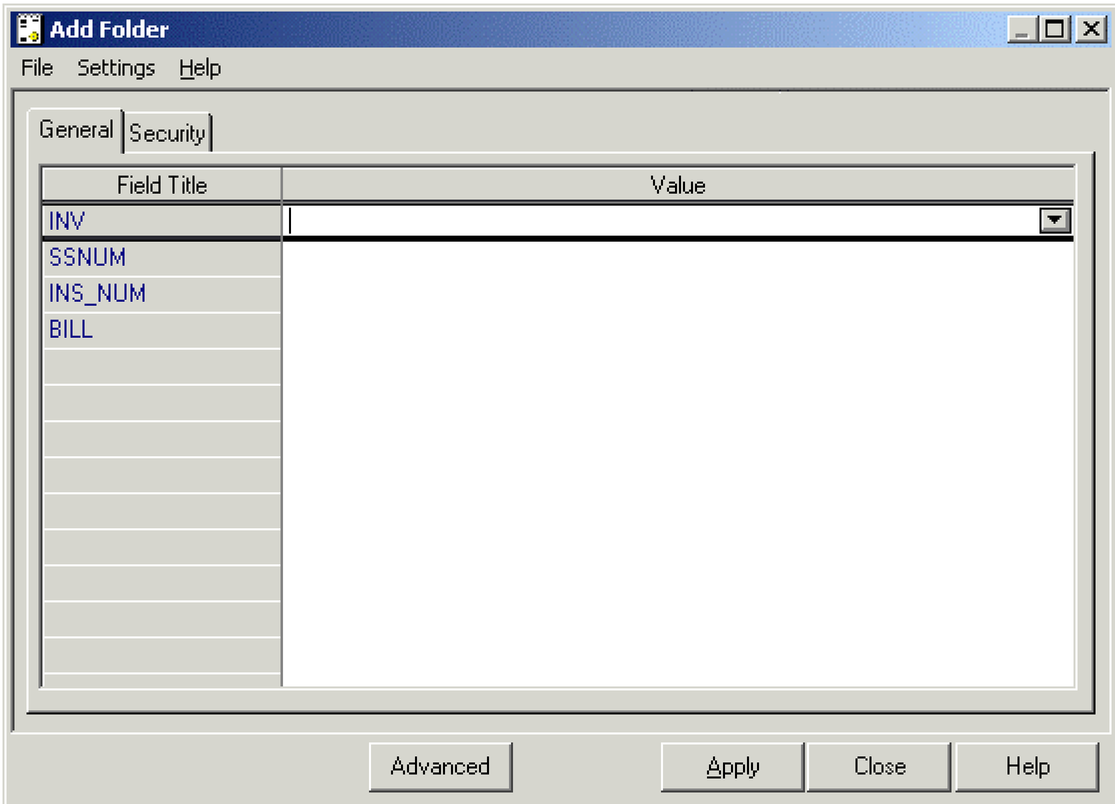


Figure 24: Add Folder window

If role based security is used, the following tabs are included in the **Add Folder** window:

- General Tab
- Security Tab
- Defining Reference Field Values

General Tab

Information in the **General** tab is used to define new folder field values. The tab contains a table that lists all folder fields defined in the system. Some of them are used to identify unique folders. If a required field is left empty, the system prompts you for an entry.

The **Advanced** button is used to define a set of reference field values for a document, folder, subfolder, or batchparcel. For more information on defining reference field values, see Defining Reference Field Values.

Security Tab

Information in the **Security** tab is used to limit access to specific folders based on user ID. During system setup, the system administrator assigns different levels of security. During indexing, the individual folder is assigned to a security access level that restricts access according to the parameters specified by the system administrator.

To assign the selected documents to a new folder, proceed as follows:

1. In the **High Volume Index** window, select **Index > Assign to New Folder.**

   The **Add Folder** window appears.

2. Select the **General** tab.
3. In the **Value** column, enter folder field values.

   If a field that has the **Word in Text** property enabled contains a word that is less than four characters long, the Retrieve and Work Item Submitter objects cannot find the new folder if the search is performed on this field. The fields with the **Word in Text** property enabled are identified by the **W** symbol in the **Rul** column in the Retrieve and Work Item Submitter objects.

4. To perform advanced tasks on the folder fields, select the **Settings** menu and select one of the following menu options as required:

Settings menu options	
Option	**Description**
Save Field Values	Saves the current field values.
Clear Field Values	Clears all field values.
Use Field Values	Applies the saved field values to the new folder.

5. Select the **Security** tab and perform the following tasks as required:
   - If a security group is required for the folder, in the list, select a group.

   Only users in the selected security group are allowed to access the folder.

   - To remove the assigned security group, click **Clear.**

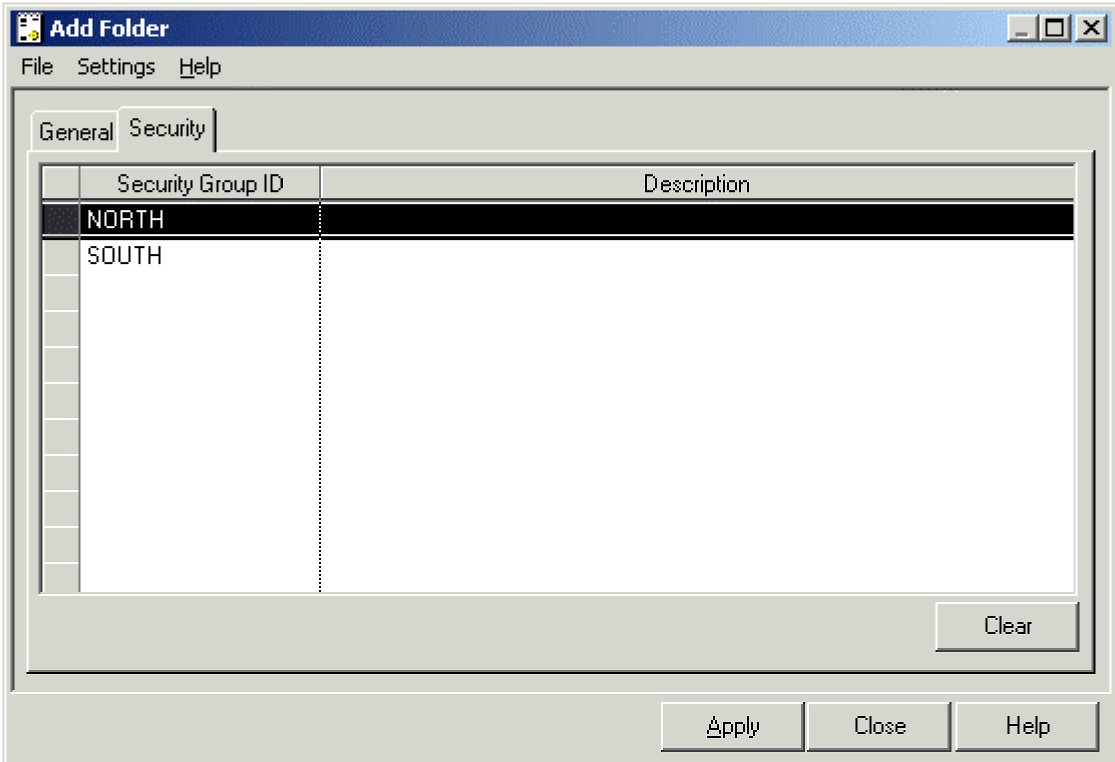


Figure 25: Add Folder window, Security tab

6. To save the folder with the specified values and assign the selected documents to it, click **Apply.**
7. To close the **Add Folder** window without applying changes, click **Close.**
8. To open context sensitive help, click **Help.**

Defining Reference Field Values

To define a set of reference field values for a document, folder, subfolder, or batchparcel, proceed as follows:

1. In the **Field Title** column, select a field.

   If reference field values can be set, the **Advanced** button appears.

2. Click Advanced.

   The **Table** window appears. Existing reference field values are displayed in the **Reference field values** box.

3. To add a value, in the **Value** field, enter the value.
4. Click **Add.**
5. To modify a value, in the **Reference field values** box, select a value.
6. In the **Value** field, enter a new value.
7. Click **Modify.**
8. To delete a value, in the **Reference field values** box, select a value.

9. Click **Delete.**
10. To save the settings and close the window, click **OK.**

Assigning a Parcel to a New Folder Using ACL Based Security

If ACL based security is used, the following tabs are included in the **Add Folder** window:

- General Tab
- Privileges Tab
- Groups and users Tab

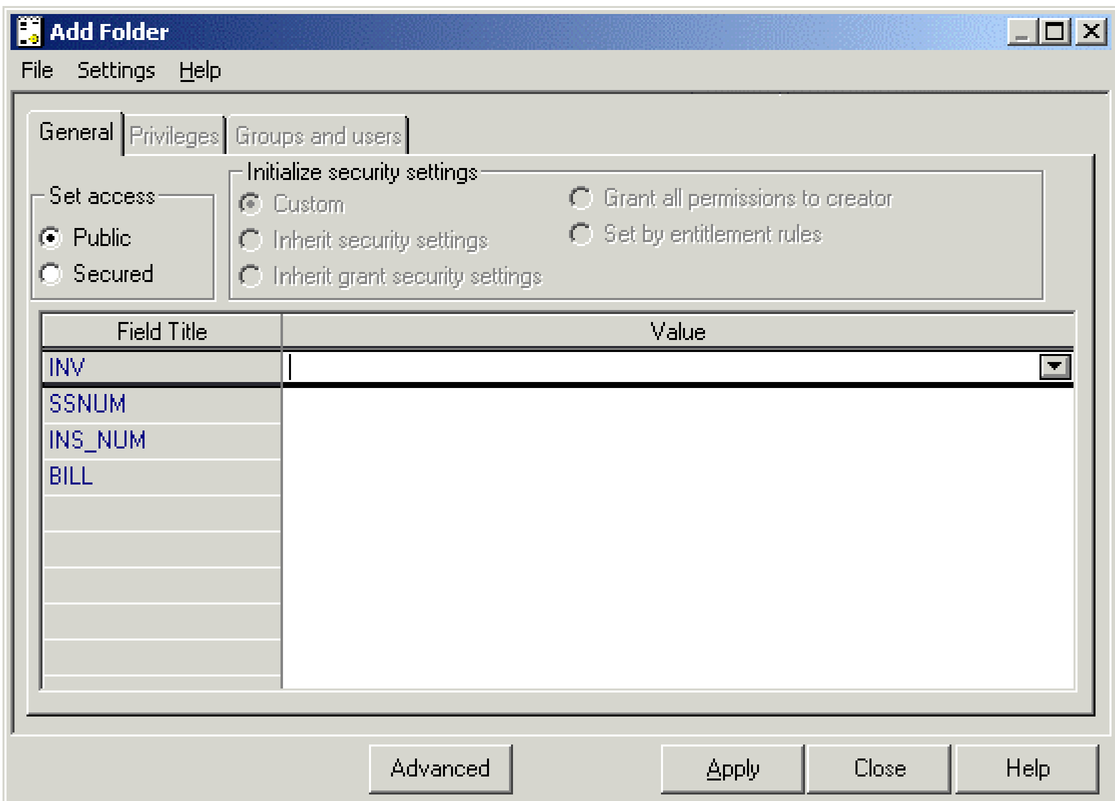


Figure 26: Add Folder window, General tab

General Tab

The upper section of the **General** tab is used to specify ACL based security settings as described in Specifying Document, Folder, and Subfolder Security Settings.

The lower section of the **General** tab is used to define new folder field values as described in General Tab.

For information on defining reference field values, see Defining Reference Field Values.

Privileges Tab

The **Privileges** tab is used to specify ACL based security privileges as described in Specifying Document, Folder, and Subfolder Security Settings.

Groups and users Tab

The **Groups and users** tab is used to define permissions for global groups and users as described in Specifying Document, Folder, and Subfolder Security Settings.

If ACL based security is used, to assign a parcel to a new folder, proceed as follows:

1. In the **High Volume Index** window, select **Index > Assign to New Folder.**

   The **Add Folder** window appears.

2. In the **Add Folder** window, select the **General** tab.
3. In the **Value** column, enter folder field values.

   If a field that has the **Word in Text** property enabled contains a word that is less than four characters long, the Retrieve and Work Item Submitter objects cannot find the new folder if the search is performed on this field. The fields with the **Word in Text** property enabled are identified by the **W** symbol in the **Rul** column in the Retrieve and Work Item Submitter objects.

4. To perform advanced tasks on the folder fields, select the **Settings** menu and select one of the following menu options as required:

Settings menu options	
Option	**Description**
Save Field Values	Saves the current field values.
Clear Field Values	Clears all field values.
Use Field Values	Applies the saved field values to the new folder.

5. Specify security settings as described in Specifying Document, Folder, and Subfolder Security Settings.

Filing Documents into Subfolders and Assigning Document Types

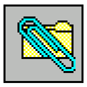
Depending on your system setup, additional indexing can be performed at either the subfolder and document level. Indexing can also be performed at the document level before the Send function is enabled, and the parcel can be sent to the next queue in the workflow.

If the system setup requires indexing at the subfolder level, all documents in the parcel must be filed into subfolders and assigned document types.

If ACL based security is assigned to a project, a document can be assigned to a subfolder only if the user has the right to create child objects in the subfolder. For more information on ACL based security, see Specifying Document, Folder, and Subfolder Security Settings.

If your system setup requires indexing at the document level, all documents in the parcel must be assigned a document type. The document type identifies a document and restricts user access. Subfolders and document types are defined and maintained by the system administrator.

To file documents into subfolders and assign document types, you must select a document and click **Assign Document to Subfolder and Document Type.**



The **Assign to Subfolder and Document Type** dialog box appears.

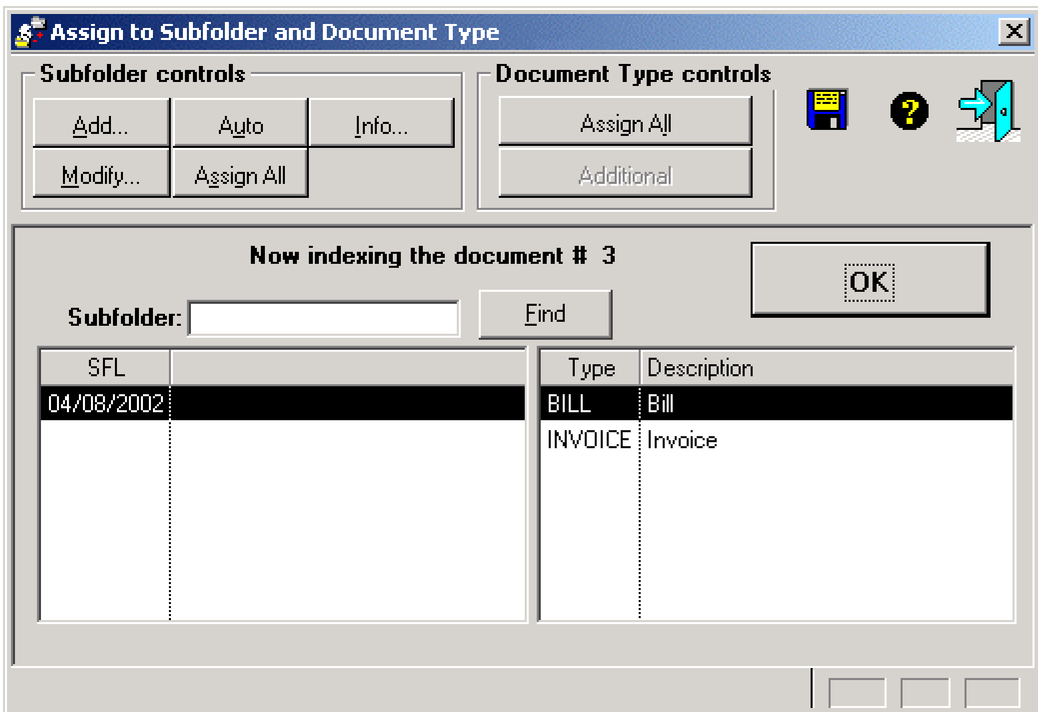


Figure 27: Assign to Subfolder and Document Type

This figure shows subfolders as the indexing structure. You must assign a subfolder to each document.

The **Subfolder controls** section has the following options:

Subfolder controls	
Option	**Description**
Add	Opens the **Add Subfolder** window. This window is used to create a new subfolder as described in Adding Subfolders.
Modify	Opens the **Modify Subfolder** window. This window is used to modify the selected subfolder. The **Modify Subfolder** window functionality is the same as in the **Add Subfolder** window. For more information on the **Add Subfolder** window, see Adding Subfolders.

Subfolder controls	
Option	**Description**
Info	Opens the **Subfolder Information** window.
Assign All	Assigns the selected subfolder to all documents in the parcel.
Auto	Automatically creates a subfolder using the current date and time. When the length of the subfolder field is smaller than the date field, which is 8 characters, the system generates a unique number and assigns it to a subfolder.
Find Subfolder	Locates specific subfolders.

The **Document type controls** section has the **Assign All** option. It assigns the selected document type to all documents in the selected parcel. The **Additional** option is enabled if additional document fields are specified for your application.

To set additional field values, proceed as follows:

1. Click the **Additional** button.

   The **Modify Additional Fields** dialog opens.

2. Modify the values as required.
3. Click **OK.**

   Each subfolder has its set of related document types displayed on the right. Only these document types can be selected.

4. To assign subfolder and document type to the documents, make your selections and click **OK.**

Note: If documents are indexed on folder and document type level, only the document type table is displayed.

Adding Subfolders

The following topics are included in this section:

- Adding a Subfolder Using Role Based Security
- Adding a Subfolder Using ACL Based Security

Adding a Subfolder Using Role Based Security

The **Add Subfolder** window is used to create new subfolders.

If role based security is used, the **Add Subfolder** window includes the following tabs:

- General Tab
- Security Tab

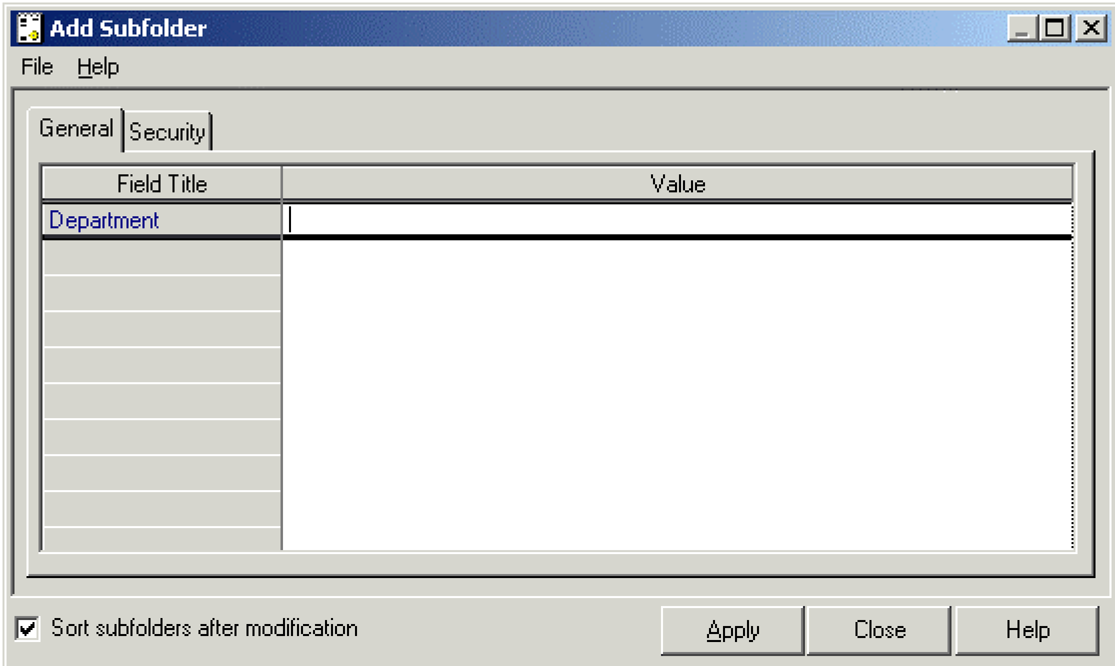


Figure 28: Add Subfolder window

General Tab

The **General** tab is used to define new subfolder field values. The tab contains a table that lists all subfolder fields defined in the system. Some of them are used to identify unique subfolders. If a required field is left empty, the system prompts you for an entry.

Security Tab

The **Security** tab is used to limit access to specific subfolders based on user ID. During system setup, the system administrator assigns security levels. During indexing, the individual subfolder is assigned to a security access level that restricts access according to the parameters specified by the system administrator.

To specify values for the new subfolder fields, proceed as follows:

1. Select **Index > Assign to Subfolder and Document Type.**

   The **Assign to Subfolder and Document Type** window appears.

2. Click **Add.**

   The **Add subfolder** window appears.

3. Select the **General** tab.
4. In the **Value** column, enter subfolder field values.

   If a field that has the **Word in Text** property enabled contains a word that is less than four characters long, the Retrieve and Work Item Submitter objects cannot find the new folder if the search is performed on this field. The fields with the **Word in Text** property enabled are identified by the **W** symbol in the **Rul** column in the Retrieve and Work Item Submitter objects.

5. Select the **Security** tab and perform the following tasks as required:
   - If a security group is required for the subfolder, in the list, select a group.

   Only users in the selected security group are allowed to access the subfolder.

   - To remove the assigned security group, click **Clear.**

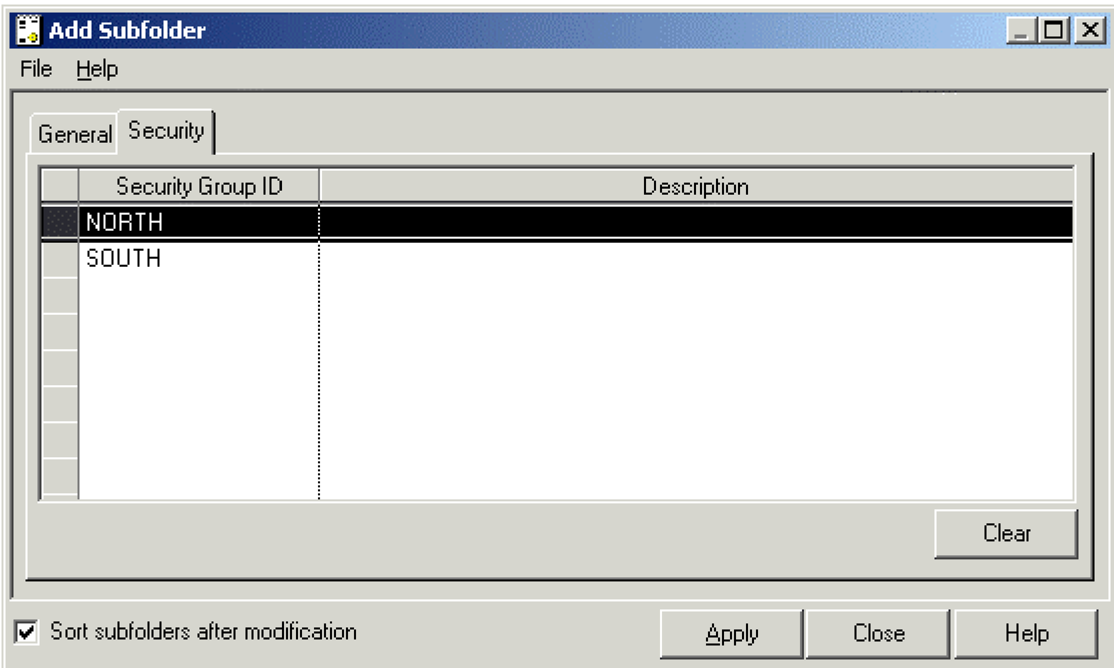


Figure 29: Add Subfolder window, Security tab

6. To sort the subfolder list alphabetically after applying the changes, select the **Sort subfolders after modification** check box.
7. To save the subfolder with the specified values, click **Apply.**
8. To close the **Add Subfolder** window without applying changes, click **Close.**
9. To open the context sensitive help, click **Help.**

Adding a Subfolder Using ACL Based Security

If ACL based security is used, the following tabs are included in the **Add subfolder** window:

- General Tab
- Privileges Tab
- Groups and users Tab

General Tab

The upper section of the **General** tab is used to specify ACL based security settings as described in Specifying Document, Folder, and Subfolder Security Settings.

The lower section of the **General** tab is used to define new subfolder field values as described in General Tab.

Privileges Tab

The **Privileges** tab is used to specify ACL based security privileges as described in Specifying Document, Folder, and Subfolder Security Settings.

Groups and users Tab

The **Groups and users** tab is used to define permissions for global groups and users as described in Specifying Document, Folder, and Subfolder Security Settings.

If ACL based security is used, to assign a parcel to a new subfolder, proceed as follows:

1. In the **High Volume Index** window, select **Index > Assign to Subfolder and Document Type.**

   The **Assign to Subfolder and Document Type** window appears.

2. Click **Add.**

   The **Add subfolder** window appears.

3. In the **Add subfolder** window, select the **General** tab.
4. In the **Value** column, enter subfolder field values.

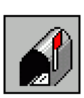
   If a field that has the **Word in Text** property enabled contains a word that is less than four characters long, the Retrieve and Work Item Submitter objects cannot find the new folder if the search is performed on this field. The fields with the **Word in Text** property enabled are identified by the **W** symbol in the **Rul** column in the Retrieve and Work Item Submitter objects.

5. Specify security settings as described in Specifying Document, Folder, and Subfolder Security Settings.

Sending Indexed Parcels to the Next Queue

To send indexed parcels to the next queue, proceed as follows:

1. After all index fields are filled and **YES** appears in the **Index** column of the document table, click **Send.**

   The **Send Manager** dialog opens to send the parcel to the next queue in the workflow. For more information on the **Send Manager** dialog, see Sending a Batch from the High Volume Scan Queue Using Send Manager in Chapter 3: High Volume Scanning.

2. To send multiple indexed parcels, select **Send > Select All Indexed Parcels.**

This highlights all indexed parcels and sends them when the Send function is complete.

Warning: If routing rules are being used, parcels must be sent one at a time.

Note: If ACL based security is enabled and the user has no permission to read or modify the documents in a parcel, the user can send the parcel to the next node only if a folder is assigned to the parcel.

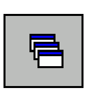
Additional Parcel and Document Functions

The following topics are described in this section:

- Splitting Parcels
- Creating a New Parcel
- Merging Parcels
- Searching for Batches or Parcels
- Deleting Parcels and Documents
- Editing Document and Parcel Fields
- Changing Folder Attributes
- Editing Documents
- Displaying the Contents of a Parcel
- Sending Parcels to the Fix or Com Queue
- Sending Email
- Copying and Exporting Documents
- Sorting Parcels and Documents
- Maintaining Document Details
- Viewing Individual Statistics
- Connecting to an External Application or Host Session
- Specifying Document, Folder, and Subfolder Security Settings

Splitting Parcels

To assign a separate parcel for each document in an existing parcel, click **Split Parcel.**



Each document in the original parcel is moved to its own parcel, and the original parcel is deleted.

Note: Each new parcel keeps any indexing information entered at either the folder or parcel level.

Creating a New Parcel

To create a parcel that contains more than one document, proceed as follows:

1. In the document table, select the documents. To select more than one document, press the **CTRL** key and select the desired documents.

   If no documents are selected, Exigen Workflow takes the first document in the parcel and reassigns it.

2. Select **Edit > Create New Parcel.**

   A new parcel containing the selected documents is created.

Note: The new parcel does not retain any indexing settings. Indexing values must be reassigned.

Merging Parcels

Merge two or more parcels when routing several documents to the next queue in the workflow.

To merge two or more parcels, proceed as follows:

1. Press **CTRL** and, in the parcel list, select the parcels.
2. Select **Edit > Merge Parcels.**

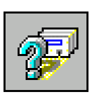
The documents are merged into one parcel. The new parcel is assigned the lowest parcel number. The remaining parcels are deleted from the system.

Searching for Batches or Parcels

The **Query** tool is used to search for a specific batch or parcel.

Note: The Query tool only searches for batches or parcels among those assigned to the same queue and user from which the query is being performed.

1. To begin a search, click **Query Parcel Records.**



The **Query Parcel Records** window appears.

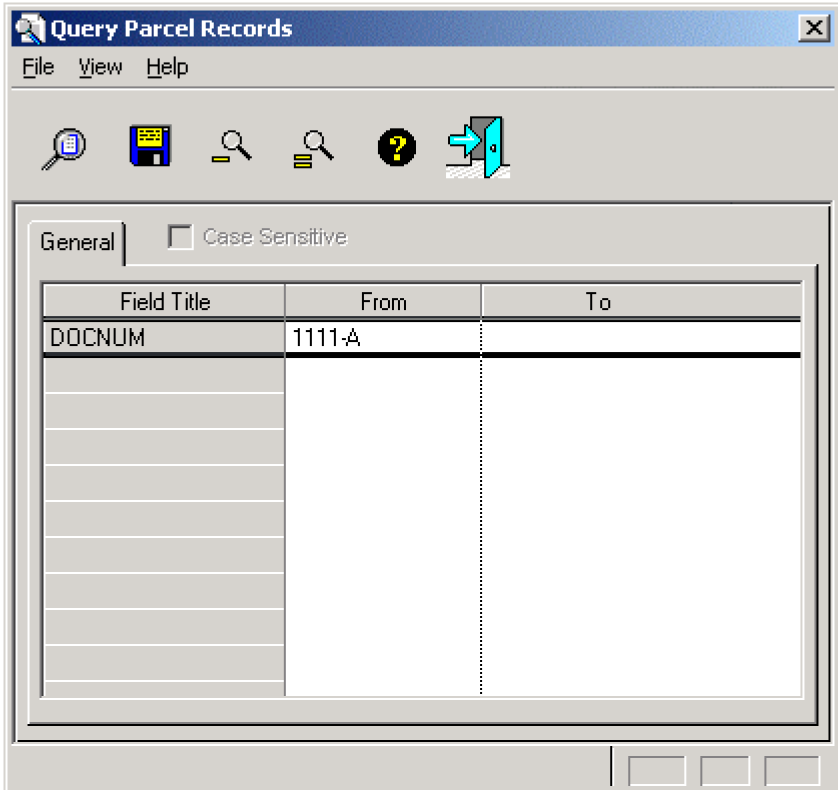
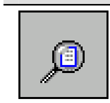
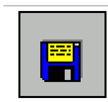
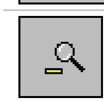
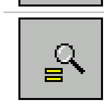
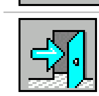


Figure 30: Query Parcel Records window

The buttons in the toolbar allow you to perform the following functions:

Query Parcel Records functions	
Button	**Description**
	Executes the query for all records that meet the search criteria.
	Saves the window configuration.
	Clears the value in the selected field.
	Clears the value in all fields.
	Exits the **Query Parcel Records** dialog.

Field Title displays all fields that can be used as values in your search.

2. In the **From** field, enter one or more values.
3. If a searchable field is defined as a date or integer field, use both the **From** and **To** fields to search for a range.

Note: Whether the **Case Sensitive** check box is enabled or disabled depends on the database sensitivity and the selection of Support Case Sensitive Indexes in the Project Configuration.

All batches or parcels that meet the search criteria are displayed. If no batches or parcels meet the search criteria, the **Status Bar** in the Query Parcel Records window displays the following message:

```
No Records Found
```

Deleting Parcels and Documents

To delete a parcel and all documents assigned to it, proceed as follows:

1. Select the parcel.
2. Select **Edit > Delete Parcel.**

To delete a document, proceed as follows:

1. Select the document.
2. Select **Edit > Delete Document.**

Only one parcel or document can be deleted at a time.

Warning: The delete function permanently removes parcels and documents from the system.

Editing Document and Parcel Fields

You can add and modify document and parcel fields, such as a description field.

To change a document description, proceed as follows:

1. Select the document.
2. Select **Edit > Document Description.** You can also double-click the **Description** column.
3. Edit the document description.
4. Click **OK.**

To add customized fields at the document level, proceed as follows:

1. Select the document.
2. Select **Edit > Modify Additional Document Fields.**

   The **Process Additional Document Fields** window appears.

3. Enter applicable values in the document table.
4. Click **OK.**

To add customized fields at the parcel level, proceed as follows:

1. Select the parcel.

2. Select **Edit > Modify Additional Parcel Fields.**

   The **Process Additional Batchparcel Fields** window appears.

3. Enter appropriate values.
4. Click **OK.**

Note: If the **Modify Additional Document/Parcel Fields** option is disabled, there are no additional document or parcel fields specified in your system. Ask your system administrator to add these fields if required.

Changing Folder Attributes

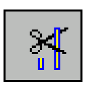
To revise folder attributes, proceed as follows:

1. Select **Edit > Modify Current Folder.**
2. Revise the attributes in the **Add/Modify Folder** window.
3. Click **Assign.**

Editing Documents

To modify pages in a document or to create new documents from an existing one, proceed as follows:

1. To access the **Edit Tools** window, select **File > Edit Tools** or click **Select Edit Tools.**

   The **Edit Tools** window appears.

   Warning: In general, referenced documents cannot be edited with Edit Tools. Referenced documents can be moved to other storage media, but cannot be updated. The only exception is DMS documents, which can be merged.

Figure 31: Edit Tools window

2. In the **Edit Tools** window, select revisions.
3. Click **OK.**

Edit Tool Functions

The following Edit Tool functions are described in this section:

- [Splitting a Document]

- Merging Documents
- Rearranging Page Order
- Creating Two Documents from a Single Document Using the Portions Function
- Deleting Pages from a Document
- Restoring a Deleted Page Using Undelete

Splitting a Document

The split function creates two documents from a single document. Both documents are assigned a unique document number.

To split a document into two documents, proceed as follows:

1. In the **Edit Tools** window, click **Split.**
2. In the **Split Document** dialog, enter the first and last pages of the original document. If the new document is only one page, enter the page number in both fields.
3. If you do not want to keep a copy of the original document, select the **Delete Original Document** check box.
4. To copy the original document details to the new documents, select the **Copy Document's Details** check box.

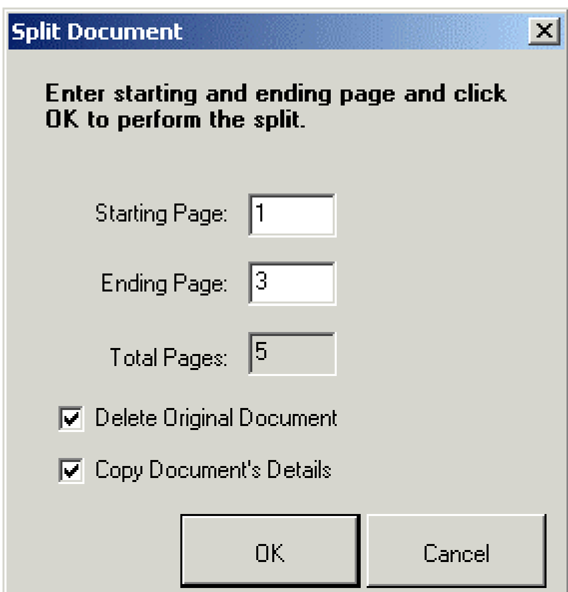


Figure 32: Split Document window

5. Click **OK.**

Merging Documents

The merge feature merges two or more documents into one.

The merge functionality depends on the project's security scheme and user rights. The following table describes the effect of security schemes on merge functionality:

Effect of security schemes on merge functionality	
Security scheme	**Effect**
Role based security	All documents available to the user can be selected and merged.
ACL based security	User access rights determine which documents can be modified and merged: • A user with grant full rights can configure ACL based security settings for merged documents and manually modify privileges. The user can merge all documents. • A user with grant limited rights can configure ACL based security settings for merged documents. The user can merge documents. However, if the documents have privileges to which the user has no access or the documents have additional group or user access permissions, these privileges and permissions must be identical; otherwise, documents cannot be merged. • A user with no grant full and no grant limited rights can merge only those documents that have identical security settings.

For information on the security scheme that is enabled, consult the system administrator.

The following topics are described in this section:

- Selecting Documents to Merge
- Configuring Privileges for Merged Documents
- Previewing or Modifying Privileges for Merged Documents

Selecting Documents to Merge

To select documents to merge, proceed as follows:

2. In the **Edit Tools** window, click **Merge.**

   The **Merge Documents** window appears.

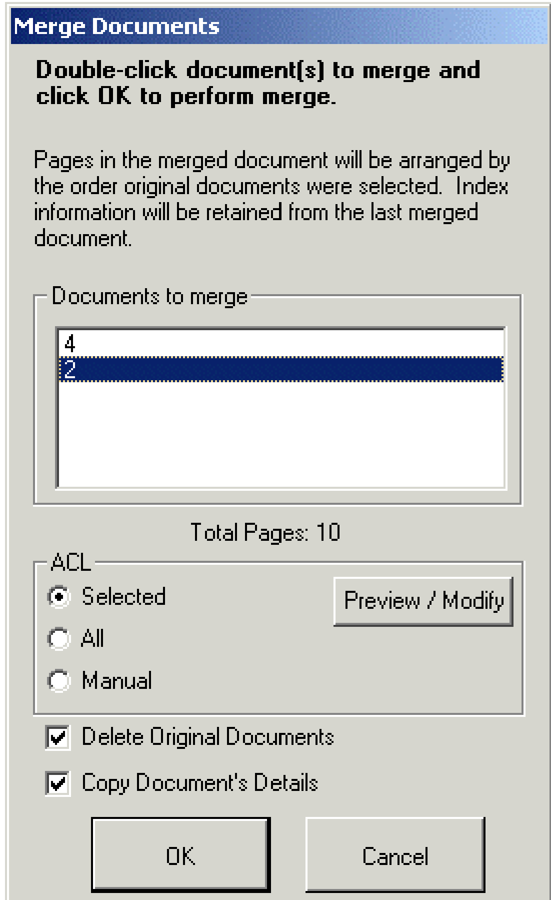


Figure 33: Merging documents

In the **Merge Documents** window, the **ACL** section appears only if ACL based security is activated for the project.

3. In the node window, select a parcel containing documents to be merged.
4. To select documents in the parcel, double-click them.

   If the documents cannot be merged, an error message is displayed. For information on merge restrictions, see Merging Documents.

5. Repeat steps 3 and 4 until all documents to be merged are selected.

   The document numbers appear in the **Merge Documents** window in the order in which they are selected. This is also the order in which they are placed in the new document. The new document is assigned a unique document number.

6. To remove a document from the list, in the **Documents to merge** field, double-click the document number.
7. If the project uses ACL based security and you have grant all or grant limited rights, configure the document privileges as described in Configuring Privileges for Merged Documents.
8. To delete the original documents, select **Delete Original Documents.**

If ACL based security is used, the document is deleted only if the user has delete permission for the document. If the user does not have delete permission, an error message is displayed.

9. To copy document details, select **Copy Document's Details.**
10. Click **OK.**

The documents are merged into one parcel. Indexing information is obtained from the last document in the list of merged documents. Document indexing information for the remaining documents is deleted.

Configuring Privileges for Merged Documents

If the user has grant full or grant limited rights, the **ACL** section in the **Merge Documents** window is enabled. The **ACL** section is used to configure privileges for merged documents.

To configure privileges for merged documents, proceed as follows:

1. In the **ACL** section, select one of the following options:

ACL based security configuration options	
Option	**Description**
Selected	Merged document has the same ACL based security settings as the document selected in the **Documents to merge** box.
All	ACL based security for the merged document is the sum of privileges of all documents that are merged.
Manual	Privileges for the merged document are manually configured by the user.

2. If you have grant full or grant limited rights, to configure privileges manually, proceed as described in Previewing or Modifying Privileges for Merged Documents.

Previewing or Modifying Privileges for Merged Documents

Users with grant full rights can modify all privileges manually. Users with grant limited rights can modify only the privileges to which they have access.

To preview or modify privileges for merged documents, proceed as follows:

1. In the **ACL** section, click **Preview / Modify.**

   The **Document Security** window appears.

2. To preview privileges, select any enabled tab.
3. To set privileges, follow the instructions in Specifying Document, Folder, and Subfolder Security Settings, steps 1 through 12.

Rearranging Page Order

The rearrange feature rearranges the page order within a document.

To rearrange page order within a document, proceed as follows:

1. Select the page that is the first page in the new, rearranged document.

2. To open the **Rearrange Documents** window, click **Rearrange.**
3. Click **Add.**

   The page number is listed in the **Order of document pages** box.

4. Continue adding pages until the page numbers are in the correct order in the **Order of document pages** box.
5. To place a page before another in the **Order of document pages** list, display the page and click **Insert.**
6. To delete a page from the document, select the page number in the **Order of document pages** list and click **Remove.**
7. If you do not want to keep a copy of the original document, select the **Delete Original Document** check box.
8. Click **OK.**

Note: Another way of rearranging document pages is to use Image Viewer as described in Chapter 11: Image Viewer.

Creating Two Documents from a Single Document Using the Portions Function

The portions function creates two or more documents from a single document. The new documents can each have the same number of pages.

To use the portions function, proceed as follows:

1. To open the **Portions** window, click **Portions.**
2. In the **Split Document** field, enter the number of pages you want the resulting documents to have.
3. If you do not want to keep a copy of the original document, select the **Delete Original Document** check box.
4. Click **OK.**

Note: If the number of pages in the original documents is not divisible by the portion size, the last document contains the remaining pages.

Deleting Pages from a Document

Delete removes selected pages from a document.

To use the delete feature, proceed as follows:

1. Select documents that you want to delete.
2. Click **Delete.**

   The confirmation window appears.

3. Click **Yes.**

Warning: You cannot delete the last page in a document. Instead, you must delete the whole document.

Restoring a Deleted Page Using Undelete

Undelete restores a deleted page.

To undelete, proceed as follows:

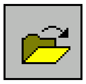
1. Select the document the page was deleted from.
2. Click **Undelete.**

   The page is restored to the document in its original place. Any page can be deleted or restored at any time.

For information on viewing and modifying images, see Chapter 11: Image Viewer.

Displaying the Contents of a Parcel

The **Parcel View** window displays thumbnails of all the pages in a document. To open the **Parcel View** window, click **Parcel View.**



The **Parcel View** window appears.

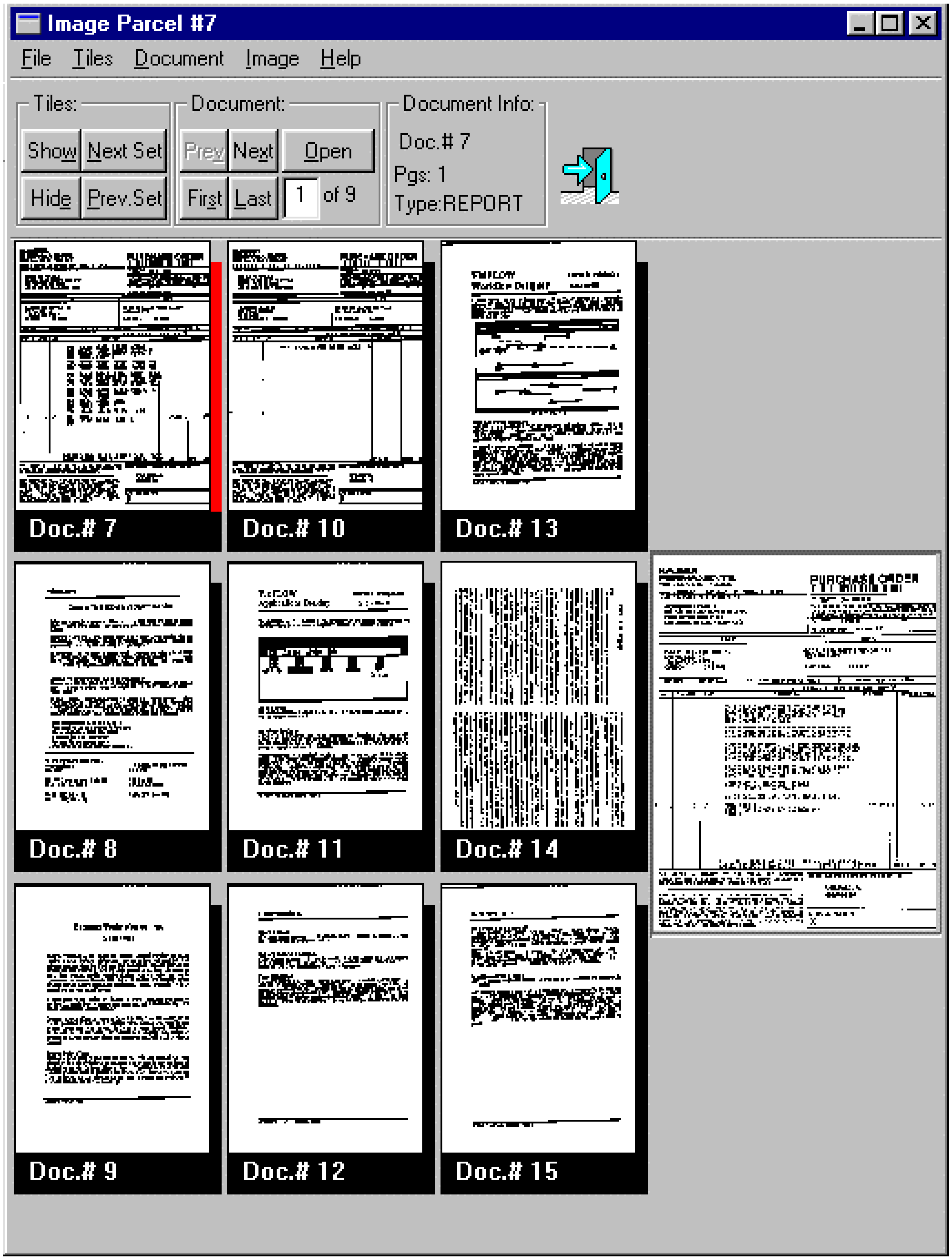


Figure 34: Parcel View window

The following functions are available in the **Tiles** group:

Tiles group	
Function	**Description**
Show/Hide	Displays or hides the document tiles.
Next Set/Prev Set	Displays the next or previous set of tiles.

In the **Document** group, the following functions are available:

Document group	
Function	**Description**
Prev/Next	Displays the previous or next document tile.
First/Last	Displays the first or last document tile in the parcel.
Open	Starts the Image Viewer and displays the selected document for viewing and modification.

Sending Parcels to the Fix or Com Queue

The Fix Queue handles parcels and documents that cannot be properly processed. To send a parcel to the Fix Queue, highlight the parcel and select **Send > Send to Fix.**

The Com Queue allows more than one user to pull jobs from the same location. To send a parcel to the Com Queue, highlight the parcel and select **Send > Send to Com.**

Sending Email

Exigen Workflow allows you to create packages that can include parcels, documents, and folders. These packages can be attached to electronic mail.

Exigen Workflow uses the default email client program to send email.

To specify the default email client program, proceed as follows:

1. Select **Start > Settings > Control Panel > Internet Options > Programs.**
2. Select the appropriate email program.

To attach packages to email, proceed as follows:

1. To open the **Send Email** window, select **Send > Send Email.**

   The **Send E-mail** window appears.

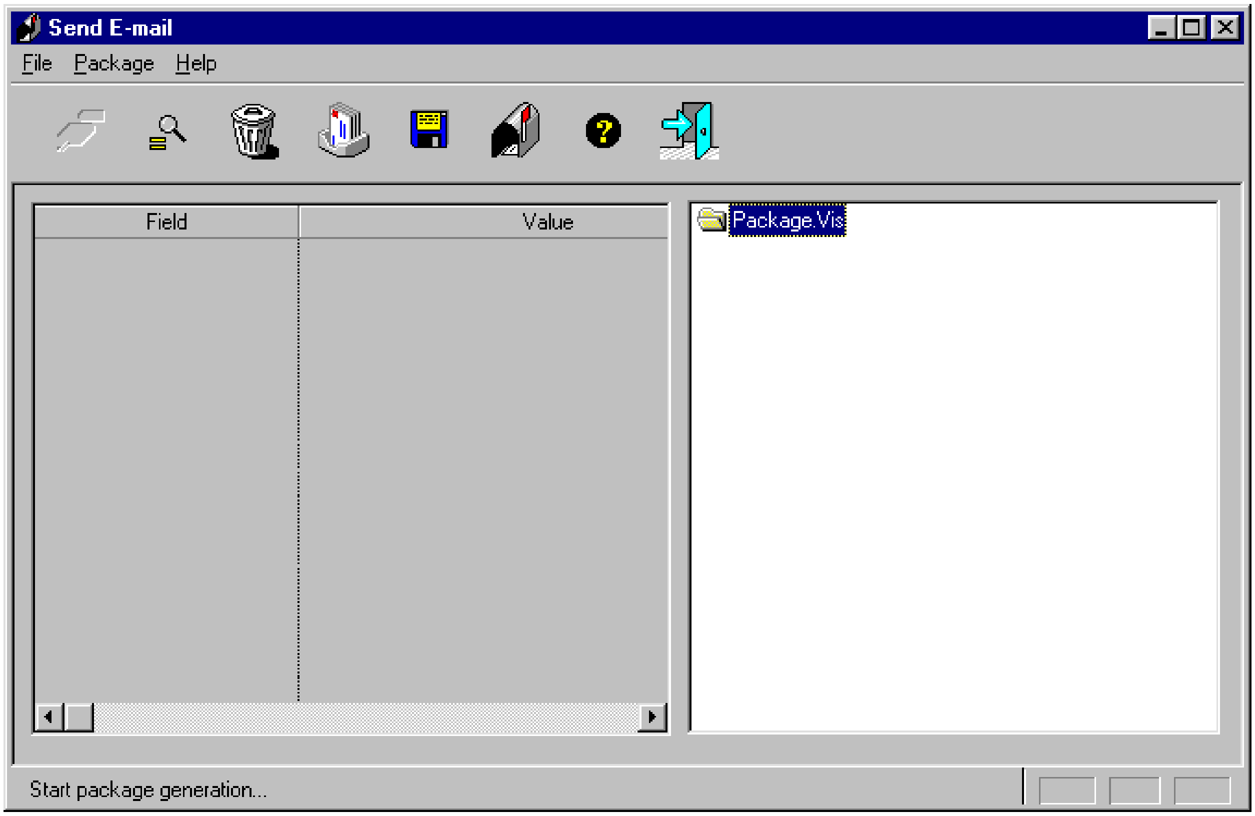


Figure 35: Send Email window

2. To open the **Package Generation** dialog, click **Start package generation.**

   The **Package Generation** window appears.

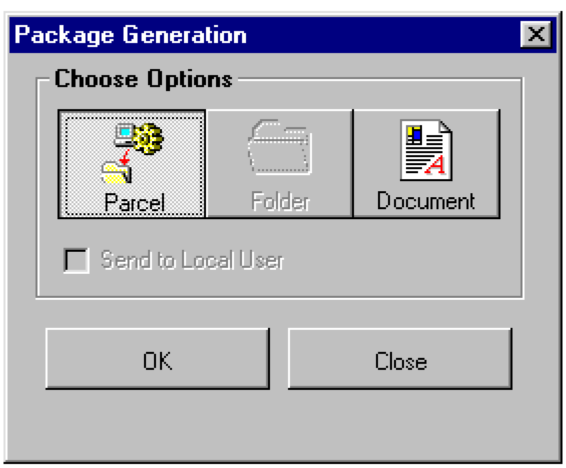


Figure 36: Package Generation dialog

The **Package Generation** dialog has the following functions:

Package Generation functions	
Function	**Description**
Parcel	Places a selected parcel and its documents in a package. This function is disabled when sending via the Retrieve object.
Folder	Places a selected folder and its documents in a package. This function is enabled only when sending via the Retrieve object.
Document	Places a selected document in a package. This button is always enabled.
Send to Local User	For package recipients located on a local area network. When a recipient opens the package, the system finds the documents on the network.

3. To finish creating the package, click **OK.**
4. To close the window, click **Close.**

   If you click **Close** without clicking **OK,** no parcels, documents, or folders are added to the package.

5. If you want to add items to the package or send the package to another user, close the **Package Generation** window.

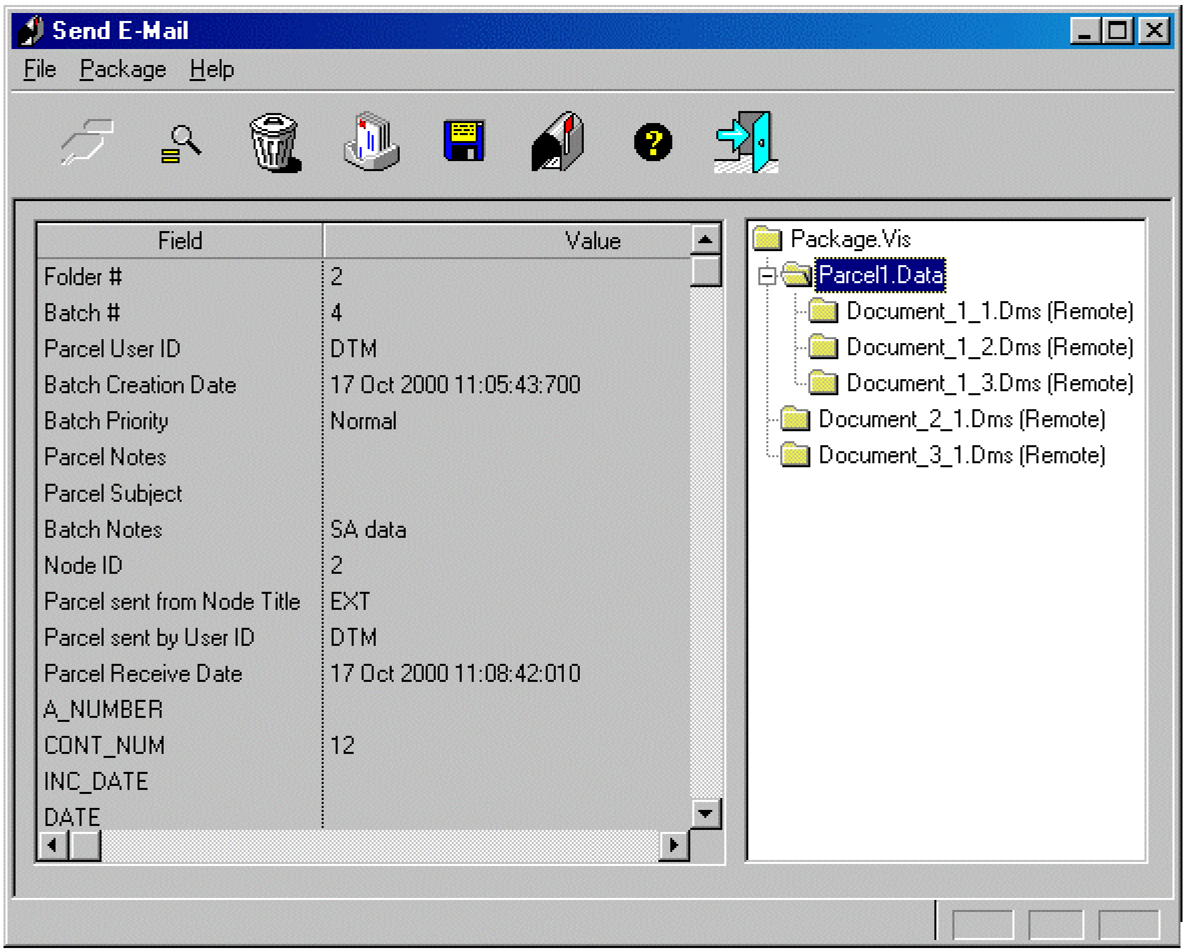


Figure 37: Send Email window with data

In the **Send Email** window, the table beneath the button bar displays the data of the object to be sent. The **Field** column displays the associated fields of the selected table.

For example, if you select a parcel under the `Package.Vis` folder, the fields listed are the fields in the BATCHPARCEL table. If a document is selected, the fields are the fields in the DOCUMENT table. If a folder is chosen, the fields in the FOLDER table are listed.

The **Value** column displays the value assigned in each field for the selected parcel, document, or folder.

The display on the right shows the `Package.Vis` folder, which is the container for the email package. As parcels, documents, and folders are selected, additional subfolders are displayed as part of the package. If only one parcel, document, or folder is selected, it is displayed in the next level beneath the `Package.Vis` folder.

Documents contained in selected parcels or folders are displayed one level down. Expand the parcel or subfolder to view them.

6. To open your email client, click **Send.**

   After you finish creating a package, the email client window must already contain the package of parcels, documents, and folders along with Exigen Workflow database information.

   If several profiles are set on your computer the **Choose Profile** window appears.

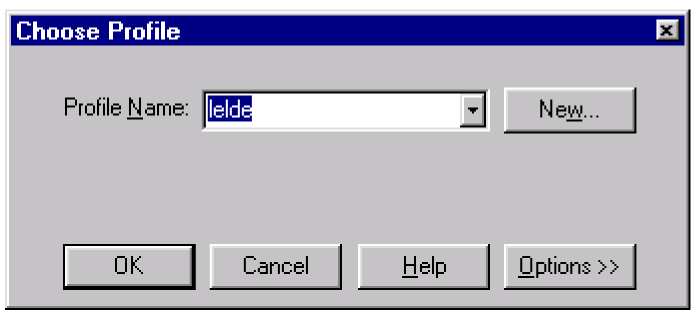


Figure 38: Choose Profile window

7. Select the email profile you want to use to send the package.
8. To add a profile, click **New.**
9. Add a profile using the standard **Inbox Setup Wizard** for the email system.

Send Email Window Options

The following table describes additional operations in the **Send Email** window:

Send Email options	
Option	**Description**
Connect	Establishes a connection to Exigen Workflow if one does not already exist. This can occur when the `email.exe` file is started independently of Exigen Workflow. Open a workflow object and click **Connect** to connect the applications. This button

Send Email options	
Option	**Description**
	is disabled if a connection already exists. It is recommended that the connection be established with the **Send Email** option in the workflow object rather than establishing it independently.
Clear	Removes all parcels, documents, and folders from the package.
Delete	Deletes the selected parcel, document, or folder from the package.

Copying and Exporting Documents

Exigen Workflow documents can be copied from the Exigen Workflow repository and exported as files.

The following file types can be copied and exported:

- DMS files
- standard task documents

The following file types cannot be copied and exported:

- Exigen Report Management (ERM) documents
- Exigen E-Forms documents
- Exigen E-Mail documents
- documents committed to permanent storage

For information on documents committed to permanent storage, see Chapter 8: Committing Documents.

Folders and subfolders with restricted access can be copied only by users with appropriate access rights.

Note: For more information on access rights, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow, Specifying Access Levels.

To export Exigen Workflow documents to Windows Explorer, proceed as follows:

1. In Exigen Workflow, open the workflow object containing the documents to export.

   The workflow object must have the copy and export function. The following workflow objects provide the copy and export function:

   - High Volume Index
   - Low Volume Scan
   - Inspect
   - Retrieve
   - Work Item Submitter
   - Queue
2. To select one document to copy and export, click the appropriate document.

3. To select several documents to copy and export, hold down **SHIFT** and click the first and last documents.
4. To select several documents that are not adjacent, hold down **CTRL** and click the documents to be copied and exported.
5. Select **Edit > Copy/Export Document** or press **CTRL+C.**

   All selected documents are copied to the clipboard. If the copied documents are DMS files, they are converted to TIFF files and annotations are merged.

   If the selected documents do not exist or the file type cannot be copied, an error message appears.
6. If the error message indicates that none of the documents can be copied, to cancel the copy operation, click **Cancel.**
7. If the error message indicates that at least one of the documents can be copied, to continue with the copy operation, click **Continue.**
8. To select a target directory for the copied documents, open Windows Explorer and open a directory.
9. Select **Edit > Paste**, press **CTRL+V,** or right-click and select **Paste.**

   The documents are pasted into the Windows Explorer directory.

Note: Documents are copied and exported without indexing information.

Sorting Parcels and Documents

Parcels in the queue can be sorted using the following two methods:

- Sorting Related Parcels
- Sorting Parcels Using the Sort Function

Sorting Related Parcels

The **Related Parcels** option in the **View** menu groups all parcels indexed to the same folder in a list. To group all parcels indexed to the same folder, proceed as follows:

1. Highlight the parcel for which you want to see related parcels.
2. Select **View > Related Parcels.**

Sorting Parcels Using the Sort Function

To sort parcels using the Sort function, proceed as follows:

1. To open the Sort window, proceed with one of the following:

- In the parcels area, point and right-click. Select **Sort…**
- Select **View > Set Sort Order > Parcels.**

  The **Sort** window appears.

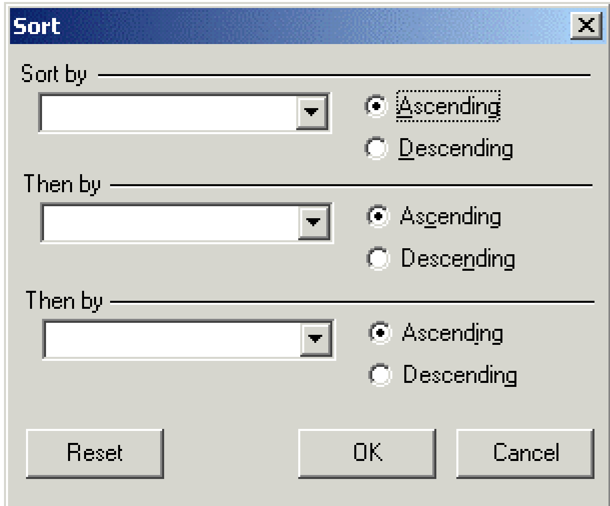


Figure 39: Sort window

2. Select the field to sort by.

   The **Sort By** and **Then By** submenus list all fields that are displayed in the parcel table. The parcels are sorted first by **Sort By** values and then by **Then By** values.

3. To change the sort order, click either **Ascending** or **Descending.**
4. To revert to the default sort order, select **Reset.**
5. To sort documents, follow the same steps as for parcels.
6. To save a sort setting, select **File > Save Configuration.**

Maintaining Document Details

Exigen Workflow allows you to assign document details. The document detail level is used to provide additional document information, such as document properties.

To enable the document detail feature, a custom field, or several fields for value storage, must be added to the DOCDETAIL table using Project Builder. For more information on adding custom fields, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects.

The following topics are described in this section:

- Modifying Document Details
- Adding a New Document Detail

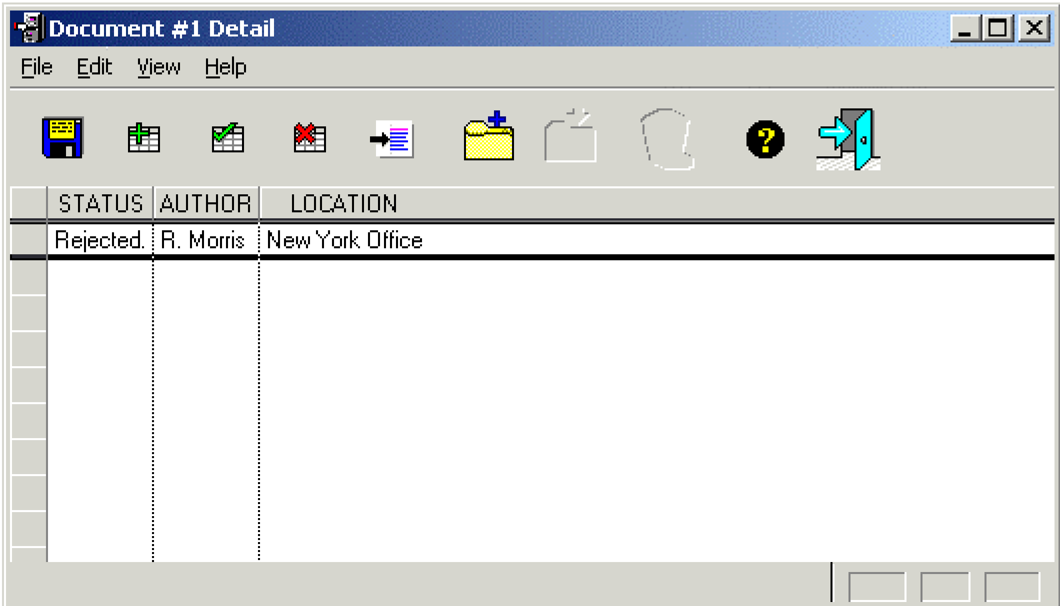
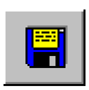
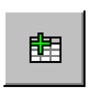
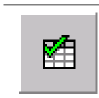
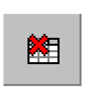
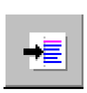
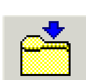
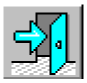


Figure 40: Document Detail window

The following table describes **Document Detail** window buttons:

Document Detail window buttons	
Button	**Description**
	Saves the current configuration in the **Document Detail** window.
	Adds a new record if the **Document Detail** window is in document detail edit mode. If the window is in document detail edit mode, the button opens the **Add a new detail** window as described in Adding a New Document Detail.
	Modifies the selected document detail record.
	Deletes the selected document detail record.
	Displays the document in the Image Viewer.
	Switches the **Document Detail** window to edit mode, to edit document details directly in the main window. In edit mode, pressing **TAB** or **SHIFT+TAB** moves the cursor between fields.
	Saves changes made to document details in edit mode. This button is disabled if the **Document Detail** window is not in edit mode.
	Returns the **Document Detail** window to view mode without applying changes made in edit mode. This button is disabled if the **Document Detail** window is not in edit mode.

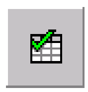
Document Detail window buttons	
Button	**Description**
	Opens online help.
	Closes the **Document Detail** window.

Modifying Document Details

To modify document details, proceed as follows:

1. To access the **Document Detail** window, right-click a document and select **Show document detail.**

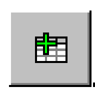
   The **Document Detail** window appears, listing all document detail records.

2. To modify a document detail, click  and change the document detail information.

3. To save changes, click .

Adding a New Document Detail

To add a new document detail, proceed as follows:

1. In the **Document Detail** window, click **Add a new detail** **.**

   The **Add a new detail** window appears.

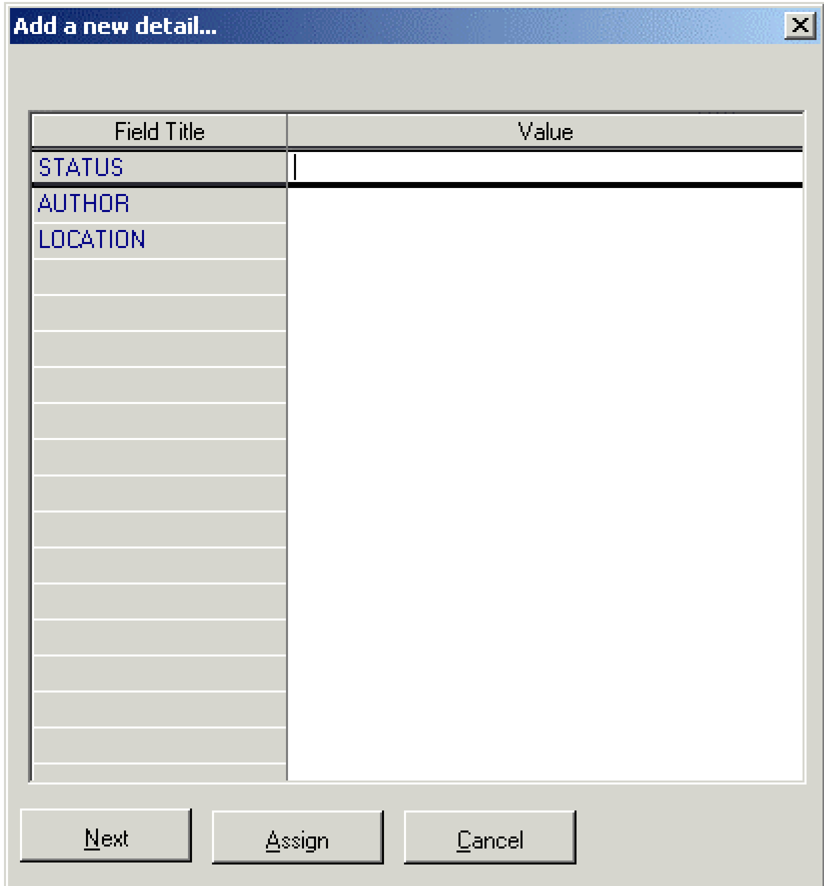


Figure 41: Add a new detail window

2. Enter data as appropriate in document detail fields.
3. You can move to the next field by pressing **TAB** or move back by pressing **SHIFT+TAB.**
4. In the **Add a new detail** window, perform appropriate tasks as described in the following table:

Add a new detail window buttons	
Button	**Description**
Next	Saves the new document detail and clears the fields to add the next document detail.
Assign	Saves the new document detail and closes the window.
Cancel	Closes the window without applying changes.

Viewing Individual Statistics

Exigen Workflow keeps statistical information regarding the number of parcels and documents processed by each queue and user.

To view the statistics for the current queue and user combination, select **View > My Statistics.**

The **My Statistics** window appears with a list of the number of parcels, documents, and pages processed for each date the queue was accessed.

Connecting to an External Application or Host Session

To assign an external application or **Host Session** when the High Volume Index queue is opened, proceed as follows:

1. Select **Work > Define Queue Settings** and select the **Scripts** tab.
2. Select one of the following options:

Scripts options	
Option	**Description**
Object+Node+Wflow+User	External application is available for use only by the current user of the current object in the current node of the current workflow. Narrow scope.
Object+Node+Wflow	External application is available for use by all users of the current object in the current node of the current workflow. Medium scope.
Object	External application is available for use by all users of the current object in all nodes of all workflow applications. Broad scope.

3. Click the browse button next to **Host Program Name.**
4. Locate the applicable executable and click **Apply.**
5. Under **Host Script Name,** locate the script file, if applicable, that starts the executable.
6. Click **Apply** and close the **Define Queue Settings** window.
7. To start the executable, select **File > Activate Host Session.**

If you must start the executable each time the queue is opened, set automatic loading. To set automatic loading in the Workflow Builder, proceed as follows:

1. Right-click on the node and select **Node Properties.**
2. Select **Form.**
3. Select **Auto load.**

Specifying Document, Folder, and Subfolder Security Settings

In the access control list (ACL) based security scheme, the administrator performs preparatory tasks for security designation, and a user with appropriate access rights assigns security to individual documents, folders, and subfolders in the node.

Two preconditions must be fulfilled before a user can assign security in a node:

- ACL based security must be activated.
- The user must be assigned appropriate security access rights.

  For information on activating ACL based security, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects, Security Tab.

  For information on setting security access rights, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects, Security Tab.

Security can be defined for documents, folders, and subfolders in all workflow nodes except High Volume Scan.

To modify security settings, proceed as follows:

1. In the node window, select the appropriate object.
2. To specify security for a document, select **Edit > Security > Document.**

   The **Modify Document** window appears.
3. To specify security for a folder, select **Edit > Security > Folder.**

   The **Modify Folder** window appears.
4. To specify security for a subfolder, select **Edit > Security > Subfolder.**

   The **Modify Subfolder** window appears.

Note: Default subfolders are shared objects, so their security settings are global within the project. Changes in default subfolder access rights affect default subfolders in all folders.

The following tabs are available:

- General Tab
- Privileges Tab
- Groups and users Tab

General Tab

The **General** tab defines general access and security settings for documents, folders, and subfolders.

1. To provide full access to all users, in the **General** tab, in the **Set access** section, select **Public.**

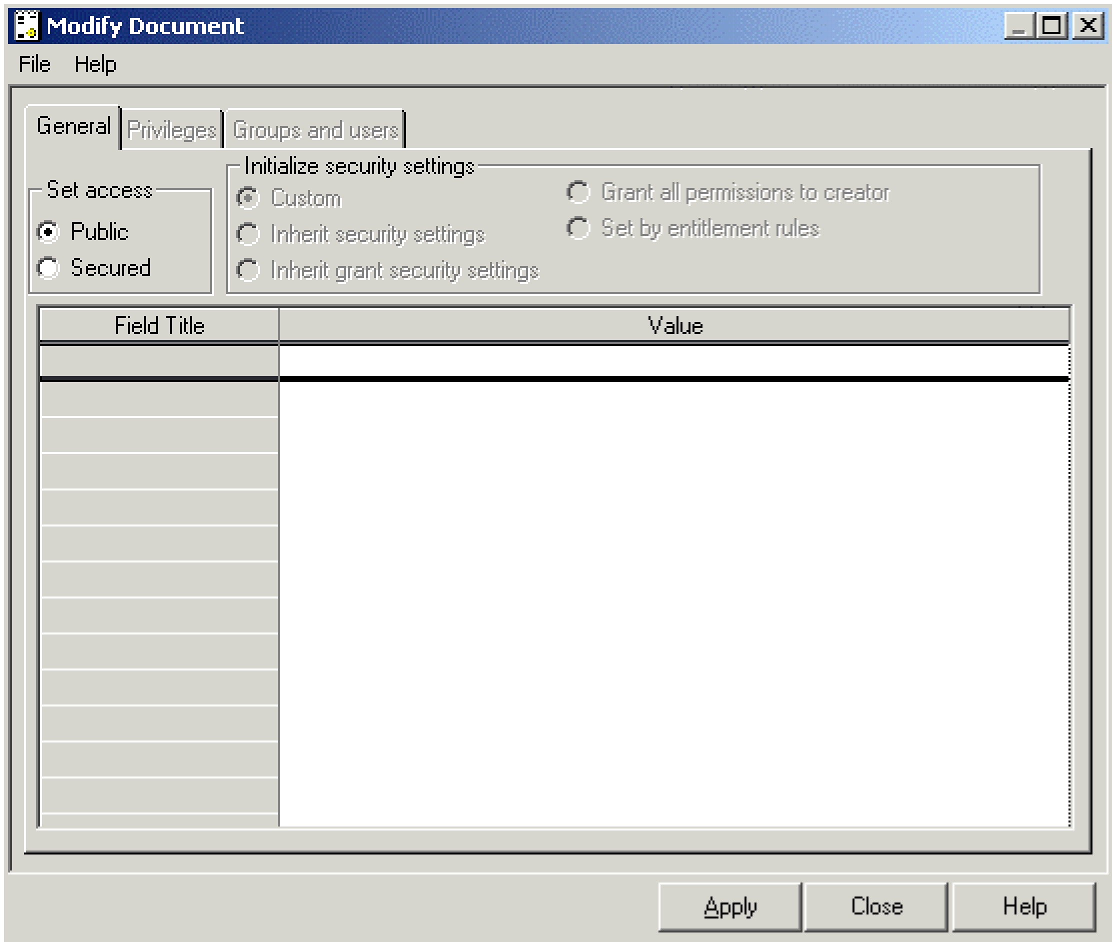


Figure 42: Specifying document security

The selected document or folder is accessible to all users. All users have the following permissions for the document or folder:

- read
- modify
- delete
- view
- edit

However, users are not automatically granted permission to create a child object, such as a subfolder or document, or to grant security for the object.

2. To restrict permissions, select **Secured.**

   If **Secured** is selected, the **Initialize security settings** section is enabled. It is used to select a security definition option.

3. To define security, in the **Initialize security settings** section, select one of the following options:

Initialize security settings options	
Name	**Description**
Custom	Defines custom security. The security assignment window is not populated with predefined options.
Inherit security settings	Populates security assignment window with the same access control list as for the parent object. For example, a subfolder inherits settings from its folder. Only those privileges that are applicable to the object type are inherited.
Inherit grant security settings	Populates security assignment window only with the parent object's grant right access control entries.
Grant all permissions to creator	Populates security assignment window with all permissions: • read • modify • delete • view • edit • hide • create child • grant security
Set by entitlement rules	Populates security assignment window according to predefined entitlements.

Privileges Tab

The **Privileges** tab specifies and describes privileges for accessing documents, folders, and subfolders.

To define privileges, proceed as follows:

1. Select the **Privileges** tab.
2. To add a privilege, click **Add.**

   The **Add Privileges** window appears.

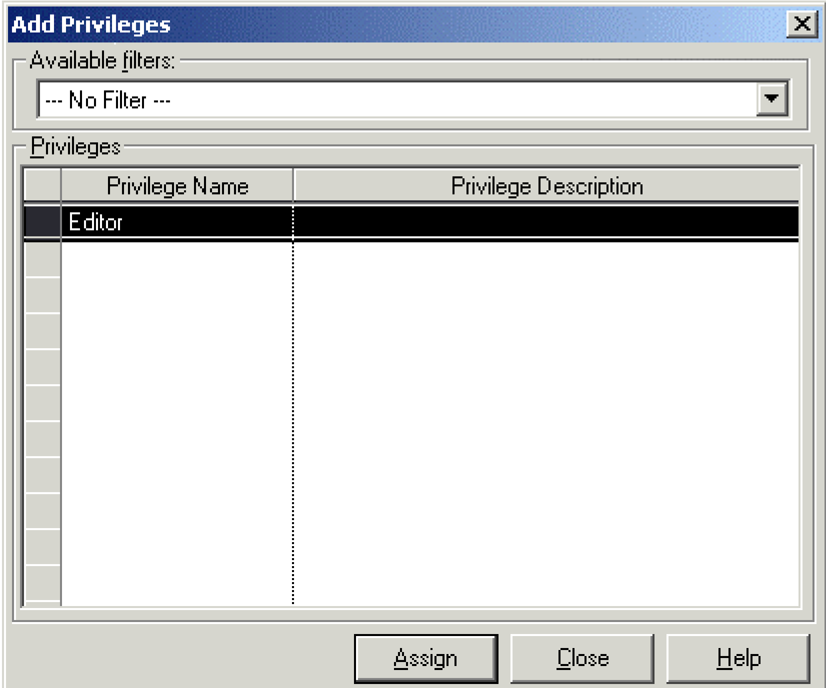


Figure 43: Adding a privilege

3. In the **Available filters** field, select a filter to apply.
4. To apply the selected filter, click **Assign.**
5. To close the window, click **Close.**
6. To remove a privilege, in the **Privileges** tab, select the privilege and click **Delete.**
7. To remove all privileges, click **Reset.**

Groups and users Tab

The **Groups and users** tab specifies permissions for global groups and users.

To define permissions for global groups, proceed as follows:

1. Select the **Groups and users** tab.

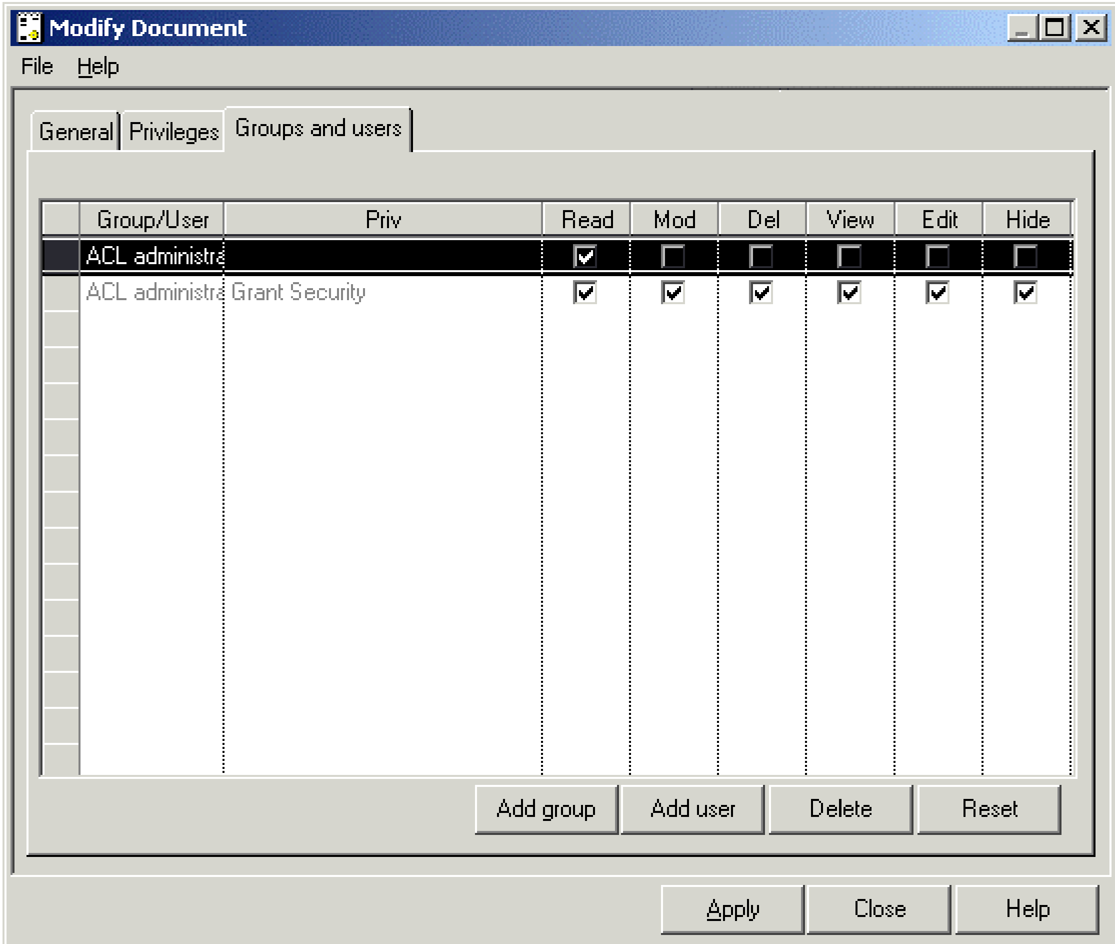


Figure 44: Defining permissions for global groups and users

2. To add a global group, click **Add group.**

   The **Add Group to Document ACL** window appears.

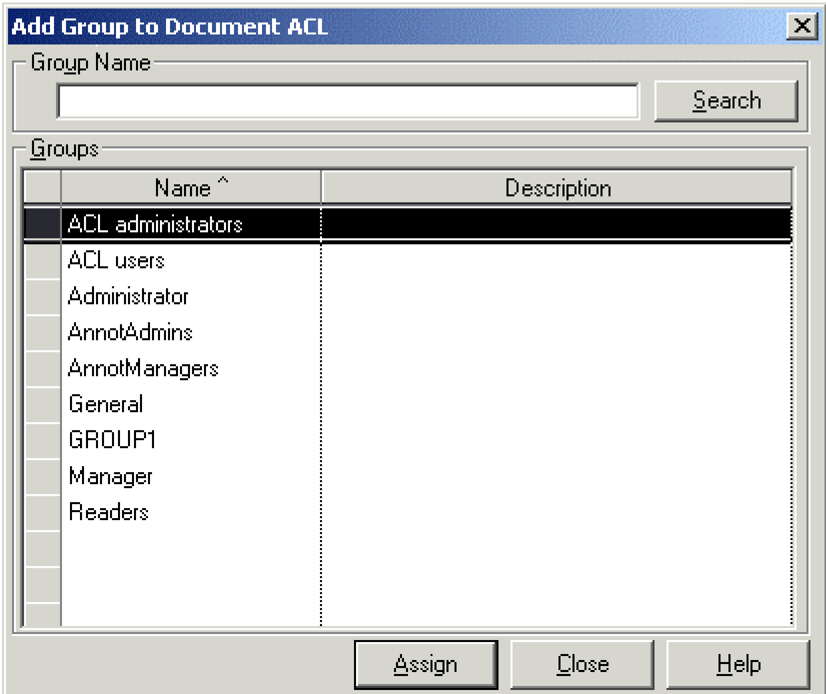


Figure 45: Adding global groups

3. To search for a global group to add, in the **Group Name** field, enter search values.

   For example, to search for administrator groups, enter *Admin.*

4. Click **Search.**

   The first group retrieved by the search is highlighted.

5. To search for a global group without using **Search,** position the cursor in the **Groups** table and enter the first letters of the group to search for.

   The first group retrieved by the search is highlighted.

6. To assign permissions to a global group, in the **Groups** table, select the group.
7. Click **Assign.**

   The global group appears in the **Groups and users** tab.

8. To close the window without assigning a global group, click **Close.**
9. To specify permissions for the global group, in the **Groups and users** tab next to the global group name, select the appropriate permissions.

   For example, **Read, Mod,** or **Del** can be selected.

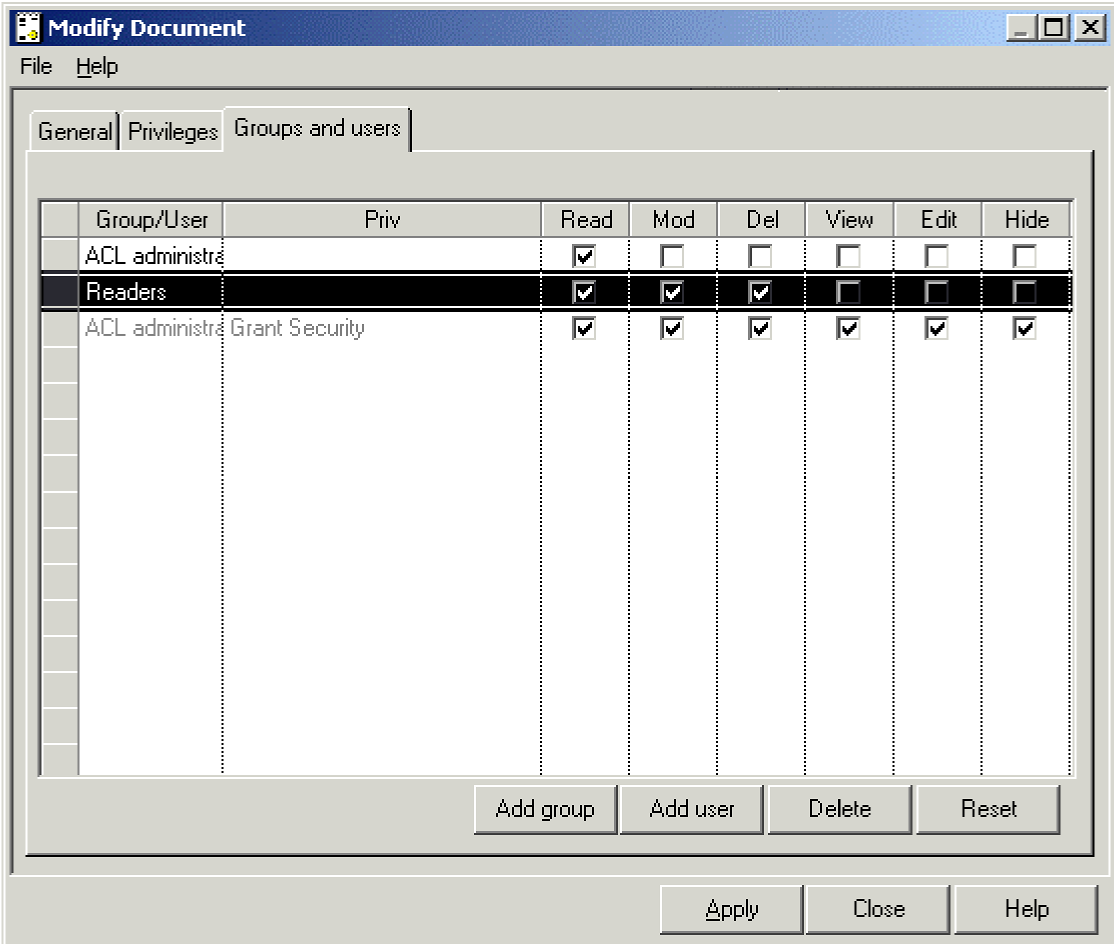


Figure 46: Assigning permissions to a global group

10. To remove a global group, select the group and click **Delete.**
11. To remove all groups, click **Reset.**

To define permissions for a user, proceed as follows:

12. Click **Add user.**

    The **Add User to Document ACL** window appears.

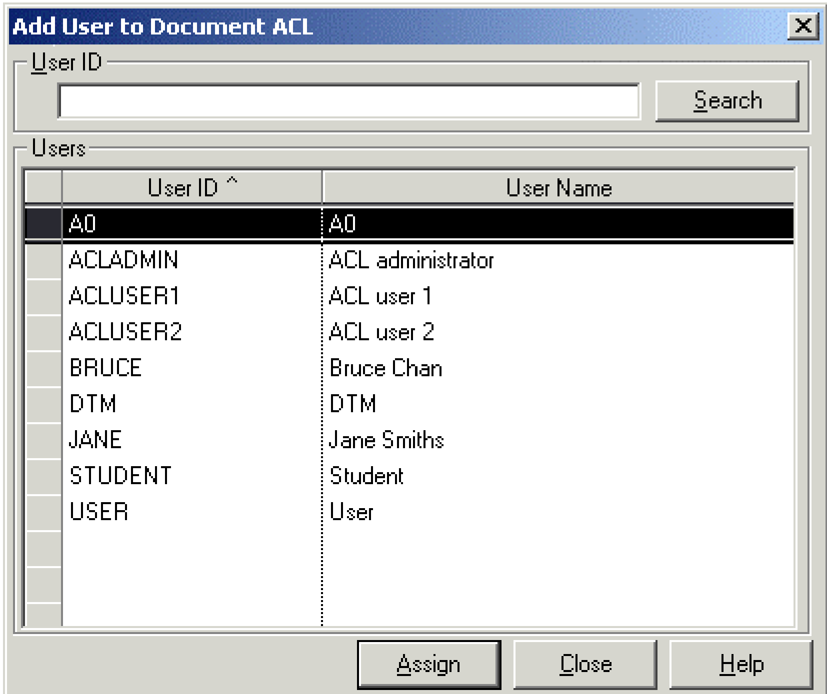


Figure 47: Adding a user

2. To search for a user to add, in the **User ID** field, enter search values.
3. Click **Search.**

   The first user retrieved by the search is highlighted.

4. To search for a user without using **Search,** position the cursor in the **Users** table and enter the first letters of the user to search for.

   The first user retrieved by the search is highlighted.

5. To assign user security permissions, in the **Users** table, select the user.
6. Click **Assign.**
7. To close the window without assigning permissions, click **Close.**
8. To specify permissions for the user, in the **Groups and users** tab, select appropriate permissions.

   For example, **Read, Mod,** or **Del** can be selected.

9. To remove a user, select the user and click **Delete.**
10. To remove all users, click **Reset.**
11. To save the changes, click **Apply.**
12. To close the window without saving changes, click **Close.**

Viewing Inaccessible Parcels

In the ACL security scheme, situations can arise when a user has a parcel assigned but the user cannot access the parcel due to security restrictions. It is possible to view and route inaccessible parcels, but it is not possible to see documents in these parcels.

If the user has inaccessible parcels assigned, the following text appears in the **Total Displayed** section above the parcels list:

Inacc. par. (X)

where X is the number of inaccessible parcels assigned to the current user in this node.

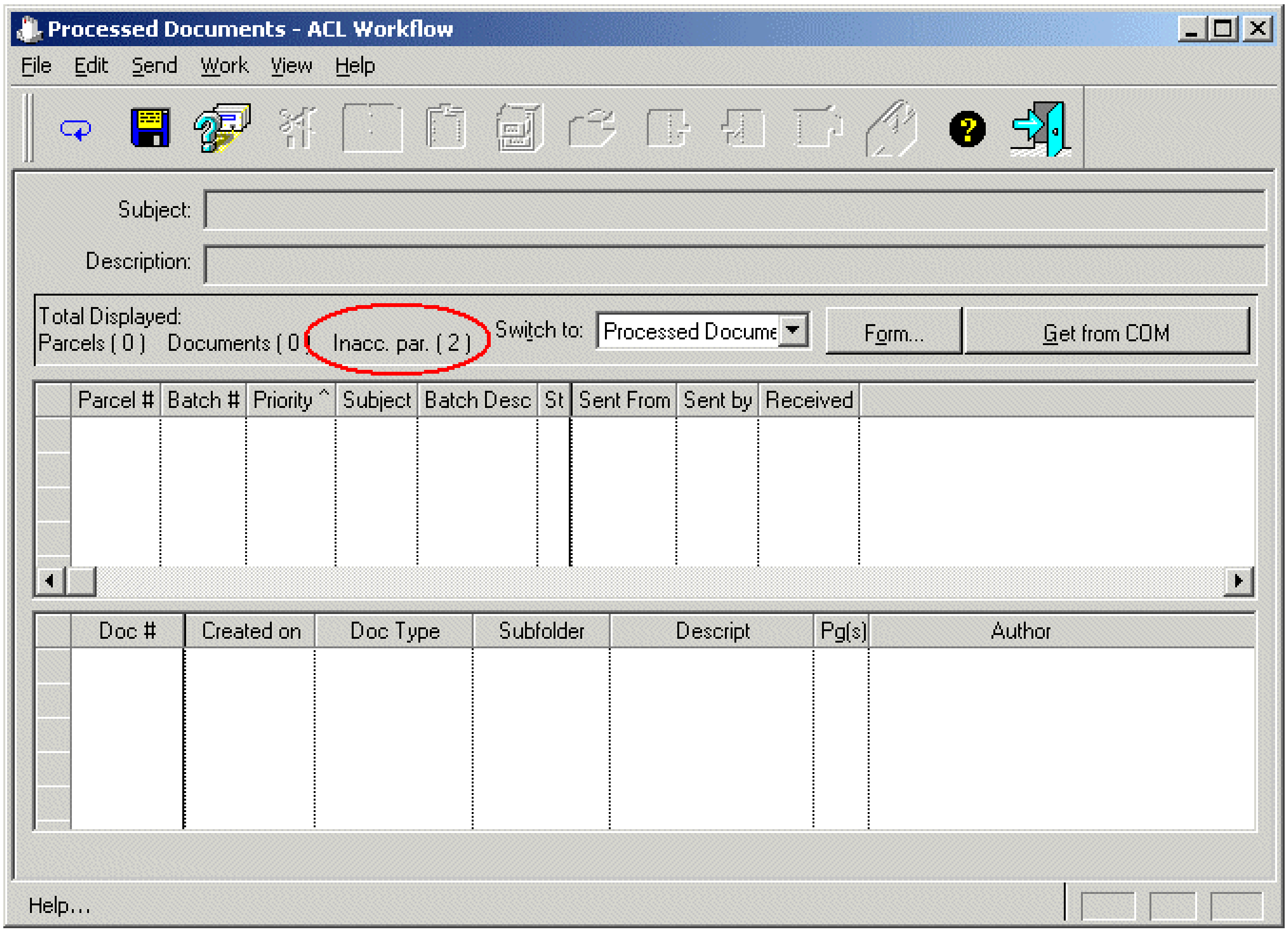


Figure 48: Inaccessible parcels indicator

To send inaccessible parcels to another user and node, proceed as follows:

1. Select **View > View Inaccessible Parcels.**

   The list of inaccessible parcels appears.

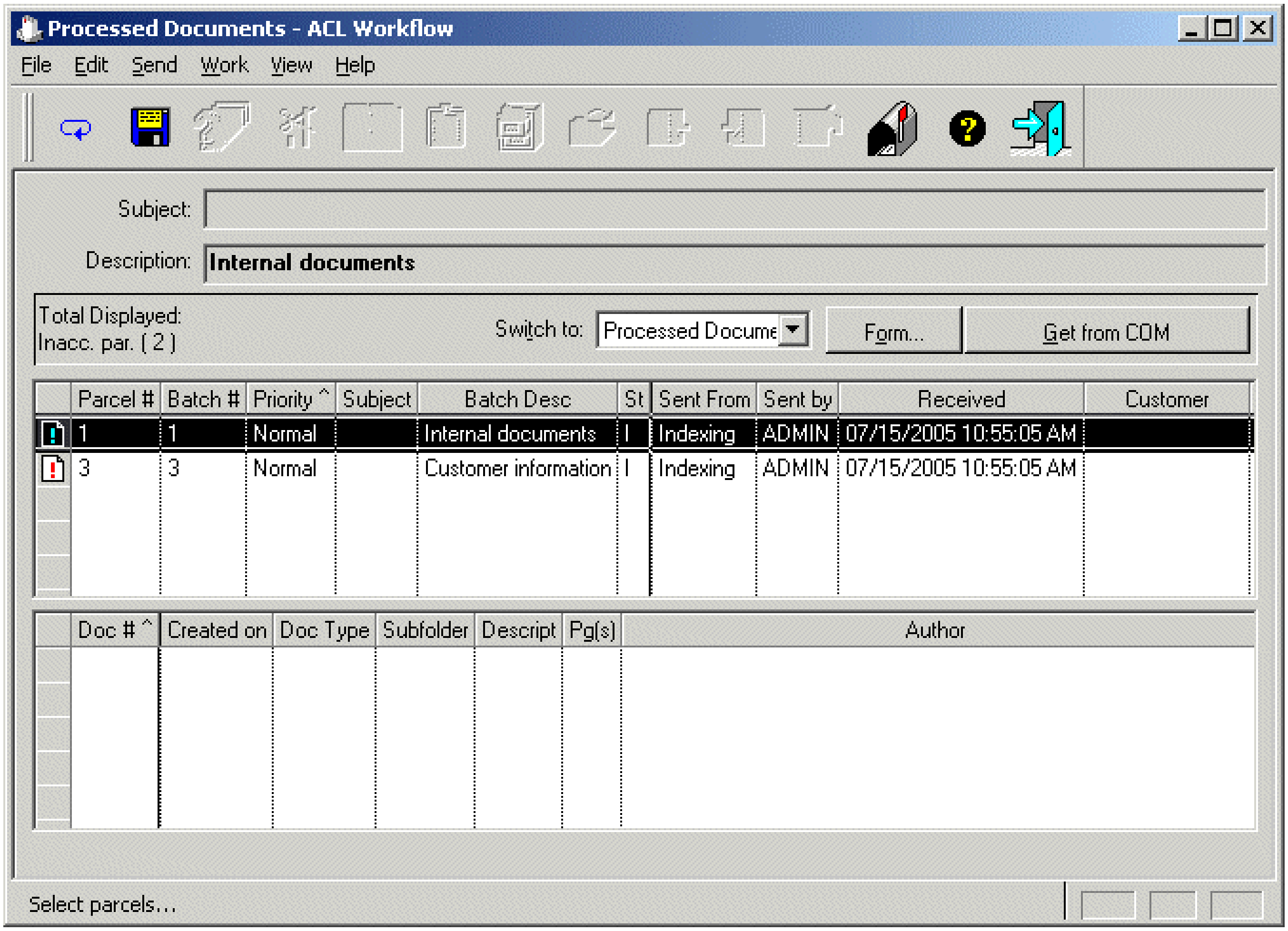


Figure 49: List of inaccessible parcels

2. To send inaccessible parcels to another node and user, follow instructions as described in Sending Parcels or Documents.
3. To return to the list of parcels the user can access, click **Refresh List.**

Chapter 5: Low Volume Scanning

This section describes how to use the Low Volume Scan workflow object to convert small quantities of paper documents into computer document images. It also describes how to index the documents once they are in the Low Volume Scan queue.

The following topics are described in this section:

- Overview
- Low Volume Scanning Basics
- Working with Documents, Batches, and Parcels

Overview

This section describes the functionality of the Low Volume Scan workflow object.

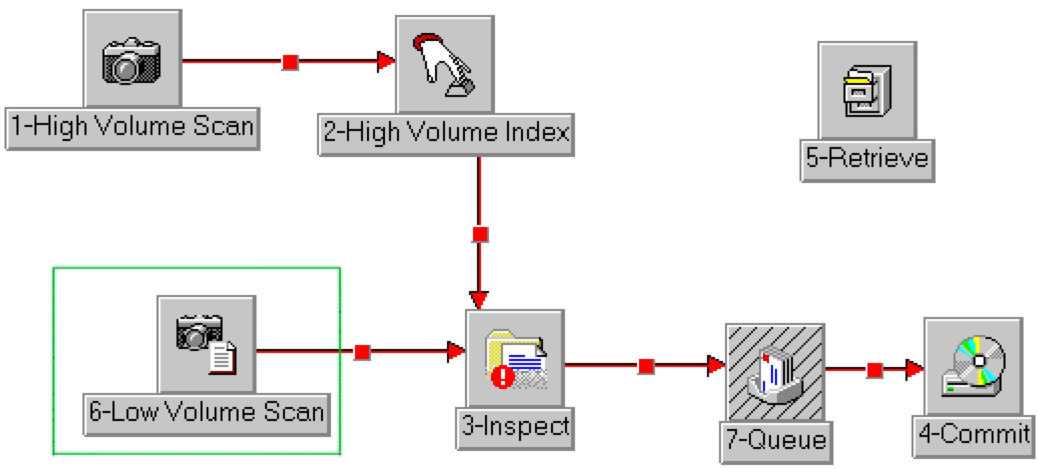


Figure 50: Basic workflow diagram with the Low Volume Scan object

The Low Volume Scanning workflow object combines the functionality of the High Volume Scanning and High Volume Indexing objects, but applies this functionality to small quantities of documents.

Low Volume Scanning Basics

The following topics are described in this section:

- Low Volume Scanning
- Low Volume Scan Window

Low Volume Scanning

The following topics are described in this section:

- Preparing to Scan Documents
- Preparing for High Volume Indexing
- Implementing Low Volume Scanning

Preparing to Scan Documents

Perform the following preliminary steps before scanning documents:

1. To set up the scanner, perform the following tasks:
   - Configure the scanner.
   - Adjust the scanner settings.
   - Select a scan engine.

   For information on scanner configuration settings, see the system administrator or scanning documentation.
2. Remove all paper clips and staples from documents.
3. Turn on the scanner.
4. Assemble pages into documents.
5. Assemble documents into batches.
6. Place the documents in the ADF.

Preparing for High Volume Indexing

The following preliminary tasks are performed before using high volume indexing:

1. The system administrator must specify indexing fields. At least one field must be defined in the folder table.
2. Depending on the project type, the user can specify the folders and subfolders that are assigned to a parcel. You can use existing folders and subfolders or create new ones.

   Note that the system administrator creates document types and assigns document types to subfolders. Some restrictions may apply if a document types list is defined for subfolders in Project Builder.

For more information on indexing fields, folders, and subfolders, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects.

Implementing Low Volume Scanning

To implement low volume scanning procedures, proceed as follows:

1. In Exigen Workflow Explorer, double-click the **Low Volume Scan** icon.

The **Low Volume Scan** window appears. For more information on low volume scanning, see Low Volume Scan Window.

2. In the **Low Volume Scan** window, select **Scan > Select Scan Engine.**

   The **Select Scan Engine** window appears.

3. Select a scan engine and click **Apply.**
4. In the **Low Volume Scan** window, click **Scan Batch.**

   The **Scan Dialog** appears on the left, and the Image Viewer appears on the right. For information on the **Scan Dialog,** see Scan Dialog Window. For information on the Image Viewer, see Chapter 11: Image Viewer*.*

5. In the **Scan Dialog,** adjust the scanner settings.
6. Place the pages of your documents in the ADF, and click **Scan,** or type **F3.**

   When the ADF runs out of paper, a warning appears.

7. To continue scanning pages into the current document, click **Yes.**
8. If you want to start scanning a new document or close the current batch, click **No.**
9. When you have scanned all documents, to close the batch, click **Close Batch.**

   For information on document scanning, see Scanning Documents.

10. To specify the properties of the Low Volume Scan queue **Select Work > Define Queue Settings.**

    For information on defining queue properties, see Defining High Volume Index Queue Properties.

11. Assign a parcel to an existing folder or to a new folder.

    For information on assigning a parcel, see Assigning a Parcel to an Existing Folder and Assigning a Parcel to a New Folder.

12. Index a parcel further by assigning a document type and a subfolder.

    For information on indexing a parcel, see Filing Documents into Subfolders and Assigning Document Types.

13. To send indexed parcels to the next queue in the workflow, click **Send.**

    The **Send Manager** window appears.

14. Specify a queue and user to which you are sending the parcel. You can also enter a description and set a priority.

    For more information on Send Manager, see Sending a Batch from the High Volume Scan Queue Using Send Manager in Chapter 3: High Volume Scanning.

    The **Send** button is available only if you have filled in all required index fields.

Low Volume Scan Window

The **Low Volume Scan** queue contains the features required for low volume scanning. In this queue, the user scans a batch of documents and indexes them before sending them to the next queue in the workflow.

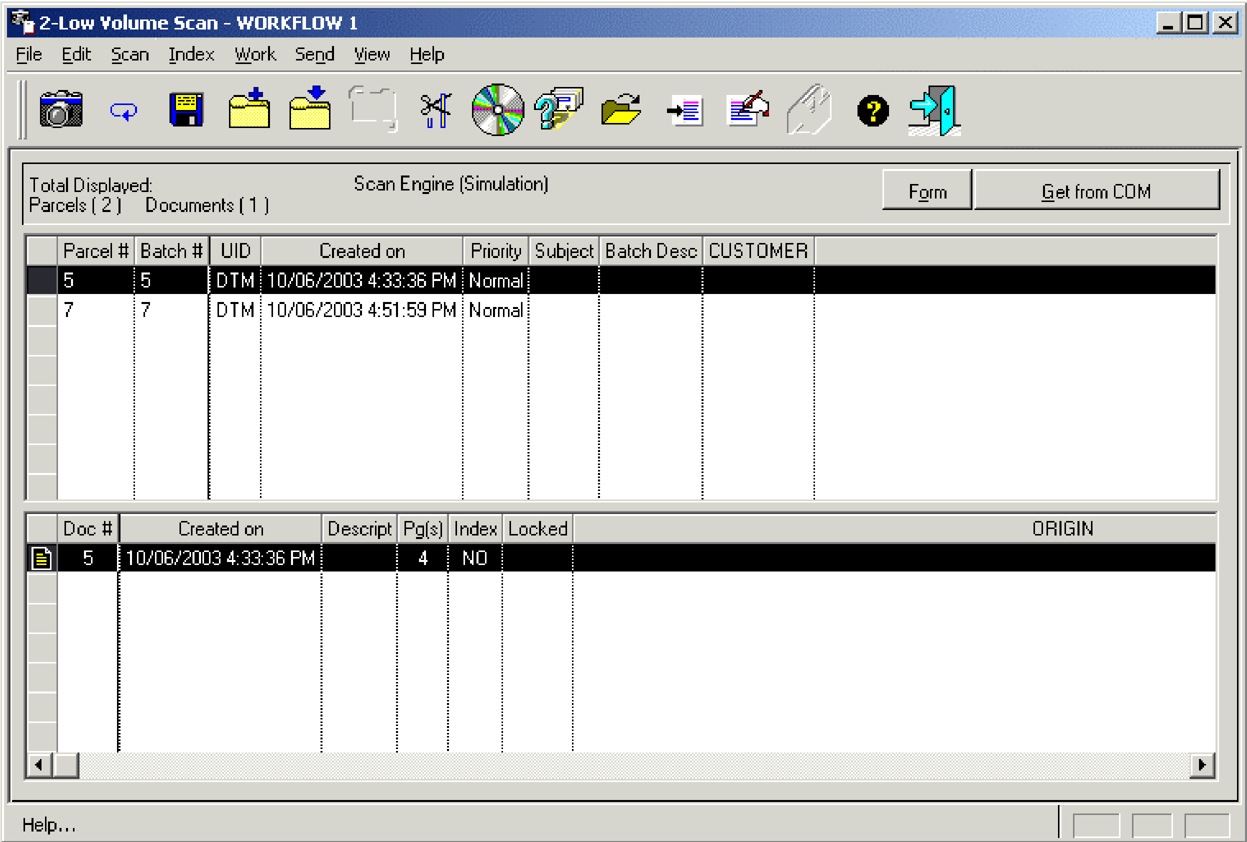


Figure 51: Low Volume Scan window

The **Low Volume Scan** window has the following sections:

Low Volume Scan window	
Feature	**Description**
Menu and button bars	Contain functions and utilities in the Low Volume Scan queue as described in Appendix A: Exigen Workflow Menus and Buttons. If no batches are in the queue, the batch and document-specific buttons menu options are disabled.
Information line	Displays parcel, document, and common queue information. Number of parcels currently displayed in the queue, the number of documents within the selected parcels, and the Scan Engine being used.
Parcel/batch table	Lists all parcels or batches in the queue.
Document table	Lists all documents assigned to the selected parcel/batch. Documents displaying a **Y** in the **Locked** column are checked out for editing.

The window displayed corresponds to the Folder/Subfolder/Document database structure in the **Project Configuration** window of the Administrator application. Other possible database structures are Folder/Document and Folder.

The middle portion of the window lists the parcels, and the lower portion lists the documents within the selected parcels. The column headings in each portion differ based on the system configuration and can include custom fields.

If a document is opened, the focus can be on the **Low Volume Scan** window or Image Viewer, depending on the configuration. The focus determines which window is initially activated and displays system messages.

The focus is set by the system administrator as described in the *Exigen Workflow Administration Guide, Part 1: Design and Configuration,* Chapter 5: Designing a Workflow, Setting Viewer Focus.

Working with Documents, Batches, and Parcels

The following topic is described in this section:

- Retrieving Archived Documents for Revision

For additional information on working with documents, batches, and parcels, see the following sections:

- Searching for Batches or Parcels
- Creating a Reference Document
- Modifying Batch Attributes
- Adding a Document to a Batch
- Modifying an Existing Document
- Selecting Parcels in the Fix or Com Queue
- Splitting Parcels
- Creating a New Parcel
- Merging Parcels
- Deleting Parcels and Documents
- Editing Document and Parcel Fields
- Displaying the Contents of a Parcel
- Sorting Parcels and Documents
- Maintaining Document Details
- Sending Batches to the Fix Queue
- Viewing Individual Statistics

- Connecting to an External Application or Host Session
- Copying and Exporting Documents
- Appendix B: Document Versioning
- Specifying Document, Folder, and Subfolder Security Settings
- Viewing Document Properties

Retrieving Archived Documents for Revision

The following topics are described in this section:

- Retrieving Documents from Storage
- Retrieve Results Window

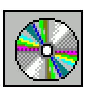
Retrieving Documents from Storage

The Retrieve from Storage function is available only in the **Low Volume Scan** window. It allows you to retrieve archived documents for revision.

Documents in permanent storage have a node identifier of 0 and cannot be modified unless retrieved with the **Low Volume Scan** window.

To retrieve documents from storage, proceed as follows:

1. Select **File > Retrieve Optical,** or click **Retrieve From Storage.**

   The **Retrieve From Storage** window appears.

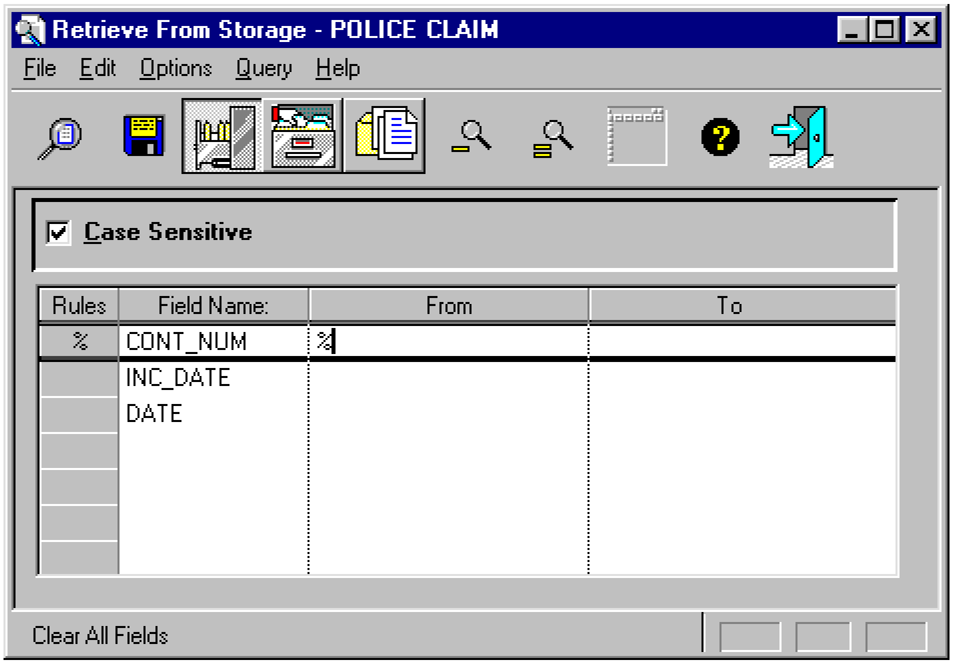
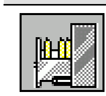
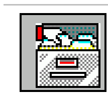
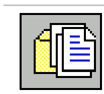


Figure 52: Retrieve From Storage window

2. To locate a folder or document, in the **Retrieve From Storage** window, enter search criteria.

   The query can be performed at the folder, subfolder, or document level depending on the fields used for the search. The title bar displays the search name.

3. To switch between modes and specify your query, click one of the buttons described in the following table:

Retrieve From Storage window buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Query > By Folder**	**CTRL+F**	**Query by Folder** Switches to the Query by Folder mode, which lists the folder fields that can be used in queries.
	**Query > By Subfolder**	**CTRL+S**	**Query by Subfolder** Switches to the Query by Subfolder mode, which lists the subfolder fields that can be used in queries.
	**Query > By Document**	**CTRL+D**	**Query by Document** Switches to the Query by Document mode, which lists the document fields that can be used in queries.

4. To specify your query, perform the following optional actions:
   - If the search must differentiate between upper and lowercase letters, select the **Case Sensitive** box.

Note: Whether the **Case Sensitive** check box is enabled or disabled depends on the database sensitivity and the selection of **Support Case Sensitive Indexes** during project configuration.

- In the **Rules** column, define the type of search with either an exact match, **=,** or with an approximate match, **%,** if the field type is character such as CHAR or VARCHAR. Change the symbol by clicking on it.
- If the field type is integer, use the **From** and **To** columns to set the minimum and maximum value for each field.
- If the field type is character, enter either the entire word **=** or a portion **%** in the **From** column.

The **To** column is disabled for character searches.

5. To execute the query, click **Find.**

If no records are found, the message **No Records Found** appears above the table. If records are found, the **Retrieve Folder/Subfolder/Document** window is replaced by the **Retrieve Results** window.

Note: After retrieval archived parcels have the **Optic** priority.

Retrieve Results Window

The **Retrieve Results** window displays all records that meet the search criteria. The results depend on the type of query performed. For example, if the query was performed on a folder field, only folder records are listed.

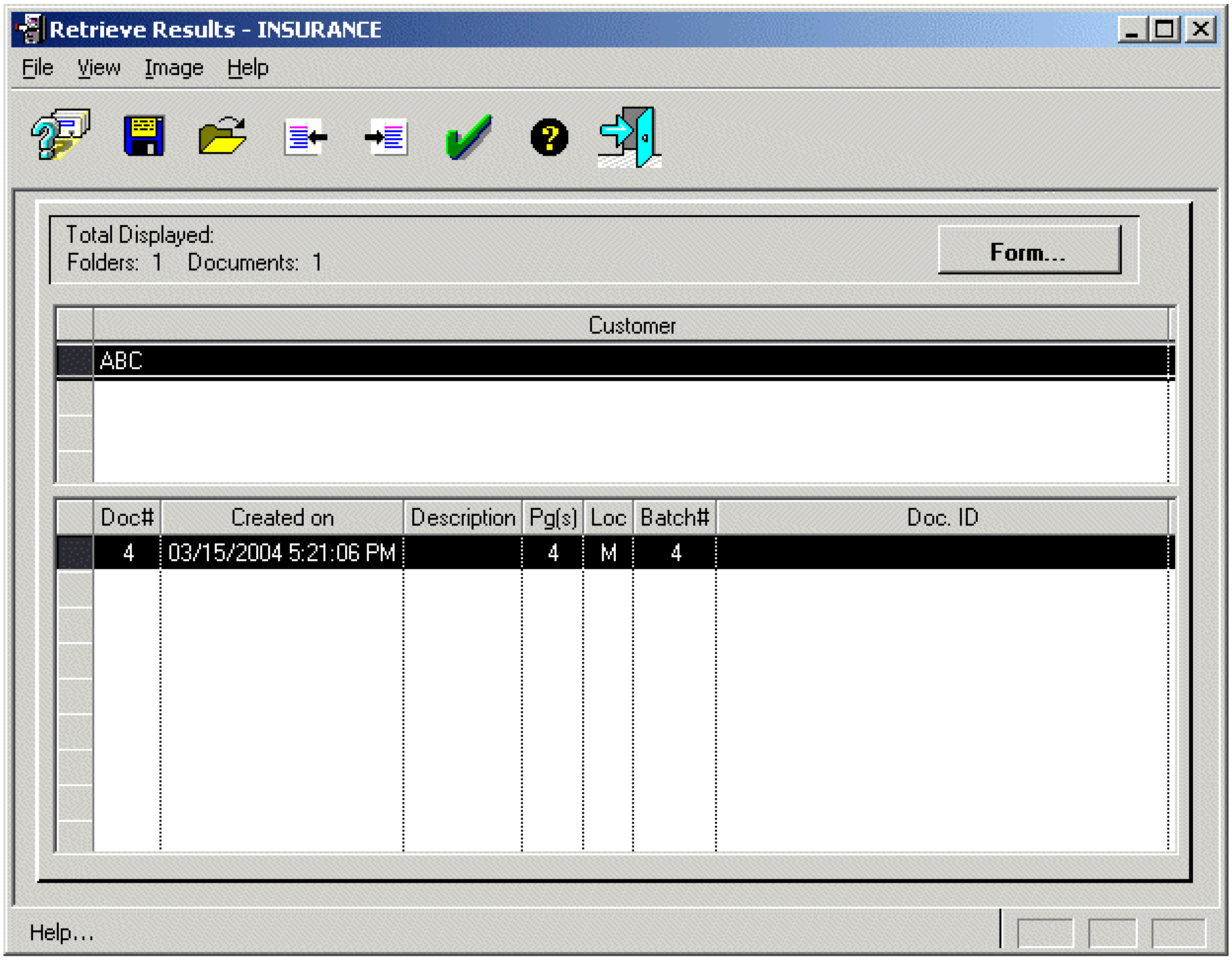


Figure 53: Retrieve Results window

The **Retrieve Results** window has the following sections:

Retrieve Results window	
Feature	**Description**
Menu and button bars	Correspond to available functions.
Information line	Displays the number of folder, subfolder, and document records found.
Tables	Display the folders, subfolders, and documents found.
Left Image Display	Displays a selected document in the Image Viewer on the left side of the window.
Right Image Display	Displays a selected document in the Image Viewer on the right side of the window.
Parcel View	Displays all documents in a selected folder.

Note: Right Image Viewer has more options such as access to Print Server and the Stamp Management Utility.

Retrieving a Document from the Retrieve Results Window to the Current Workflow

To transfer a document from the **Retrieve Results** window to the current workflow, proceed as follows:

1. In the **Retrieve Results** window, select the document.
2. Click **Transfer to Workflow** or select **File > Transfer to Workflow.**

   The document appears in the **Low Volume Scan** window.

   Revise or replace the document as required.

Chapter 6: Inspect/Quality Assurance

This section describes how to inspect the quality of a document image using the Inspect/Quality Assurance workflow object.

The following topics are described in this section:

- Overview
- Inspection Basics

Overview

This section describes the functionality of the Inspect workflow object.

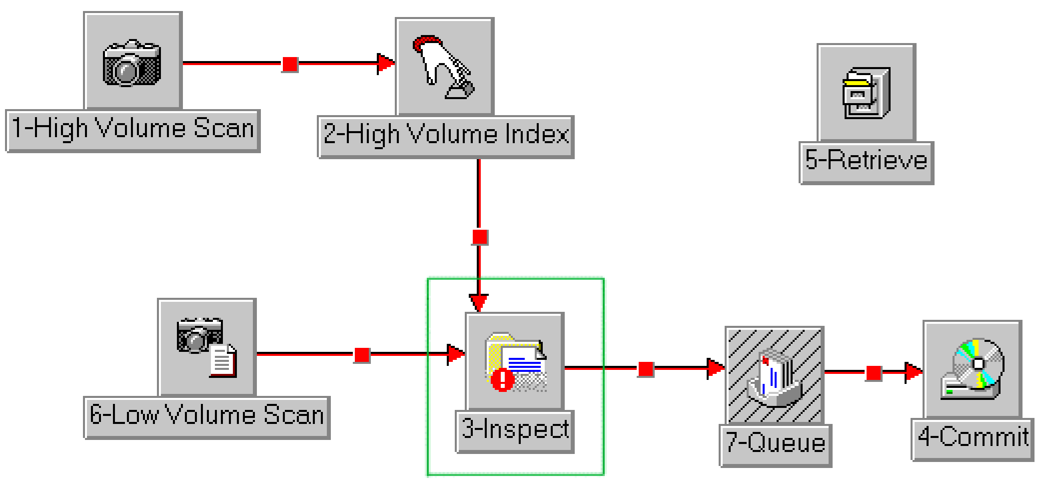


Figure 54: Basic workflow diagram with the Inspect object

The **Inspect** workflow object verifies that document images meet image quality requirements. Documents that have been scanned incorrectly or are of poor quality can be reviewed. The Inspect workflow object verifies folder, subfolder, and document type assignments.

Documents can be sent to the Inspect queue to verify if they meet the following criteria:

- every n^{th} document
- documents containing at least one page with a size smaller than X kilobytes
- documents containing at least one page with a size greater than X kilobytes

The Inspect queue can be assigned in the workflow, allowing all or selected documents to be inspected. The selection can be performed using routing rules based on folder, parcel, or document record attributes.

To facilitate quality assurance in the workflow process, the Inspect queue allows you to correct documents by rescanning or reindexing.

Note: New batches must be scanned into the system using the High Volume Scan or Low Volume Scan queues.

Inspection Basics

The following topics are described in this section:

- Inspection
- Inspect Queue Window
- Defining Inspect Queue Properties
- Clearing Reject Flags
- Adding a Document to a Parcel
- Displaying a Document
- Assigning a Parcel to an Existing Folder
- Assigning a Parcel to a New Folder
- Filing Documents into Subfolders and Assigning Document Types
- Sending Inspected Parcels to the Next Queue

For information on copying and exporting documents, see Copying and Exporting Documents.

For information on viewing document properties, see Viewing Document Properties.

For information on searching for batches or parcels, see Searching for Batches or Parcels.

For information on sorting Parcels and documents, see Sorting Parcels and Documents.

Inspection

The following topics are described in this section:

- Preparing to Inspect Documents
- Inspecting a Document

Preparing to Inspect Documents

The following preliminary tasks are performed before document inspection:

1. Documents must be scanned into Exigen Workflow using High or Low Volume Scanning.
2. The system administrator has specified the quality assurance criteria for scanned documents.

Inspecting a Document

To inspect a document, proceed as follows:

1. In Exigen Workflow Explorer, double-click **Inspect.**

   The **Inspect** window appears.

2. To change property settings for the Inspect queue, select **Work > Define Queue Settings.**

   For more information on defining queue settings, see Defining Inspect Queue Properties.

3. To review and correct any rejected documents, select **View > Right** or **Left Image Display.**
4. To rescan a document or single pages of a document, select either **Scan > Attach Document to Parcel,** or **Scan > Modify Document Pages.**

   For more information on modifying documents, see Adding a Document to a Parcel or Modifying an Existing Document.

5. If the document is processed through Barcode Server, to check if any errors occurred during barcode processing, proceed as follows:
   1. Select **Scan > Modify Document Pages.**

      The **Scan Dialog** window appears.

   2. To view the errors that occurred during barcode processing, click **Show Barcode Server Log.**

      If no **Show Barcode Server Log** button appears in the **Scan Dialog** window, no errors occurred during barcode processing, or the document is not processed through Barcode Server.

6. Clear all inspect flags.

   For information on clearing inspect flags, see Clearing Reject Flags.

7. If required, reindex using the **Index** menu options.
8. To send the inspected parcels to the next queue, click **Send.**

Inspect Queue Window

The **Inspect** window contains the features required for inspecting parcels and documents.

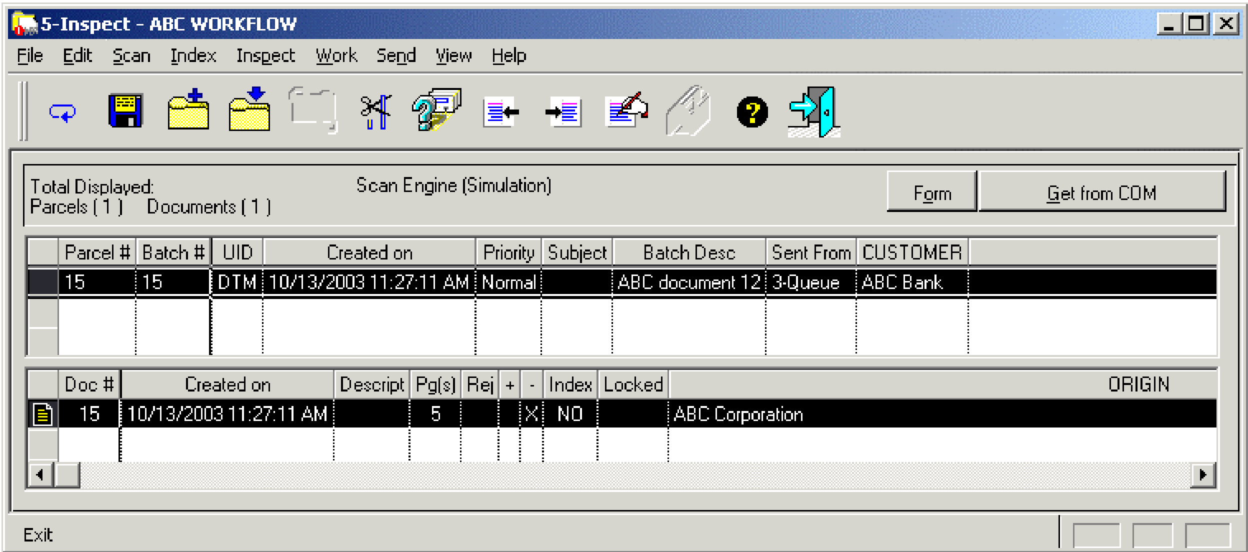


Figure 55: Inspect window

The **Inspect** window has the following sections:

Inspect window	
Name	**Description**
Menu and button bars	Contain functions and utilities in the inspecting queue. For more information on menus and buttons, see Appendix A: Exigen Workflow Menus and Buttons. If no batches are in the queue, the batch and document-specific buttons and menu options are disabled.
Information line	Displays parcel, document, and common queue information.
Parcel table	Lists all parcels in the queue.
Document table	Lists all documents assigned to the selected parcel.

The window displayed corresponds to the Folder/Subfolder/Document database structure in the Project Configuration window of the Administrator application. Other possible database structures are Folder/Document and Folder.

Documents marked with **X** in either the **+** or **–** columns are rejected because they exceed the maximum or minimum size.

Documents marked with **X** in the **Rej** column are rejected automatically by the **reject every n-th** feature.

Documents marked with **Y** in the **Locked** column are checked out for editing.

If a document is opened, the focus can be on the **Inspect** window or Image Viewer, depending on the configuration. The focus determines which window is initially activated and displays system messages.

The focus is set by the system administrator as described in the *Exigen Workflow Administration Guide, Part 1: Design and Configuration,* Chapter 5: Designing a Workflow, Setting Viewer Focus.

Defining Inspect Queue Properties

The **Define Queue Settings** dialog is used to set the properties for the Inspect queue. For information on setting the Inspect queue properties, see Defining High Volume Index Queue Properties in Chapter 4: High Volume Indexing.

Clearing Reject Flags

After a document is reviewed and is ready to be sent to the next queue in the workflow, to clear reject flags, proceed as follows:

1. In the **Inspect** window, select the document and click the **X.**

   A check mark appears to the left of the document record before the **#Doc** column.

2. Continue this process for the other documents.
3. When all the reject flags are cleared, click **Apply Changes.**

   This changes the document's Index value from **NO** to **YES.**

4. When all reject flags for all the documents in a parcel are cleared, click **Send.**

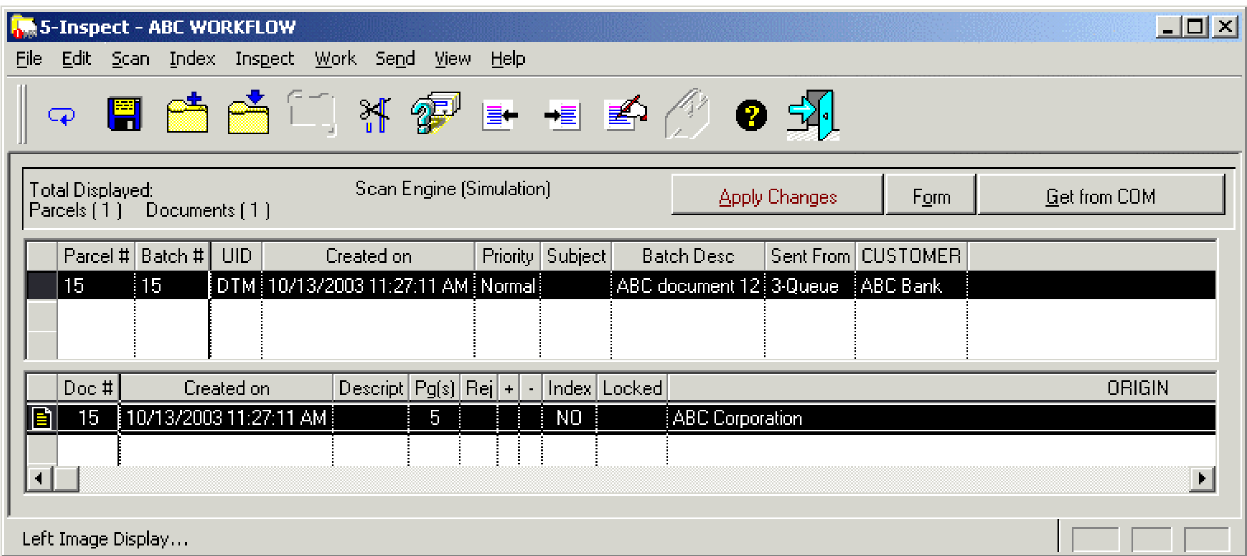


Figure 56: Inspect window: clearing reject flags

Note: All required index values must be entered for the value to change to **YES.**

Adding a Document to a Parcel

To add a document to a parcel, proceed as follows:

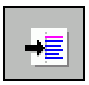
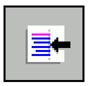
1. Select **Scan > Attach Document to Parcel.**
2. To scan the document, use the **Scan Dialog** as described in Scan Dialog Window.
3. Click **Close Batch.**

The batch with the new document is saved in the queue.

Displaying a Document

To display a document, use any of the following methods:

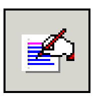
- Double-click the document.
- Select **View > Right Image Display.**
- Select **View > Left Image Display.**
- Click the right image display or left image display button.

The document appears in the Image Viewer on the right side or left side of the window.

To display a document for editing, use any of the following methods:

- Select **View > Modify Image.**
- Press **CTRL+M.**
- Click **Modify Image.**



For information on specifying document display settings, see Specifying Display Settings in Chapter 3: High Volume Scanning.

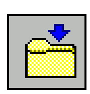
Assigning a Parcel to an Existing Folder

After configuring the Inspect queue settings and viewing the document, start the inspect process. If the inspect process includes ensuring data integrity, you may have to reindex parcels and documents. Indexing a parcel or document includes assigning the parcel or document to a folder.

To assign a parcel to an existing folder, proceed as follows:

1. To find an existing folder, click **Assign Parcel to an Existing Folder.**

   The **Find Existing Folder** window appears.



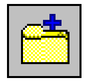
2. Assign the parcel as described in Assigning a Parcel to an Existing Folder in Chapter 4: High Volume Indexing.

Assigning a Parcel to a New Folder

To assign a parcel to a new folder, proceed as follows:

1. To create a new folder, click **Assign Parcel to a New Folder.**

   The **Add/Modify Folder** window appears.



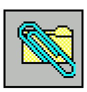
2. Assign the parcel to the new folder as described in Assigning a Parcel to a New Folder in Chapter 4: High Volume Indexing.

Filing Documents into Subfolders and Assigning Document Types

If your system setup requires indexing at the subfolder level, all documents in the parcel must be filed into subfolders and assigned document types.

To file documents into subfolders and assign document types, proceed as follows:

1. Select a document.
2. To open the **Assign to Subfolder or Document Type** dialog, click **Assign Document to a Subfolder and Document Type.**

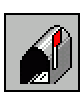


For more information on filing documents, see Filing Documents into Subfolders and Assigning Document Types in Chapter 4: High Volume Indexing.

Sending Inspected Parcels to the Next Queue

When all inspect flags are cleared and index fields are filled, a **YES** value appears in the Index column of the document table and he parcel can be sent to the next queue in the workflow.

To send an inspected parcel, click **Send.**



The **Send Manager** dialog appears. For more information on the Send Manager, see Sending a Batch from the High Volume Scan Queue Using Send Manager in Chapter 3: High Volume Scanning*.*

If you are sending more than one indexed parcel, select **Send > Select All Inspected Parcels.**

Warning: If routing rules are being used, parcels must be sent one at a time.

For information on specifying security settings for documents, folders, and subfolders, see Specifying Document, Folder, and Subfolder Security Settings.

Chapter 7: Queue Processing

This section describes how to process documents using the Queue workflow object. It also describes how to include an external application, such as a word processor or spreadsheet, in the workflow process.

The following topics are described in this section:

- Overview
- Working with Queues

Overview

This section describes the functionality of the Queue workflow object.

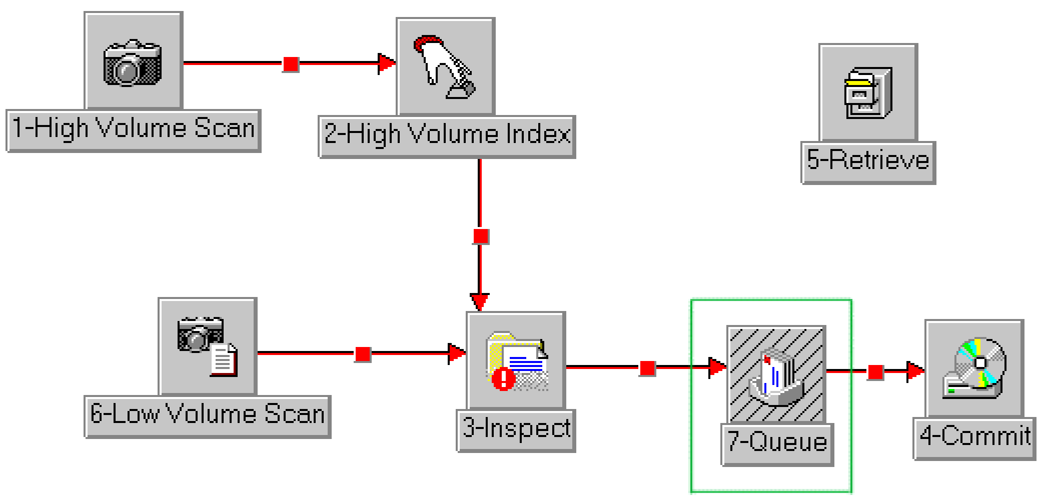


Figure 57: Basic workflow diagram with the Queue object

The Queue workflow object is used for normal processing of documents and to add documents created with a Windows application such as Word or Excel.

The main operations of the Queue object are as follows:

- performs and displays tasks associated with specific parcels and documents
- defines queue properties
- displays the contents of folders
- places parcels on hold
- edits documents and parcels

- prints documents

Working with Queues

The following topics are described in this section:

- Queue Window
- Running Task Applications
- Viewing Task History
- Displaying a Document
- Sending Parcels or Documents
- Sending Parcels to the Fix Queue
- Viewing Individual Statistics
- Folder Snapshot Window
- Viewing and Changing Parcel Status

For information on copying and exporting documents, see Copying and Exporting Documents.

For information on specifying security settings for documents, folders, and subfolders, see Specifying Document, Folder, and Subfolder Security Settings.

For information on viewing document properties, see Viewing Document Properties.

For information on defining reference field values, see Defining Reference Field Values.

For information on searching for batches or parcels, see Searching for Batches or Parcels.

For information on sorting parcels and documents, see Sorting Parcels and Documents.

Queue Window

The **Queue** window contains the features required for processing documents in the workflow queues.

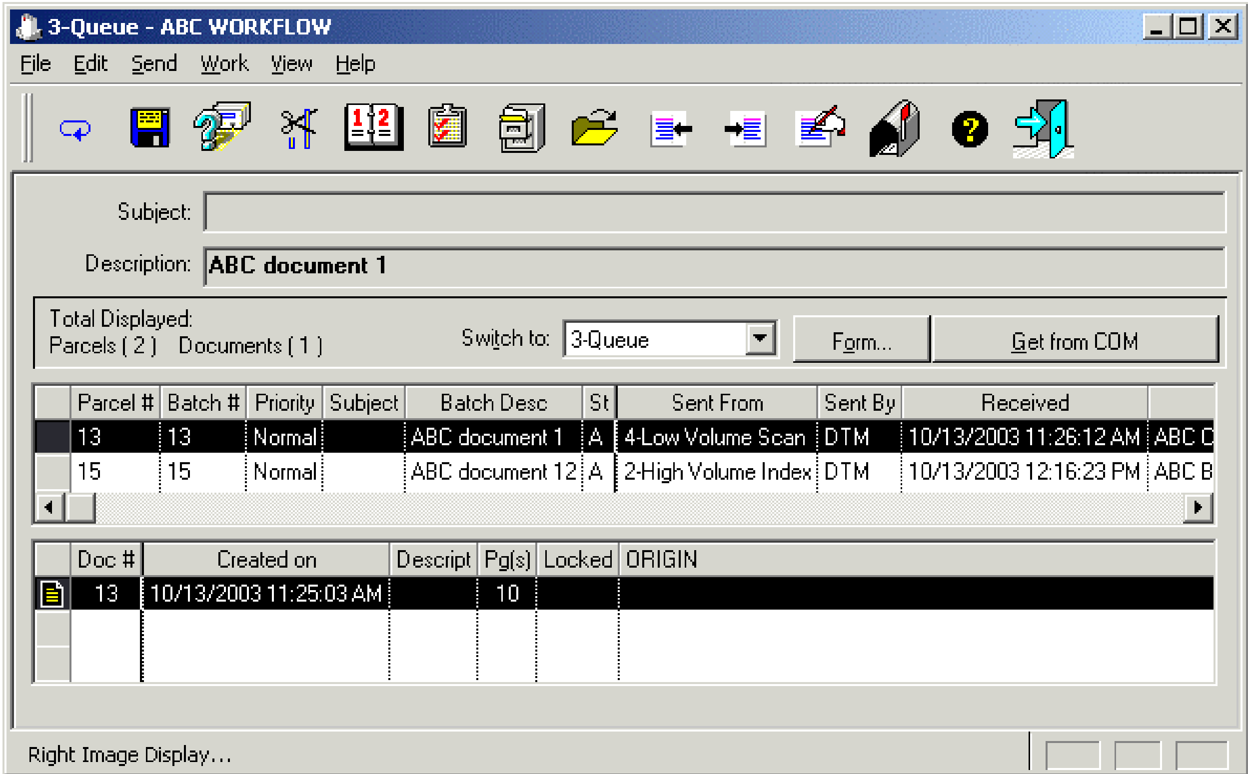


Figure 58: Queue window

The **Queue** window has the following sections:

Queue window sections	
Name	**Description**
Menu and button bars	Includes menus and buttons as described in Appendix A: Exigen Workflow Menus and Buttons.
Information line	Displays parcel, document, and common queue information. It also allows you to toggle between Queue window objects.
Parcel table	Lists all parcels in the queue.
Document table	Lists all documents assigned to the selected parcel. Documents displaying a **Y** in the **Locked** column are checked out for editing.

If a document is opened, the focus can be on the **Queue** window or Image Viewer, depending on the configuration. The focus determines which window is initially activated and displays system messages.

The focus is set by the system administrator as described in the *Exigen Workflow Administration Guide, Part 1: Design and Configuration,* Chapter 5: Designing a Workflow, Setting Viewer Focus.

Running Task Applications

When tasks are assigned to the queue, the **Task** menu is visible. To execute the task, select any task in the menu.

The following topics are included in this section:

- Perform Task Window
- Opening a Document Template
- Attaching an Existing File

Perform Task Window

When a task is selected in the **Task** menu, the **Perform Task** window appears.

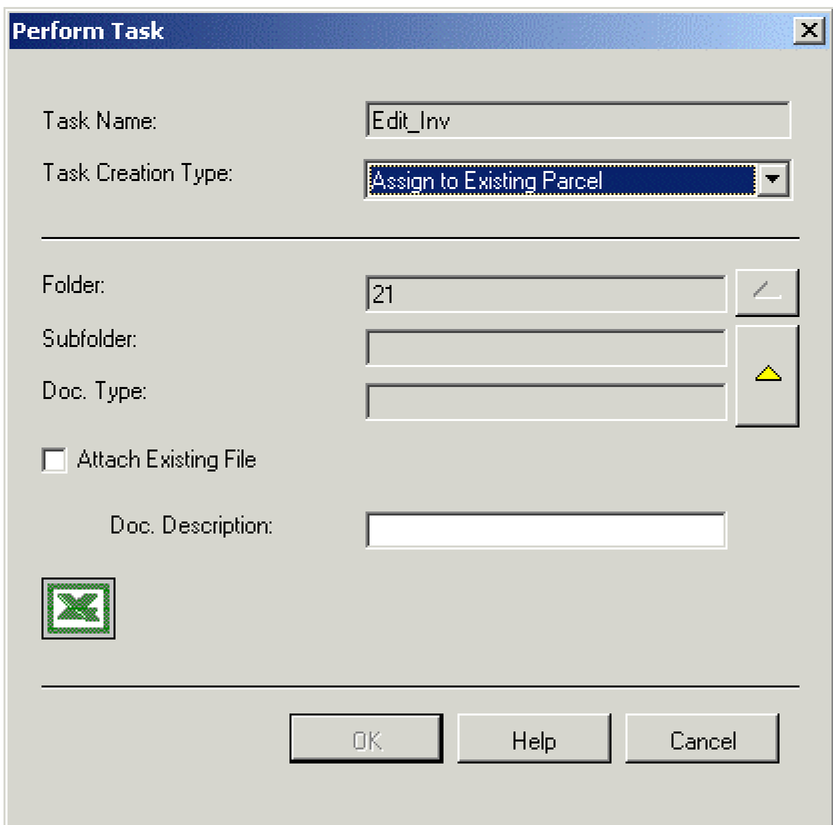


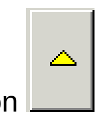
Figure 59: Perform Task window

The system administrator sets up all tasks in the system and determines which attributes are assigned to them. During setup, the following attributes can be assigned:

Task attributes	
Attribute	**Description**
Project	Project containing the document types for this task.

Task attributes	
Attribute	**Description**
Type	Default document type. The document type is assigned by default to all documents created by this task. For a newly created project, no document types are specified. If no type is selected, new documents are created without a document type.
Create Task History	Creates a task history record.
Create New Parcel	New parcel is created in which to place the completed task.
Create New Document	Completed task is placed in the same parcel as the new document.
Launch Task (No Document is Created)	Only the application is launched.
Document file is not created	Document is not created when using an external application that normally creates one.

If **Create New Parcel** is selected in the **Task Creation Type** drop-down list box, the top browse button  is enabled. It is used to select a parcel location.

If **Assign to Existing Parcel** is selected, the middle **Browse** button  is enabled. It is used to assign a subfolder and document type.

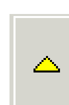
If **Attach Existing File** is selected, the lower browse button  appears. It is used to select a template file.

Opening a Document Template

Document templates can be specified for a project as described in the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow, Setting Up Document Templates for Tasks.

Note: This feature is not available in standard Exigen Workflow client/server and Web applications. It is supported by programmable extensions only, and is available via application programming interfaces (APIs). For information on how to acquire this feature, contact Exigen Support Services.

To open a document template, proceed as follows:

1. In the **Perform Task** window, click the middle browse button .

   The **Assign to Subfolder and Document Type** window appears.

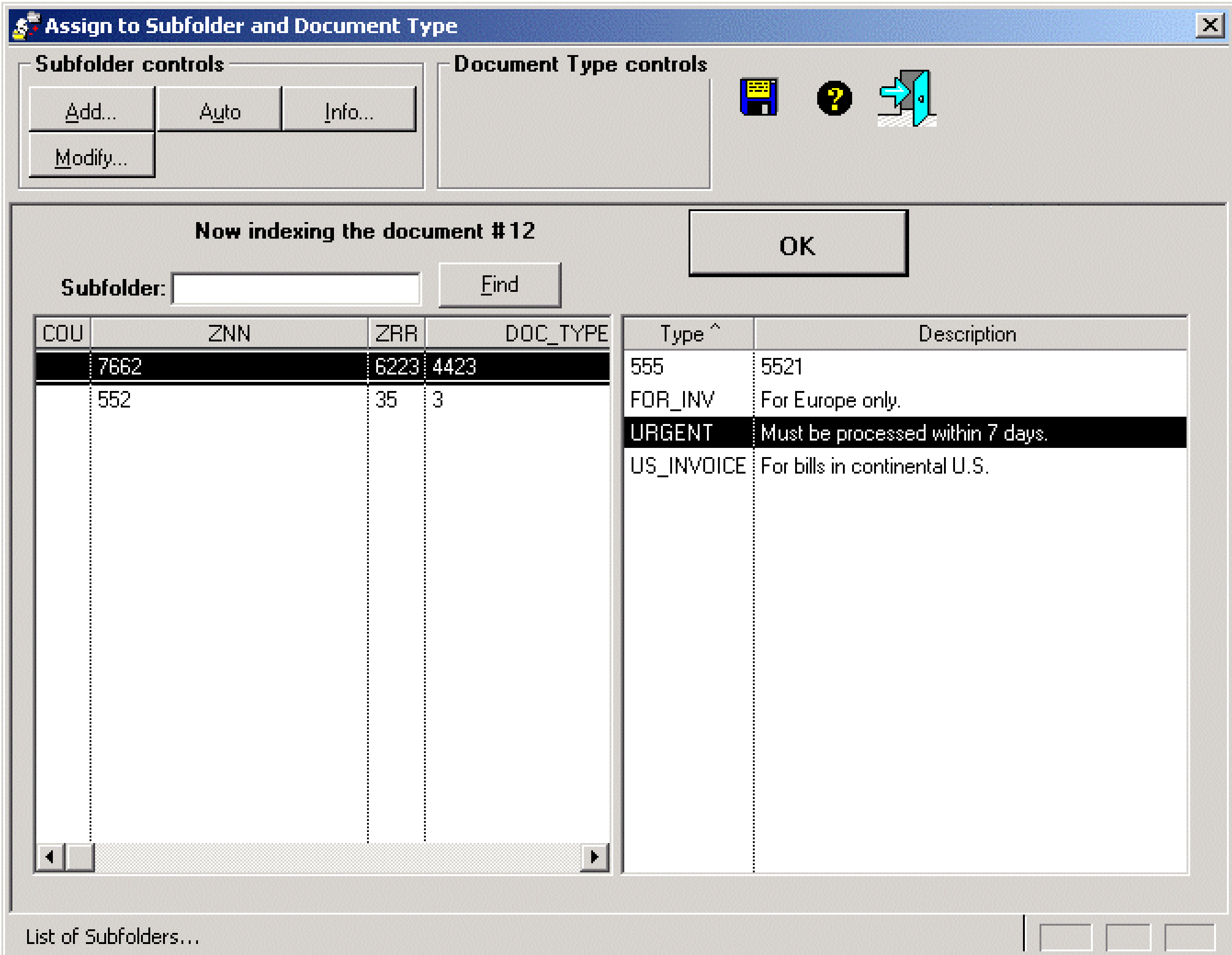


Figure 60: Assigning a document template

In the right pane, the default document type is selected.

2. To specify the default document type and apply the associated template, click **OK.**
3. To select a different document type and apply its associated template, in the right pane, select the document type and click **OK.**

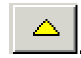
   The **Perform Task** window appears.

4. To start the application and display the template, click **OK.**
5. Complete the task.
6. Save the newly created file.

Attaching an Existing File

To attach an existing file that can be used as a template, proceed as follows:

1. In the **Perform Task** window, select the **Attach Existing File** box.

2. To select the template file, click the lower browse button .

   The **Select File** dialog appears.

3. In the **Files of type** list box, to browse only files in the format required for the selected task, ensure that **Select Task Files** is selected.

   For example, if the task is associated withWord, only `.doc` files appear.

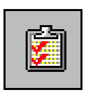
4. Select the template file.
5. Click **Open.**
6. To perform the task, click **OK.**

   After completing the task, a new parcel or document is created.

Viewing Task History

The **Task History** window lists all tasks that have been performed on the documents of the selected parcel. To view all documents created by the task, proceed as follows:

1. Click **Image Display.**
2. To open the **Task History** dialog box, click **Show Task History.**

   The **Task History** window appears.

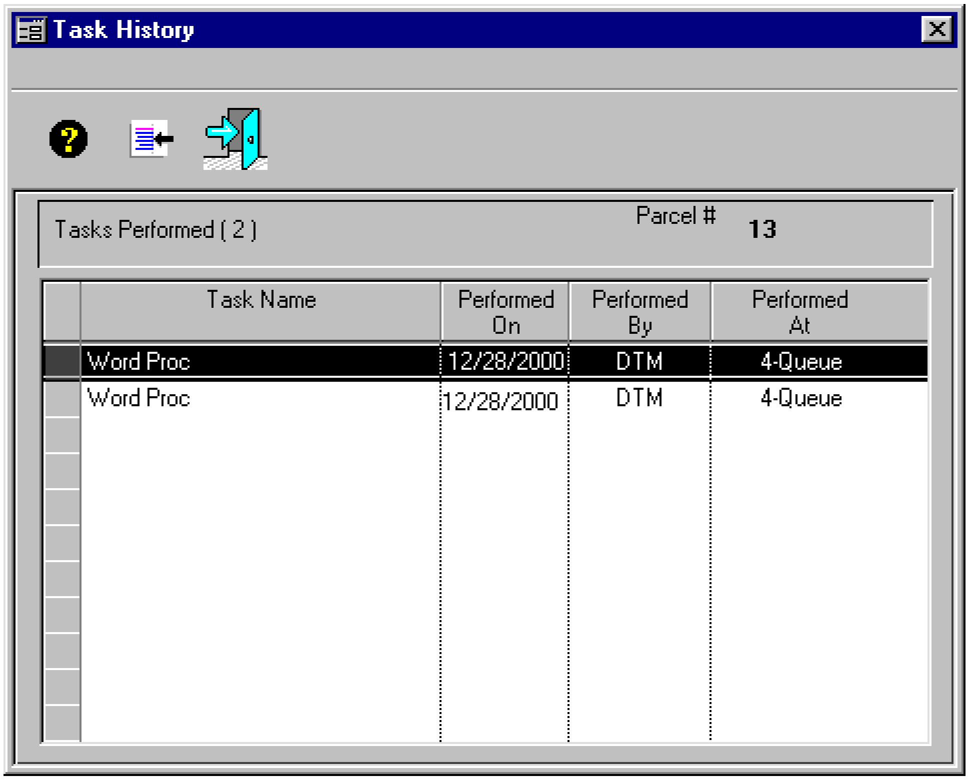


Figure 61: Task History window

The **Task History** window displays the following information:

Task History window	
Name	**Description**
Tasks Performed	Number of tasks in the list.
Parcel #	Current parcel number.

All tasks created in the current folder are listed with the following designations:

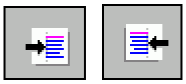
Task designations	
Designation	**Description**
Task Name	Task name.
Performed On	Date the task was performed.
Performed By	ID of the user who performed the task.
Performed At	Workflow object where the task was performed.

Displaying a Document

To display a document, use any of the following methods:

- Double-click the document.
- Select **View > Right Image Display.**

- Select **View > Left Image Display.**
- Click the right image display or left image display button.



The document appears in the Image Viewer on the right side or left side of the window.

Note: The Right Image Viewer has more options, such as access to Print Server and Stamp Management Utility.

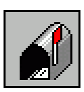
For information on specifying document display settings, see Specifying Display Settings in Chapter 3: High Volume Scanning.

Sending Parcels or Documents

When you finish working with specific parcels or documents, you can send them to the next queue in the workflow.

To send one or more parcels through the workflow, proceed as follows:

1. Select the parcels. To select several parcels, press **CTRL** and click the parcels you want to send.
2. Click **Send Parcel.**



The **Send Parcel(s) To** dialog appears.

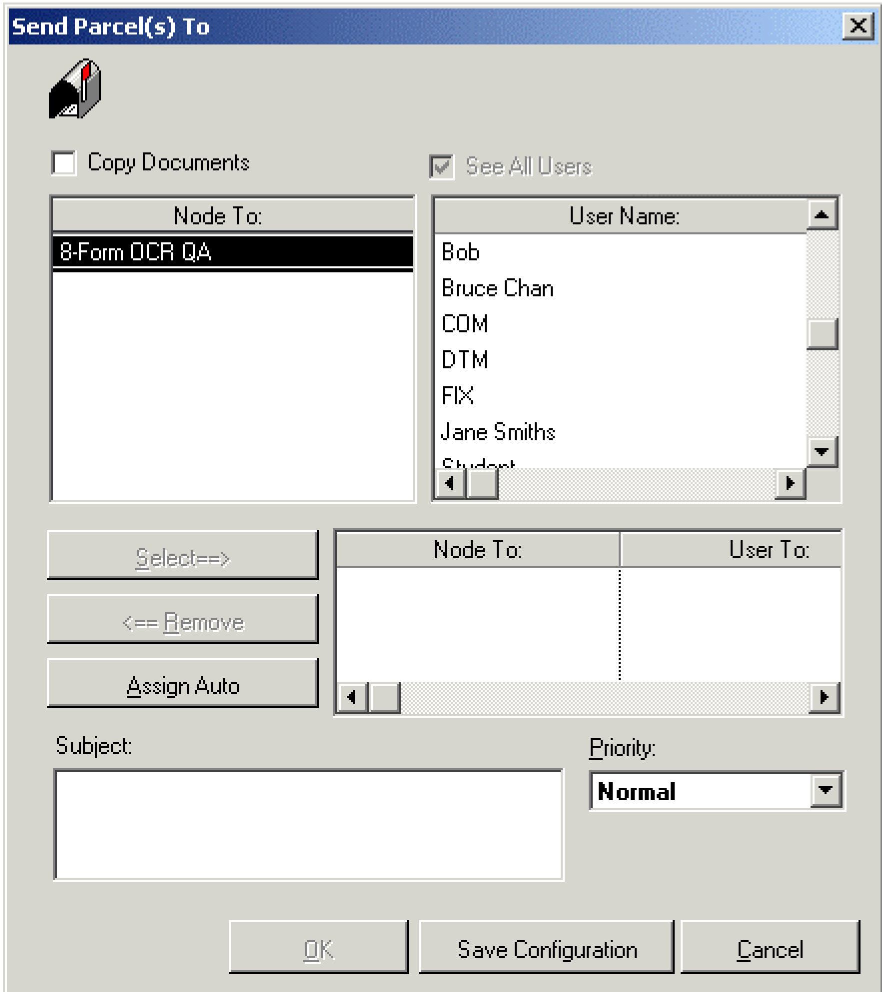


Figure 62: Send Parcel(s) To dialog box

3. To copy the selected documents to a new parcel, select **Copy Documents.**

   If **Copy Documents** is not selected, the following occurs:

   - For selected documents that are in workflow processing, reference documents are created in a new parcel.
   - Selected documents that are not in workflow processing are placed in new parcels.
4. In the **Node To** list, click the queue that you want to receive the parcel.

   Once the queue is selected, all users assigned to that queue are listed in the **User** list.

5. In the **User** list, select the user who must receive the parcel.
6. Click **Select.**

   The system populates the **Node To:** and **User To:** columns with the selected queue and user ID.

7. If the queue and user combination is incorrect, highlight the selection in the **Node To** and **User To** lists and click **Remove.**

Note: **Select** allows you to send parcels and documents to more than one user at a time. The parallel sending feature must first be configured in the workflow before you can use **Select** to send to more than one user at a time.

8. To send a parcel or document to a user in the selected queue with the least number of assigned jobs, click **Assign Auto.**

   If your system uses Corporate Locations, only users assigned to your location are listed in the **User** list. If the **See All Users** option is selected, all users regardless of location are listed.

9. To attach a temporary note to the parcel, in the **Subject** field, enter a temporary note.

Note: Permanent notes must be attached to the document images.

10. To assign the parcel normal or high priority, in the **Priority** list, select a priority.

    High ensures that the parcel is listed at the top of the next queue in the workflow.

11. When selections are made, to send the parcel, click **OK.**
12. To send a document, highlight the document and select **Send > Send Document.**

    If the parcel contains only one document, the entire parcel is sent.

Sending Parcels to the Fix Queue

To send a parcel to the Fix Queue, proceed as follows:

1. Select the document.
2. To open the **Send to Fix** dialog, select **Send > Send to Fix.**
3. Enter notes about the problem parcel and click **Send.**

Viewing Individual Statistics

Exigen Workflow keeps statistical information on the number of parcels and documents processed by a queue and user.

To view the statistics for the current queue and user, select **View > My Statistics.**

The **My Statistics** window displays the desired statistical information.

Folder Snapshot Window

The **Folder Snapshot** window displays information on all documents assigned to the selected folders, such as where each document resides in the workflow.

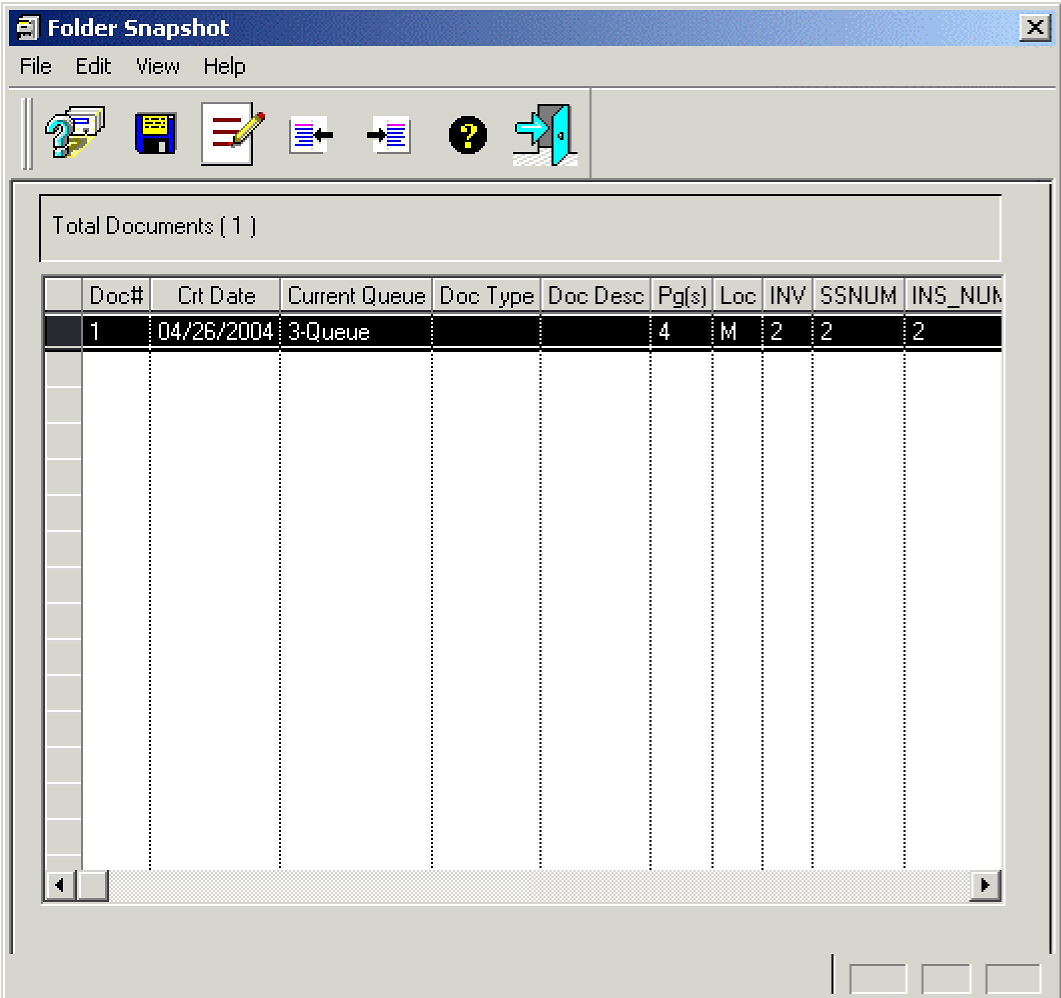


Figure 63: Folder Snapshot window

The **Folder Snapshot** window is used to navigate between related folders. For example, if a customer's current and previous insurance policies are stored in separate folders, the system can be configured to enable navigation between the folders. For information on setting up folder history browsing, see the *Exigen Workflow Administrator's Guide Part 1: Design and Configuration,* Chapter 4: Setting Up Exigen Workflow, Setting Up Folder History Browsing.

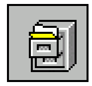
The following topics are included in this section:

- Working with Documents and Folders in the Folder Snapshot Window
- Folder Snapshot Window Buttons and Menu Commands

Working with Documents and Folders in the Folder Snapshot Window

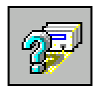
To work with documents and folders in the **Folder Snapshot** window, proceed as follows:

1. To open the **Folder Snapshot** window, click **Show Folder Snapshot.**



   The **Folder Snapshot** window appears.

2. To select the folder documents displayed in the **Folder Snapshot** window, select **Edit > Query Folder Documents** or click **Query Folder Documents.**



   The **Query Folder Documents** window appears.

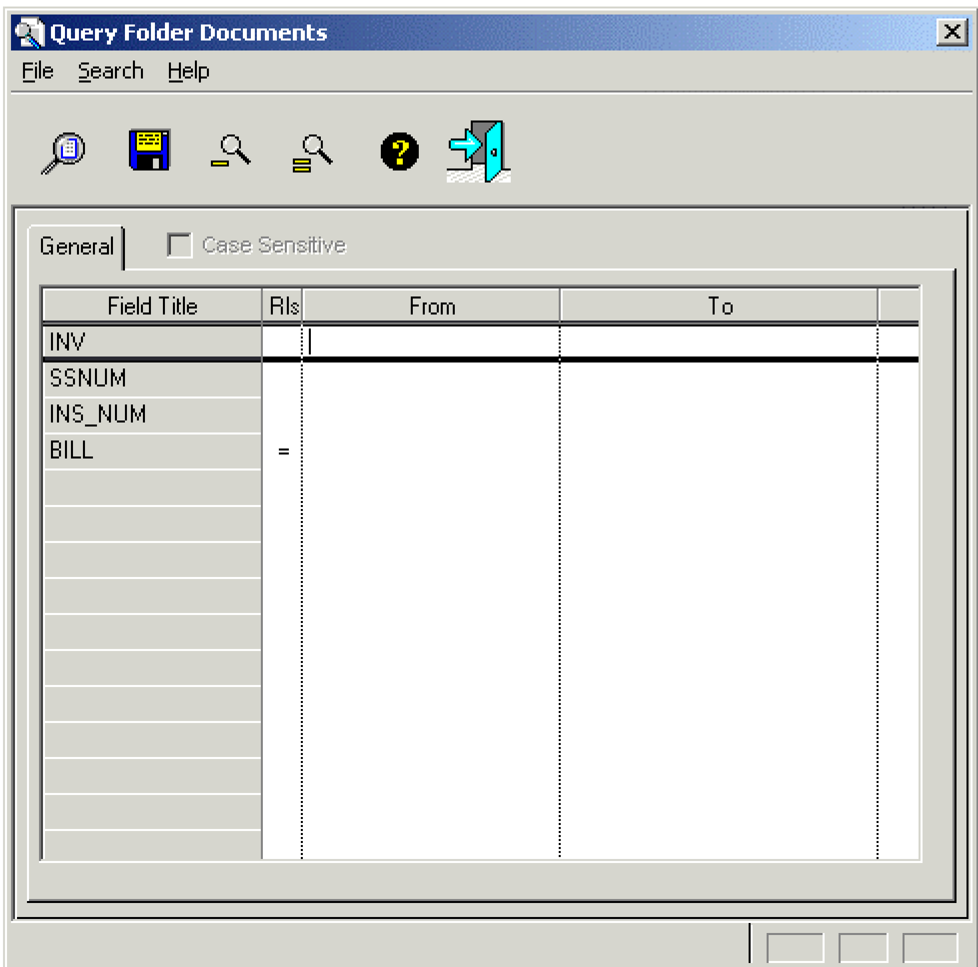
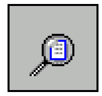


Figure 64: Searching for folders

3. In the **Query Folder Documents** window, enter appropriate search values.

Performing a search in the **Query Folder Documents** window is similar to performing a search in the **Query Parcel Records** window as described in [Searching for Batches or Parcels].

4. Click **Query Folder Documents.**



The search results appear in the **Folder Snapshot** window.

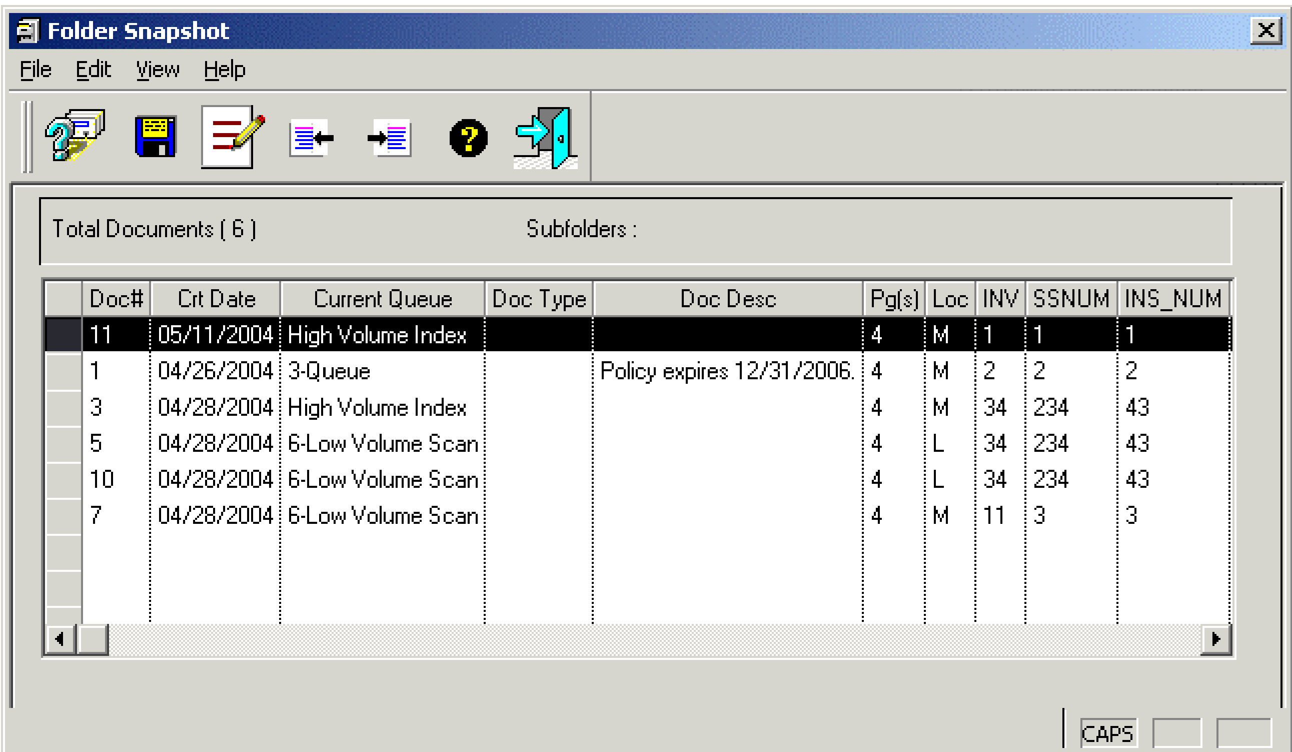
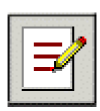


Figure 65: Viewing search results

5. To enter a document description, select a document and select **Edit > Modify Document Description** or click **Modify Document Description.**



The **Modify Description** window appears.

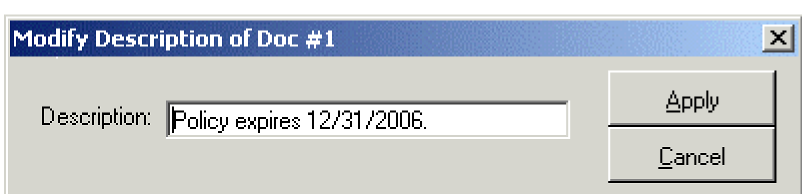


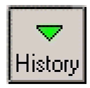
Figure 66: Modifying a document description

6. To add a document description, in the **Description** field, enter the description.
7. To modify a document description, in the **Description** field, replace the existing description.
8. To close the window and save changes, click **Apply.**

   If the folder history browsing option is configured, and the selected folder is associated with a previous folder, the **History** button is enabled.

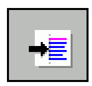
9. To view documents in the previous folder, select the folder and click **History.**

   Documents in the previous folder are displayed.

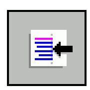


10. To view additional previous folders, click **History** as often as required.
11. To display the previous view, click **Back.**

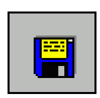
12. To view the document in the Image Viewer on the right side of the window, select **View > Right Image Display** or click **Right Image Display.**



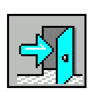
13. To view the document in the Image Viewer on the left side of the window, select **View > Left Image Display** or click **Left Image Display.**



14. To save the size and position of the **Folder Snapshot** window, select **File > Save Configuration** or click **Save Configuration.**

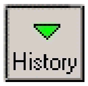
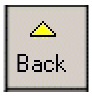
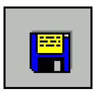
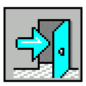
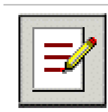
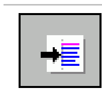
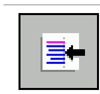
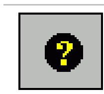


15. To exit the **Folder Snapshot** window, select **File > Exit Folder Snapshot** or click **Exit Folder Snapshot.**



Folder Snapshot Window Buttons and Menu Commands

The **Folder Snapshot** window contains the following buttons and menu commands:

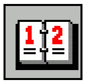
Folder Snapshot window buttons and menu commands			
Button	**Menu command**	**Shortcut key**	**Description**
			**History** Displays previous folder documents. This button is enabled only if the folder history browsing option is configured, and a previous folder is available for viewing.
			**Back** Displays the previous view. This button is enabled only when a previous folder is selected.
	**File > Save Configuration**	**CTRL+S**	**Save Configuration** Saves the size and position of the current window.
	**File > Exit Folder Snapshot**	**F12**	**Exit Folder Snapshot** Exits the **Folder Snapshot** window.
	**Edit > Query Folder Documents**	**CTRL+Q**	**Query Folder Documents** Searches for folder documents.
	**Edit > Modify Document Description**	**CTRL+D**	**Modify Document Description** Modifies the document description.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Displays a selected document in the Image Viewer on the right side of the window.
	**View > Left Image Display**	**CTRL+L**	**Left Image Display** Displays a selected document in the Image Viewer on the left side of the window.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	Help > About Exigen Workflow		**About** Exigen Workflow Displays Exigen Workflow copyright and release information.

Viewing and Changing Parcel Status

Unless otherwise specified, all parcels in the workflow are assigned an **Active** status. The Set Parcel to Hold function allows you to change a parcel status from **A** (Active) to **H** (Hold).

To change a parcel status to hold, proceed as follows:

1. To open the **Set Parcel to Hold** dialog box, click **Set Parcel to Hold.**



The **Set Parcel to Hold** dialog appears.

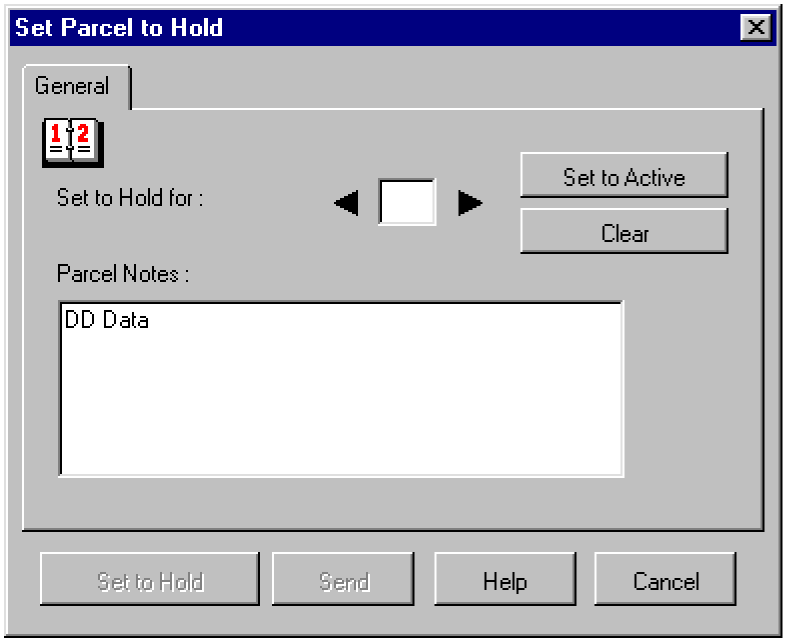


Figure 67: Set Parcel to Hold dialog

2. In the **Set to Hold for** field, enter the number of days the parcel is to be kept on hold, or click the black triangles to select the desired value.
3. Click **Set to Hold.**
4. To set a parcel on hold in another user's queue, set the number of days, and click **Send.**

   When the number of days expires, the parcel reverts to active status in the recipient's queue.

5. To view parcels with different status codes, select **View > Parcels.**

   The cascading menu allows you to select whether to view active, hold, expired, or all parcels in the queue.

Chapter 8: Committing Documents

This section describes how to save document images to an optical disk using the Commit workflow object.

The following topics are described in this section:

- Overview
- Commit Basics

Overview

This section describes the functionality of the **Commit** object.

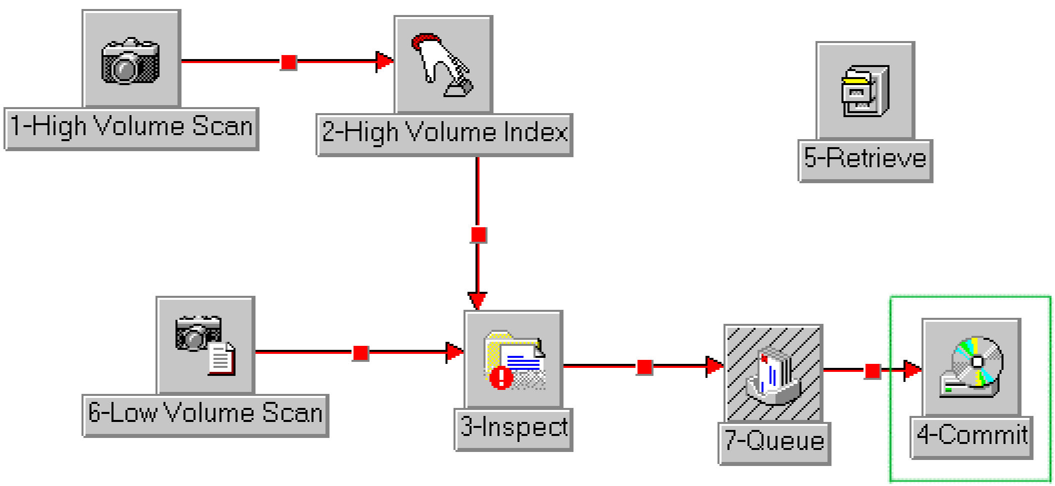


Figure 68: Basic workflow diagram with the Commit object

The **Commit** workflow object is used to move documents to permanent storage, either optical disk or the image server. The following table compares the Exigen Workflow system with a traditional filing system:

Workflow and file cabinet comparison	
In Exigen Workflow	**In a filing cabinet**
Documents	Paper documents
Subfolders	Manila folders
Folders	Hanging folders
Optical disk	Storage file cabinet

Only documents that are completely processed must be moved to permanent storage. In permanent storage documents are read-only. Documents in permanent storage have a node identifier of 0 and cannot be modified unless retrieved with the Retrieve from Optical function in the Low Scan object. For information on the Retrieve from Optical function, see Retrieving Archived Documents for Revision.

One of the functions of the Commit queue is to delete parcels associated with the documents. While parcels are needed to process documents within the workflow, they become obsolete when documents are committed to permanent storage. Deleting parcels also frees up storage space on the system.

Warning: If there are no optical storages with the same location as the user has, and the user does not have the GLOBAL location, documents cannot be committed by the user.

Commit Basics

The following topics are included in this section:

- Committing Documents
- Commit Queue Window
- Configuring the Storage Media
- Committing Documents to Storage Media

For information on viewing document properties, see Viewing Document Properties.

Committing Documents

The following topics are included in this section:

- Preparing to Commit
- Committing Documents

Preparing to Commit

Before committing documents, perform the following steps:

1. Display and review documents that are scheduled to be committed.
2. Ensure that the commit configurations are set as described in the *Exigen Workflow Administrator's Guide, Part 1*: *Design and Configuration,* Chapter 4: Setting up Exigen Workflow, Maintaining Storage Locations.

Note: The system administrator must set the required Commit configurations.

Committing Documents

To commit documents, proceed as follows:

1. In Exigen Workflow Explorer, double-click **Commit.**

   The **Commit Queue** window appears.

2. Configure the storage media as described in Configuring the Storage Media.
3. Commit documents to the storage media as described in Committing Documents to Storage Media.

Commit Queue Window

The **Commit** window contains the functions required for committing documents to permanent storage.

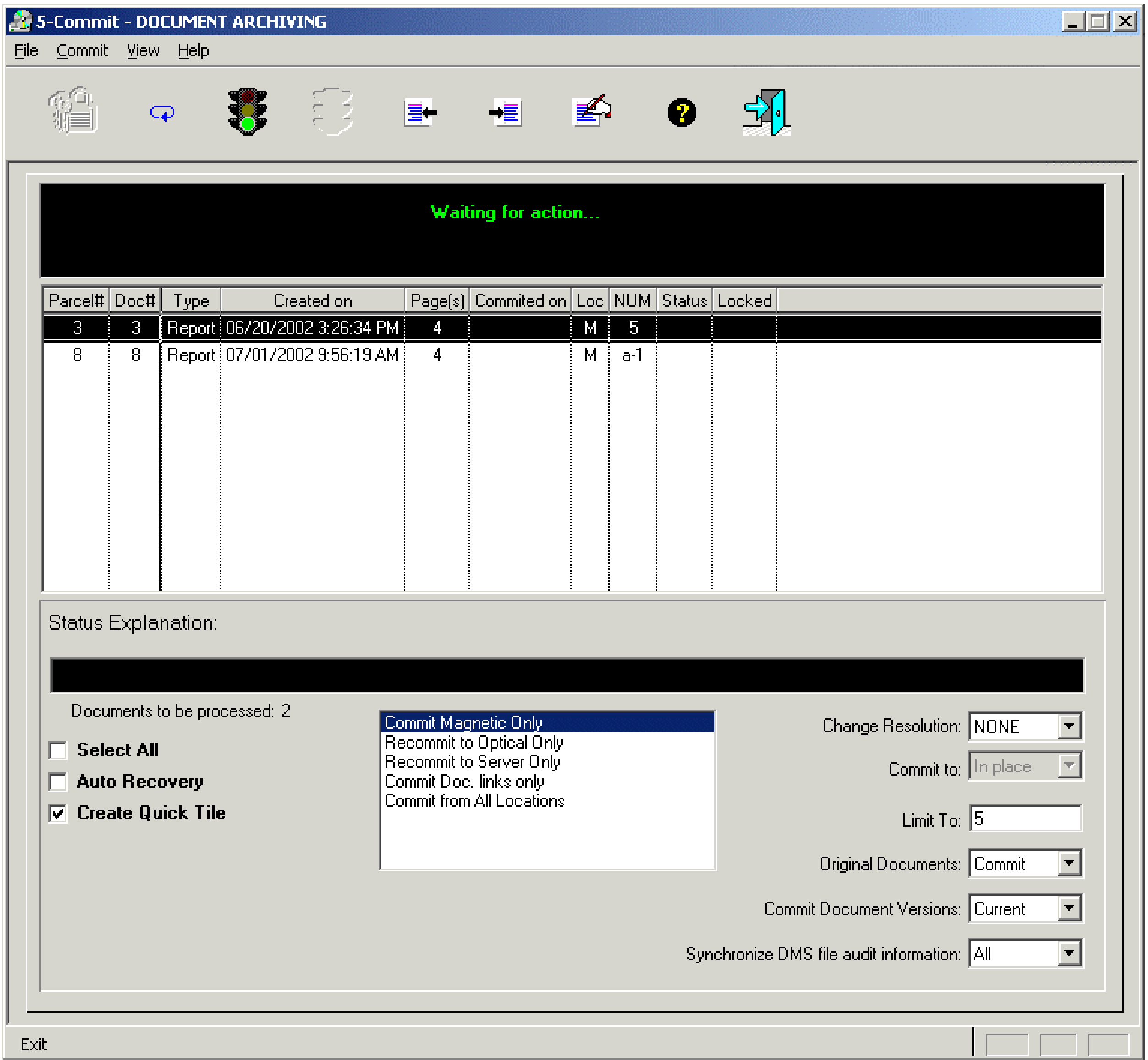


Figure 69: Commit queue window

The window has the following sections:

Commit queue window	
Function	**Description**
Menu and button bars	Contain functions and utilities in the Commit queue. For more information on menus and button bars, see Appendix A: Exigen Workflow Menus and Buttons.
Table	Displays information on the documents to be committed.

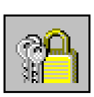
The columns in the table display the following information:

<table>
<tr><th colspan="2">Commit queue table columns</th></tr>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Parcel#</td><td>Parcel ID.</td></tr>
<tr><td>Doc#</td><td>Document number for each document.</td></tr>
<tr><td>Type</td><td>Document type assigned to the document.</td></tr>
<tr><td>Created on</td><td>Date the document was created.</td></tr>
<tr><td>Page(s)</td><td>Number of pages in the document.</td></tr>
<tr><td>Commit Date</td><td>Date the document was originally committed.</td></tr>
<tr><td>Loc</td><td>Physical location of the document:
<table>
<tr><th>Symbol</th><th>Location</th></tr>
<tr><td>M</td><td>Magnetic disk</td></tr>
<tr><td>O</td><td>Optical disk</td></tr>
<tr><td>H</td><td>Image server</td></tr>
</table></td></tr>
<tr><td>Status</td><td>Commit operation status:
<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>Err</td><td>Errors occurred during document commitment.</td></tr>
<tr><td>Done</td><td>Documents are committed successfully.</td></tr>
</table></td></tr>
<tr><td>Locked</td><td>Displays the document’s status: Y indicates the document is checked out for editing.</td></tr>
</table>

For information on the lower section of the **Commit** window, see Committing Documents to Storage Media.

Configuring the Storage Media

Before beginning the Commit process, configure the volume and cache directories, and the size and maximum number of files to be sent to each directory. To configure the Commit queue, click **Setup.**



Note: The **Setup** button in the toolbar and the corresponding menu item are disabled if there are no configuration records in the **Optical Disk Volume Maintenance** or **Image Server Setup** windows. These windows are accessed by selecting **Workflow Tools > Administrator Utilities > Optical Disk Utilities.** You must create the corresponding configuration records.

Depending on what storage device is selected in the Commit to combo box, the **Optical Disk Volumes Maintenance** window or **Image Server Setup** window appears.

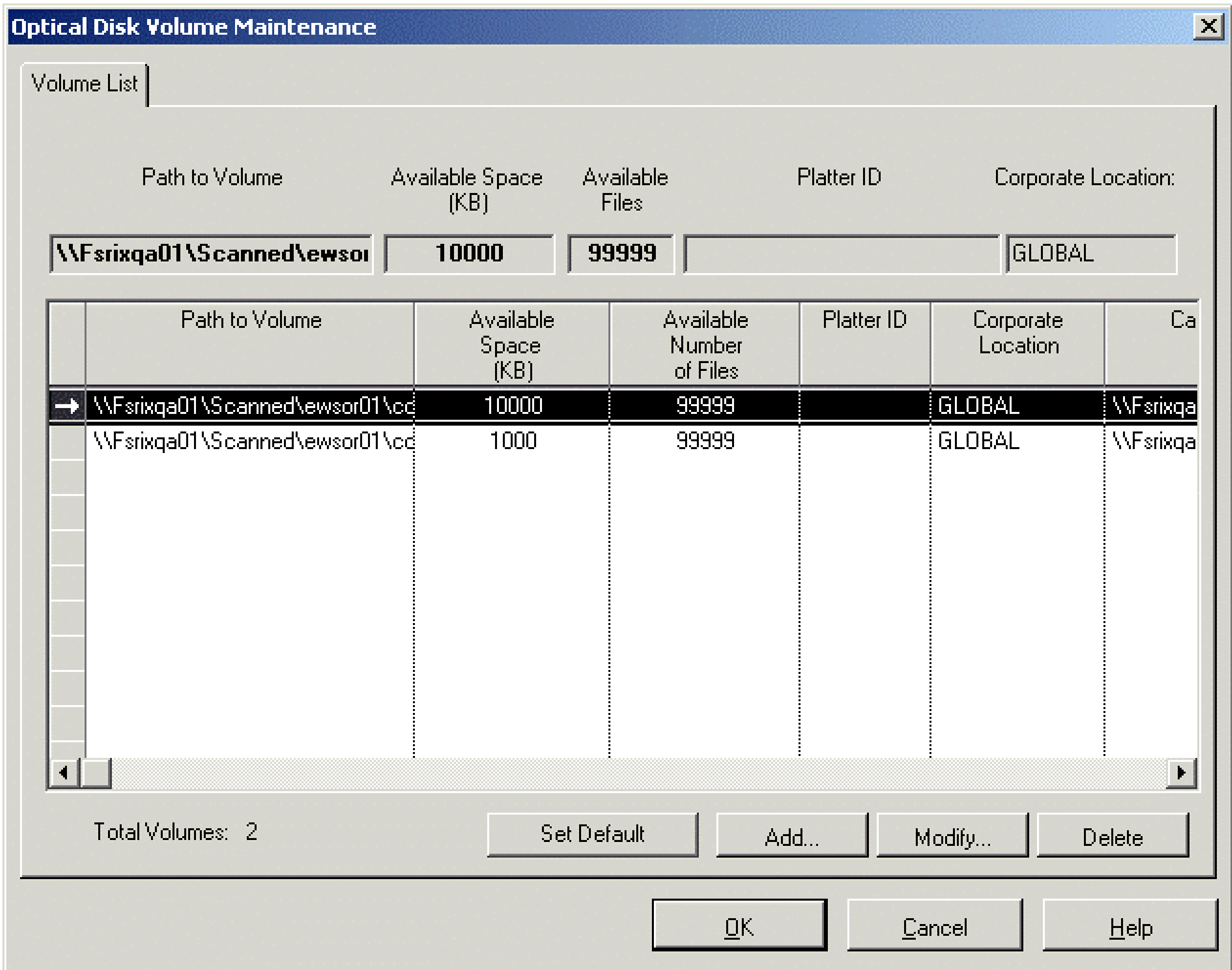


Figure 70: Optical Disk Volumes Maintenance window

The **Optical Disk Volumes Maintenance** window displays the paths on the optical storage medium. Prior to committing, a platter must be selected. The default selection is the first platter listed.

The columns in the table display the following information:

Optical Disk Volumes Maintenance table columns	
Column	**Description**
Path to Volume	File path of the platter.

Optical Disk Volumes Maintenance table columns	
Column	**Description**
Available Space (KB)	Space available on the platter.
Available Number of Files	Number of files that can be stored on the platter.
Platter ID	Platter name.
Corporate Location	Selected corporate location where the images are located.

The following columns are not displayed in the figure, but they can be viewed by using the horizontal scroll bar at the bottom:

<table>
<tr><th colspan="2">Optical Disk Volumes Maintenance table columns</th></tr>
<tr><th>Name</th><th>Description</th></tr>
<tr><td>Cache Directory</td><td>File path of the cache directory for the platter.</td></tr>
<tr><td>Always Cache</td><td>If Y, documents are cached first.</td></tr>
<tr><td>Storage Type</td><td>Image storage type, for example, Full, Partial, Single.</td></tr>
<tr><td>Device Status</td><td>Device status:
<table>
<tr><th>Symbol</th><th>Description</th></tr>
<tr><td>A</td><td>Active.</td></tr>
<tr><td>L</td><td>Local.</td></tr>
<tr><td>N</td><td>Not active.</td></tr>
</table></td></tr>
</table>

Specifying Settings for Optical Disk Volumes

To specify settings for optical disk volumes, proceed as follows:

1. To add a record to the Volumes List, click **Add.**

   The **Add Configuration** window appears.

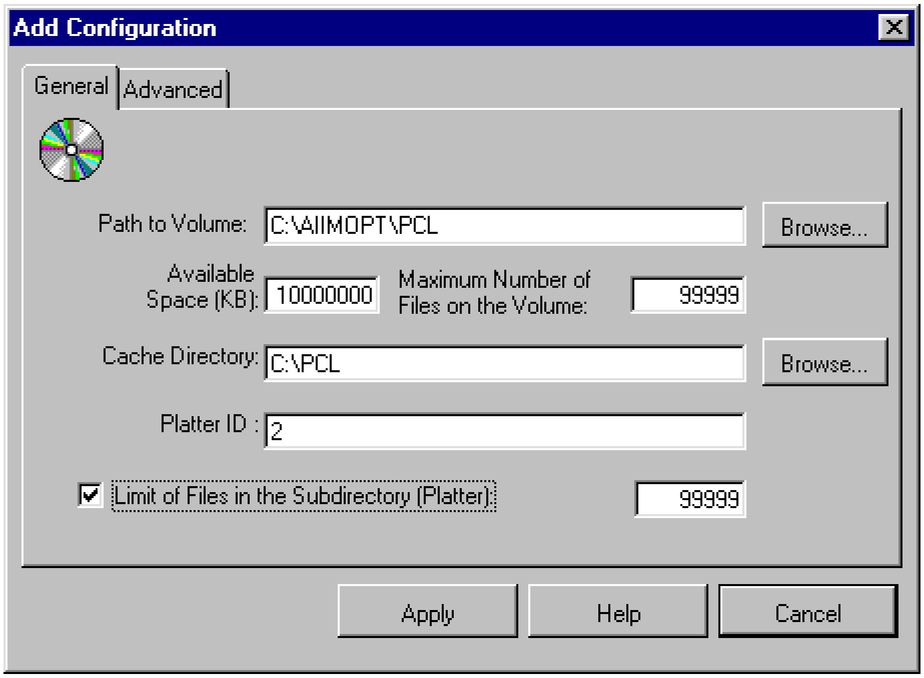


Figure 71: Add Configuration with General tab

2. In the **General** tab, perform the following steps:
    1. To assign the path to the volume, click **Browse** by the **Path to Volume** field.

       When selecting a directory, the system creates a subdirectory that corresponds to the Project ID.
    2. In the **Available Space (KB)** field, enter the number of kilobytes available on the platter.
    3. In the **Maximum Number of Files on the Volume** field, enter an appropriate number.
    4. To assign a cache directory, click **Browse** by the **Cache Directory** field.
    5. In the **Platter ID** field, enter a name for the platter.

       This feature is optional, but it can assist you in locating specific images.
    6. To limit how many files are loaded onto a platter, select the **Limit of Files in the subdirectory (platter)** check box and enter the number in the field at the right.
3. In the **Advanced** tab, perform the following steps:
    1. To specify the cache option, in the **Always Cache** list, select **Y** or **N.**
    2. To specify settings for image storage, in the **Storage Type** list, select one of the following options:

Storage Type options	
Name	**Description**
Partial	Quickly accesses the stored images.
Full	Stores image information without additional changes.
Single	Stores images created by external software.

3. To specify platter status, in the **Device Status** list, select one of the following:

Device Status options	
Name	**Description**
A	**Active.** The platter is ready for operation and is available to all users.
L	**Local.** The platter is local to a user's computer. For example, a single user has write access to the device, while others have only read access.
N	**Non-active.** The device is not ready.

Note: To perform operations successfully, Active status is recommended.

4. In the **Corp. Location** list, select the appropriate location.

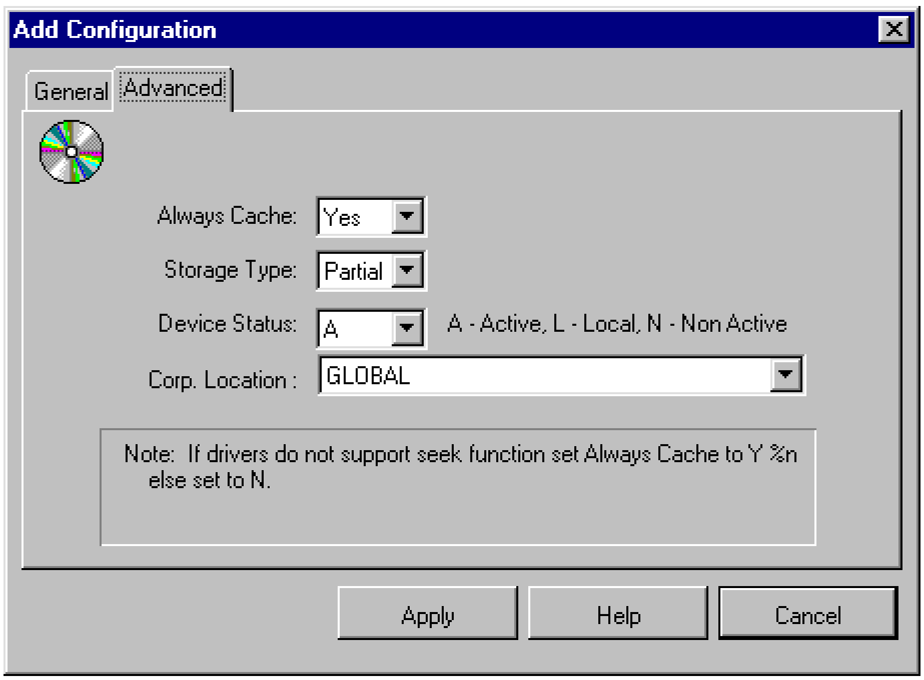


Figure 72: Add Configuration window with Advanced tab

Documents can be committed only if the platter corporate location matches the user's location.

5. When all commit queue settings are configured, click **Apply.**

A message appears indicating that the Path to Volume directory does not exist and asks if you want to create it. The three-character project ID of the subdirectory, displayed in the **Path to Volume** field, is modified by the addition of a five-digit number. For example, XXX00001. Each subdirectory is given a five-digit extension to make locating the directory easier.

6. To modify a platter configuration, in the **Optical Disk Volumes Maintenance** window, highlight the record and click **Modify.**

7. To remove a record from the system, in the **Optical Disk Volumes Maintenance** window, click **Delete.**

   The **Image Server Setup** window appears.

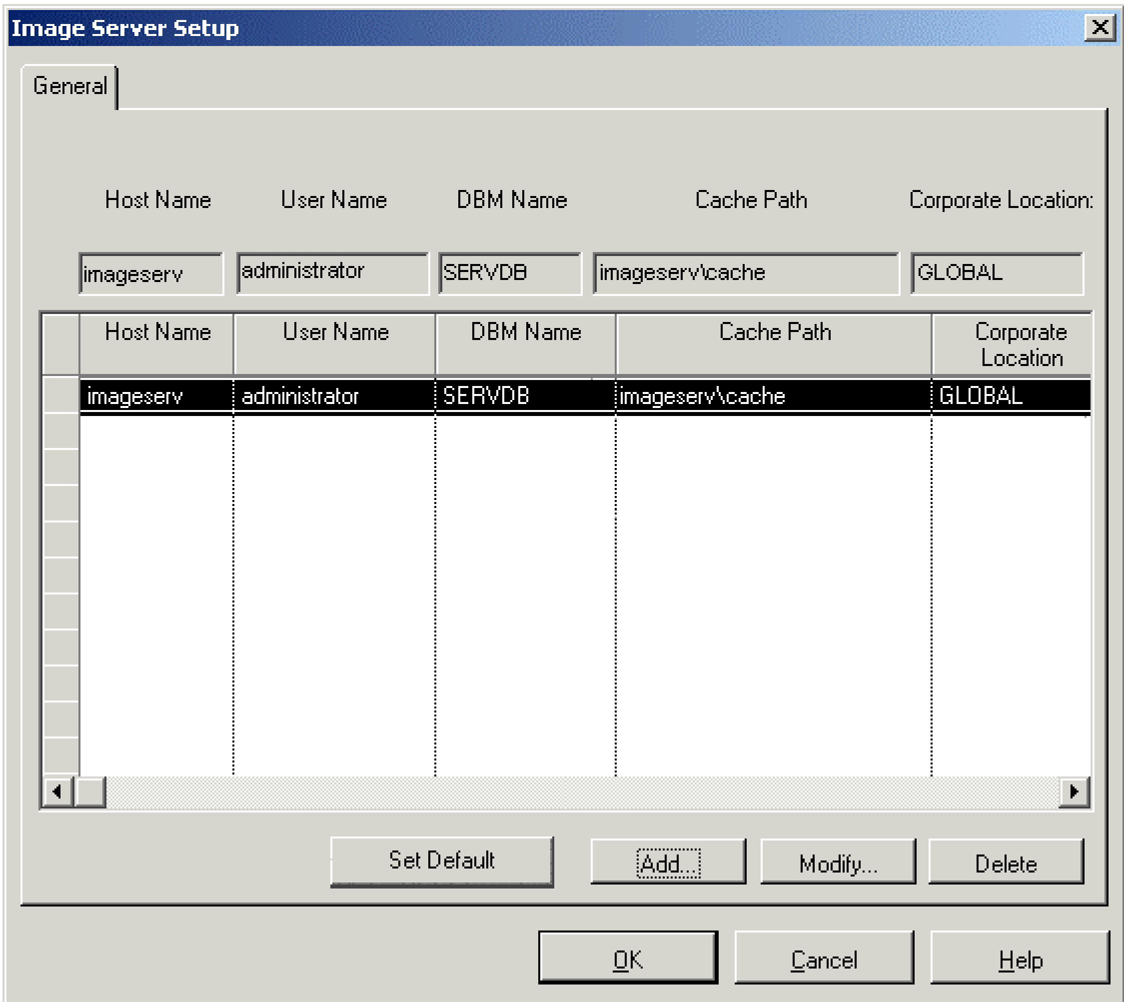


Figure 73: Image Server Setup window

8. To add a new image storage server, click **Add.**

   The **Add Configuration** window appears.

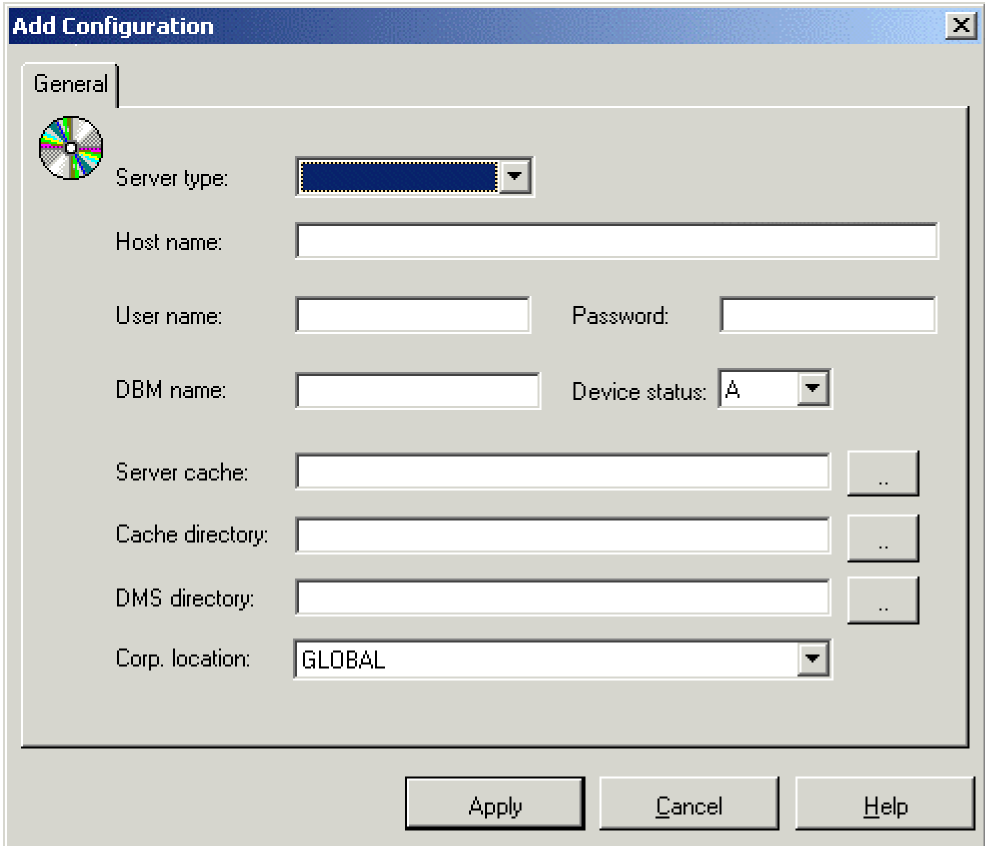


Figure 74: Adding an Image Server

9. In the **General** tab, enter the following values:

<table>
<tr><th colspan="2">Adding an Image Server, General tab</th></tr>
<tr><th>Field name</th><th>Description</th></tr>
<tr><td>Host Name</td><td>Server host name. To find out what this value is, see the server documentation.</td></tr>
<tr><td>User Name and Password</td><td>Login information for the server’s administrator.</td></tr>
<tr><td>DBM Name</td><td>Database that the server uses. To find out what this value is, see the server documentation.</td></tr>
<tr><td>Device Status</td><td>Device status:
<table>
<tr><th>Symbol</th><th>Description</th></tr>
<tr><td>A</td><td>Active. The device is functioning and available to all users.</td></tr>
<tr><td>N</td><td>Not active. The device is not currently in use.</td></tr>
</table>
</td></tr>
<tr><td>Server Cache</td><td>Existing directory that the server uses to store its temporary files. To find out what this value is, see the server documentation.</td></tr>
</table>

Adding an Image Server, General tab	
Field name	**Description**
Cache Directory	Directory name that Exigen Workflow uses to temporarily store files retrieved from the image server. This must be a network directory available to all users. If a file is modified after it is committed to optical storage, Exigen Workflow creates a new parcel for the file and stores it in the cache directory until it is recommitted.
DMS Location	Directory name where DMS images are stored.

10. To add the new server to the system, click **Apply.**
11. To activate a server, select it and click **Set Default.**
12. To modify a server, highlight the server in the list and click **Modify.**
13. To remove temporary files that were not removed automatically, click **Clear Cache.**

    Temporary files may not be removed automatically if the server shuts down improperly.

14. In the **Clear Cache** dialog, remove temporary files.

Exigen Workflow starts the commit processfrom the selected server specified in the **Path to Volume** field in the **Image Server Setup** window, and progresses down the list. The servers above the selected server are ignored. Make sure that you have selected the first active server in the list before exiting this window.

Committing Documents to Storage Media

To indicate the number of records you want to commit before starting the commit process, proceed as follows:

1. To specify the number of records to commit, in the **Commit** window, in the **Limit To** field, enter a number.
2. To populate the document list, click **Refresh.**

   The **Documents to be Processed** field displays the total number of documents in the list. This number includes all documents in each parcel that are queued, in progress, and committed until the corresponding parcel commit is completed.

   The following options at the bottom of the **Commit** window are used to specify which documents to commit:

Commit queue options	
Option	**Description**
Commit Magnetic Only	Commits only those documents residing on magnetic media.
Recommit to Optical Only	Commits only those documents that were previously committed to optical media, but were returned to the workflow via the Retrieve object.
Recommit to Server Only	Commits only those documents that were previously committed to a server, but were returned to the workflow via the Retrieve object.
Commit	Commits only database records for reference documents. Document links are

Commit queue options	
Option	**Description**
Doc. links Only	created when one image file is referenced in the database in more than one document record. The original image file must be committed via the Transfer Utility. For details on committing database records, see the *Exigen Workflow Administrator's Guide, Part 3: Utilities,* Transfer Utility.
Commit from All Locations	Commits all documents regardless of type.

3. In the **Change Resolution** list, select one of the following dots-per-inch (DPI) settings:
   - **100**
   - **150**
   - **200**
   - **None**

   Lowering the resolution speeds up the commit process and decreases the amount of storage space needed, and lowers the image quality.

4. In the **Commit To** combo box, select **Optical** or **In Place.**

   The following table describes the Commit To options:

Commit To options	
Option	**Description**
Optical	Physically moves the image files to a different location. The node ID is changed to **0** and the location to **0.**
In Place	Leaves the image files in the current location, but changes the database to reflect the documents in committed status.

   This process also deletes the associated batch/parcel records for the documents.

5. In the **Original Documents** list box, select **Commit** or **Delete.**

   The following table describes the **Original Documents** options:

Original Documents options	
Option	**Description**
Commit	Commits the original documents after the corresponding DMS documents have been committed.
Delete	Deletes the original documents after the corresponding DMS documents have been committed.

   This list box provides the options for processing original documents such as `.doc` or `.xls` after the corresponding DMS documents have been committed.

6. In the **Commit Document Versions** box, select **Current** or **All.**

   The following table describes the Commit Document Versions options:

Commit Document Versions options	
Option	**Description**
Current	Commits the current document.
All	Commits all document versions.

7. In the **Synchronize DMS file audit information** box, select **All** or **Filter.**

   The following table describes the Synchronize DMS file audit information options:

Synchronize DMS file audit information options	
Option	**Description**
All	All events from DMS file are synchronized.
Filter	Audit event filter is used for DMS file synchronization.

8. To select all documents for the commit process, select the **Select All** check box.

   If this box is not selected, only the highlighted documents are committed.

9. To create tiles of the document pages, select the **Create Quick Tile** check box.

   Selecting this box slows the commit process, but enables users to view tiles in retrieve mode.

10. To automatically recover documents locked during a system crash, select the **Auto Recovery** check box.

11. When all settings are specified, to begin the commit process, click **Start.**

    The **Run Commit** dialog appears. The **Run Commit** dialog is used to specify the date and time for starting the commit process. By default, the current date and time are displayed.

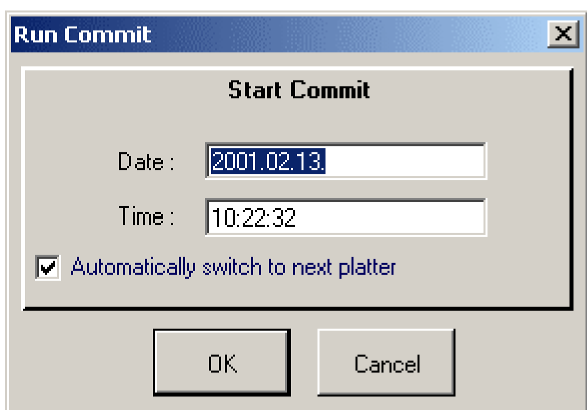


Figure 75: Run Commit

12. To change the date and time for starting the commit process, edit the values in the **Date** and **Time** fields.

13. If you are using several platters, select the **Automatically switch to next platter** option.

    This function provides automatic switching to the next platter if the storage space for one volume runs out. Switching is possible for platters with Active status.

14. To close the **Run Commit** dialog without saving the new values, click **Cancel.**
15. To run the commit process with the entered values, click **OK.**
16. To end the commit process before it is finished, click **Stop.**

    When all the documents have been processed, the commit status appears beneath the document list.

    To view a document's status, select the document.

For information on specifying security settings for documents, folders, and subfolders, see Specifying Document, Folder, and Subfolder Security Settings.

Chapter 9: Document Retrieval

This section describes how to retrieve documents from either the workflow or the optical disk using the Retrieve workflow object.

The following topics are described in this section:

- Overview
- Retrieve Basics
- Retrieving FTS Documents
- Work Item Submitter

Overview

This section describes the functionality of Retrieve object.

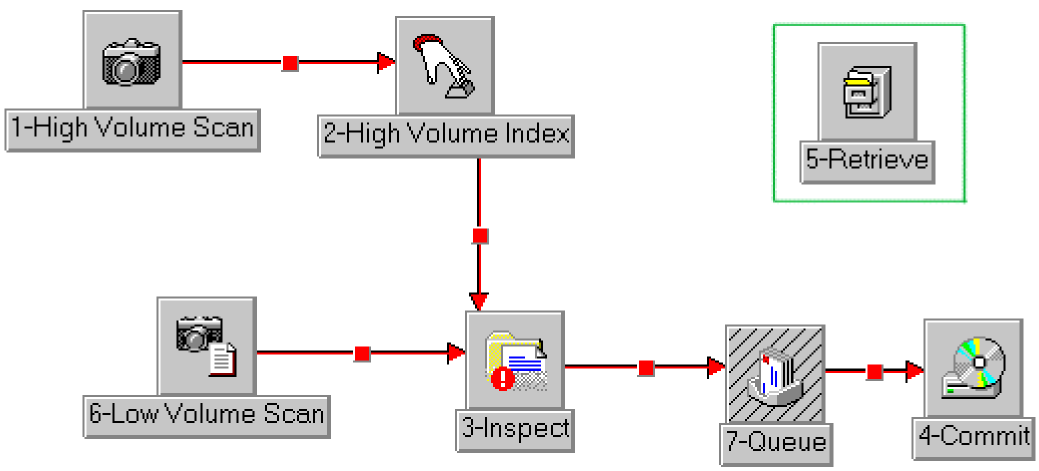


Figure 76: Basic workflow diagram with Retrieve

The Retrieve workflow object retrieves documents from both optical disk and the workflow. Documents retrieved from optical storage cannot be changed. Documents cannot be routed from the Retrieve objects.

Retrieve Basics

The following topics are described in this section:

- Retrieving Documents

- Retrieving Documents from Permanent Storage
- Conducting a Search
- Retrieve Results Window

For information on specifying security settings for documents, folders, and subfolders, see Specifying Document, Folder, and Subfolder Security Settings.

For information on viewing document properties, see Viewing Document Properties.

For information on sorting parcels and documents, see Sorting Parcels and Documents.

Retrieving Documents

To retrieve documents, proceed as follows:

1. In Exigen Workflow Explorer, double-click the **Retrieve** icon.

   The **Retrieve** window appears.

2. To select the search level, such as folder, subfolder, document, or document detail, click the appropriate button or select the appropriate menu option.

   The title bar of the **Retrieve** window displays the search level.

   The search level buttons become enabled if index fields are assigned to the tables.

3. To specify the query, proceed as follows:

   1. If the search must differentiate between uppercase and lowercase letters, select the **Case Sensitive** option.

Note: Whether the **Case Sensitive** check box is enabled or disabled depends on the database sensitivity and the selection of **Support Case Sensitive Indexes** during project configuration.

   2. To define the search type, in the **Rules** column, select one of the following options:

Rules options	
Symbol	**Description**
=	Exact match.
%	Approximate match.
F	Full Text Search. Disables preceding options.

   3. If the field type is Integer, to set the minimum and maximum value for each field in the **From** and **To** columns.

      If only one value is entered, the other is generated automatically and is the same as the entered value.

   4. To search for a range of documents, enter both values.
   5. If the field type is character, enter the entire word **=** or a portion of the word **%** in the **From** column.

The **To** column is disabled for character searches.

4. To execute the query, click **Find.**

   If no records are found, the message **No Records Found** appears above the table. If records are found, the **Retrieve Folder/Subfolder/Document** window is replaced by the **Retrieve Results** window, as described in Retrieve Results Window.

5. To cancel the query, click **Cancel Query.**

Retrieving Documents from Permanent Storage

The **Retrieve Folder** window is used retrieve documents. To retrieve documents, proceed as follows:

1. In the **Retrieve Folder** window, locate documents with specific search criteria.
2. Retrieve documents from permanent storage.

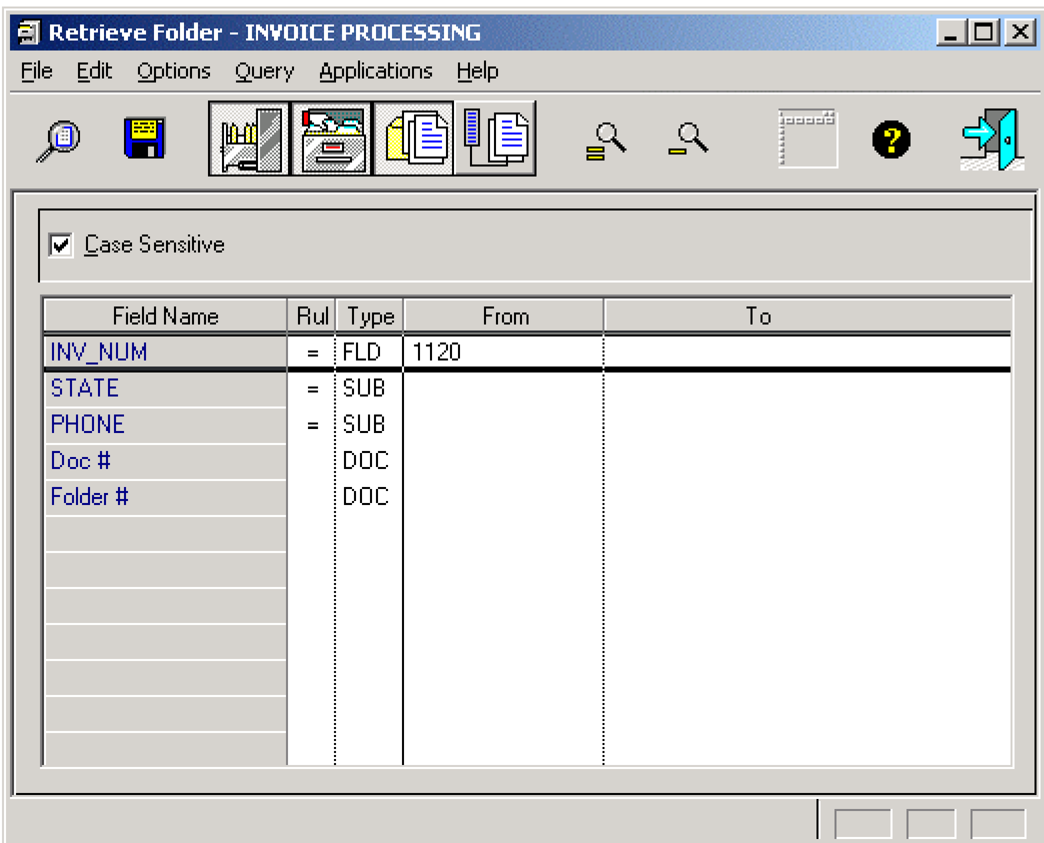


Figure 77: Retrieve Folder window

Retrieve Folder window functions	
Function	**Description**
Menu and button bars	Defines the scope of the query.

Retrieve Folder window functions	
Function	**Description**
Table	Lists all fields defined as query fields within the specified workflow application. Depending on the field type, you can search for either approximate or exact matches. Search for a range of values if the field type is integer.
Field Name	Lists all fields designated as query fields.
Rules	Search type: **Symbol** — **Description** **=** — Exact match. **%** — Approximate match. F — Full text search. For more information on searches, see Retrieving FTS Documents.
Type	Indicates the following table of the field: **Symbol** — **Description** **FLD** — FOLDER table **SUB** — SUBFOLDER table **DOC** — DOCUMENT table **DET** — DOCDETAIL table

Conducting a Search

To conduct a search, in the **Retrieve Folder** window, proceed as follows:

1. In the **Rules** column, click to select an exact match **=** or approximate match **%.**

   Additional options for an approximate search include searching for a whole word or phrase, or just a part of a word or phrase.

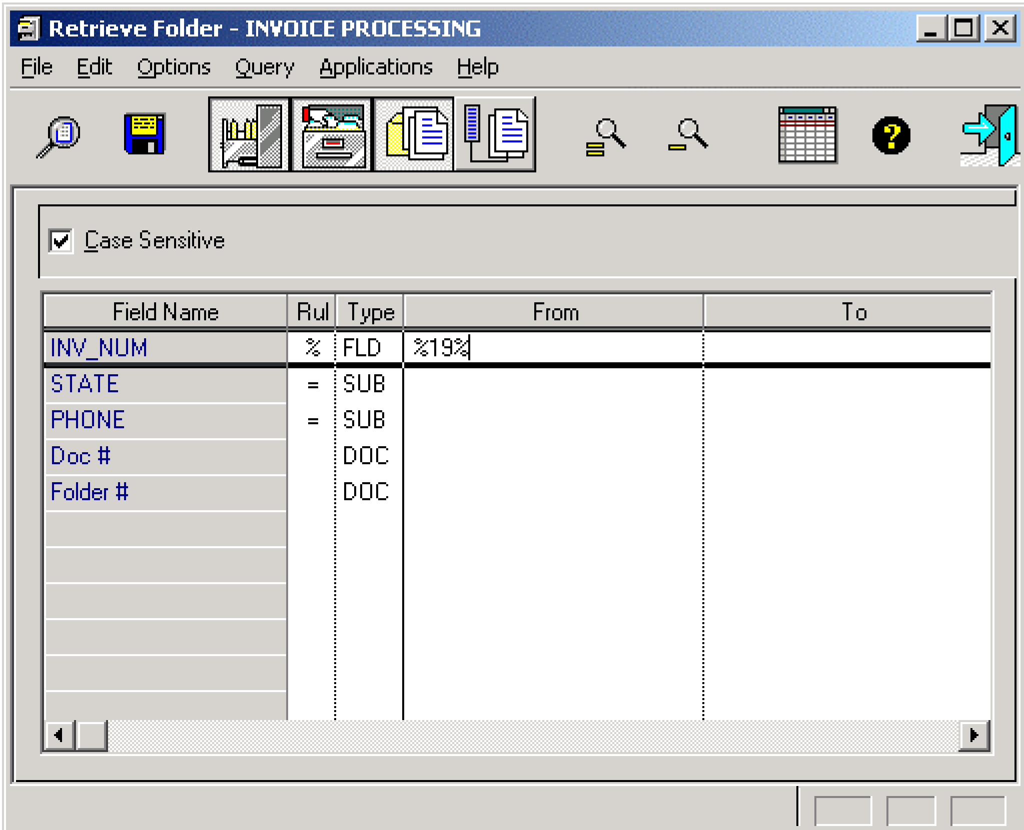


Figure 78: Retrieve Folder window with an approximate query

2. In the **From** field, enter the search criteria.
3. If the field is designated as an integer or date field, to search for a range of records, in the **To** field, enter a value.
4. To specify a search that differentiates between upper and lowercase letters, select the **Case Sensitive** option.

Note: Whether the **Case Sensitive** check box is enabled or disabled depends on the database sensitivity and whether **Support Case Sensitive Indexes** was selected during project configuration.

5. To clear a value from a field, click **Clear.**
6. To clear all values in the window, click **Clear All.**
7. To return to the **Retrieve Results** window, click **Switch to Results.**
8. When all values have been entered, to execute the query, click **Find.**

   If no records are found, the message *No Records Found* appears above the table.

   If records are found, the **Retrieve Folder/Subfolder/Document** window is replaced by the **Retrieve Results** window.

Note: If you perform a search on folders by a field that has the **Word in Text** property enabled, the Retrieve object does not find folders that have words that are less than four characters long in this field. The fields with the **Word in Text** property enabled are identified by the **W** symbol in the **Rul** column. Field properties are configured by administrators.

Retrieve Results Window

The **Retrieve Results** window lists all records that meet the search criteria. The results depend on the type of query performed. If the query was performed on a folder field, folder records are listed. If the field was a subfolder field, subfolder records are listed. If it was a document field, the document records are listed.

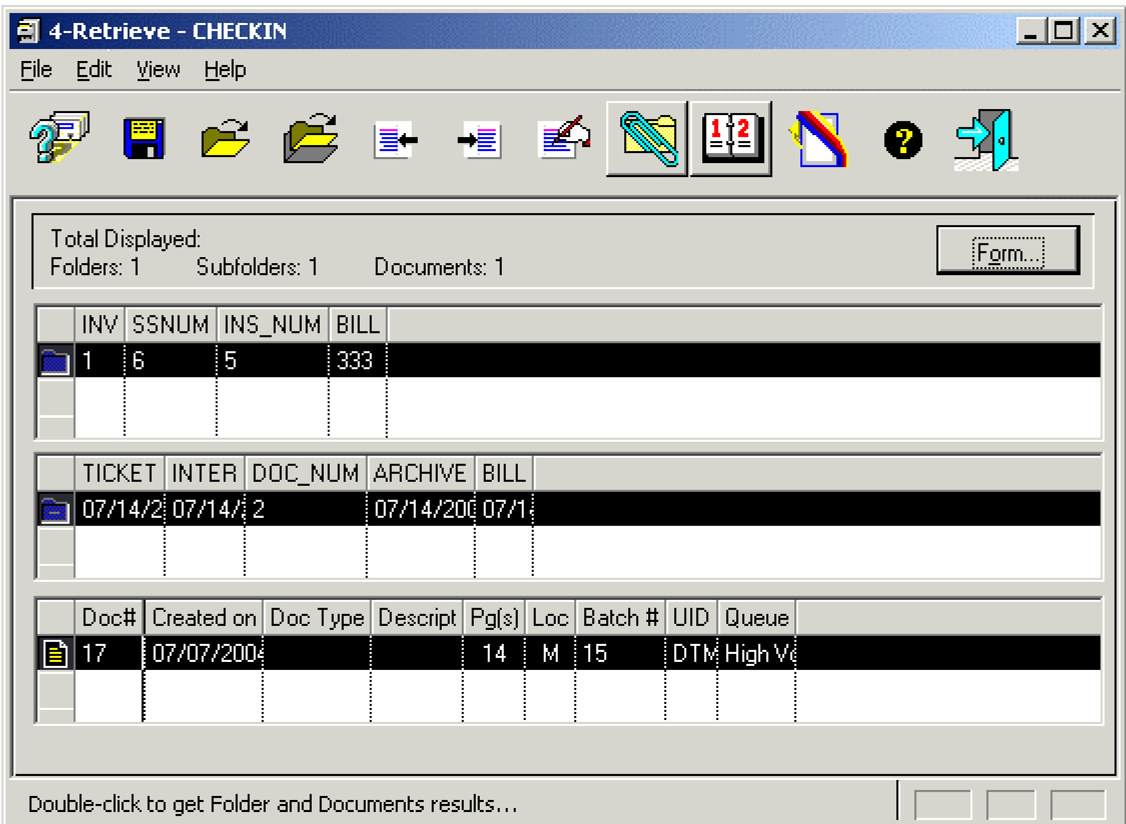


Figure 79: Retrieve Results window

The **Retrieve Results** window has the following sections:

Retrieve Results window features	
Feature	**Description**
Menu and button bars	Correspond to available functions.
Information line	Displays the number of folder, subfolder, and document records located with the search.
Tables	Display folders, subfolders, and documents located with the search.

If the search is performed at the folder level, all subfolders and documents assigned to the selected folder are listed. Documents marked with a **Y** in the **Locked** column are checked out for editing.

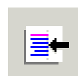
Viewing or Retrieving Documents

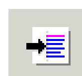
To view or retrieve documents in the **Retrieve Results** window, proceed as follows:

1. To view all documents assigned only to a particular subfolder, click the subfolder.

   If no subfolders are used in your system, only folders and documents are listed.

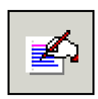
2. If the search is performed at the document level, to view folder and subfolder information, click the document record.
3. To view a selected document in the Image Viewer, click **Left Image Display** or **Right Image Display.**



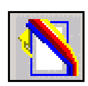


Note: **Right Image Display** provides more options, such as access to Print Server and Stamp Management Utility.

4. To modify a document, click **Modify Image.**

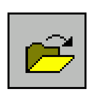


5. To use the Exigen Publisher Collector feature, click **Publisher Collector.**



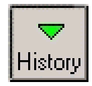
   For information on Exigen Publisher Collector, see Chapter 10: Exigen Publisher Collector.

6. To see all documents in a selected folder, click **Folder View.**



7. To see all documents in a selected subfolder, click **Subfolder View.**

   If the folder history browsing option is configured, and the selected folder is associated with a previous folder, the **History** button is enabled.



8. To view documents in the previous folder, select the folder and click **History.**

   Documents in the previous folder are displayed.

9. To view additional previous folders, click **History** as often as required.
10. To display the previous view, click **Back.**

For information on specifying document display settings, see Specifying Display Settings in Chapter 3: High Volume Scanning.

For information on copying and exporting documents, see Copying and Exporting Documents.

Creating Folders

To create a folder, proceed as follows:

1. In the **Retrieve** window upper pane, right-click and select **New folder.**
2. If role based security is applied to the project, define the folder as described in Assigning a Parcel to a New Folder Using Role Based Security.
3. If ACL based security is applied to the project, define the folder as described in Assigning a Parcel to a New Folder Using ACL Based Security.

Modifying Folders

To modify a folder, proceed as follows:

1. In the **Retrieve** window upper pane, right-click and select **Modify folder.**

   The procedure for modifying a folder is similar to assigning a new folder.

2. If role based security is applied to the project, modify the folder as described in Assigning a Parcel to a New Folder Using Role Based Security.
3. If ACL based security is applied to the project, modify the folder as described in Assigning a Parcel to a New Folder Using ACL Based Security.

Creating Subfolders

To create a subfolder, proceed as follows:

1. In the **Retrieve** window middle pane, right-click and select **New subfolder.**
2. If role based security is applied to the project, define the subfolder as described in Adding a Subfolder Using Role Based Security.
3. If ACL based security is applied to the project, define the subfolder as described in Adding a Subfolder Using ACL Based Security.

When the subfolder is created and does not contain any documents, it does not appear in the subfolders list.

4. To view all empty subfolders, right-click in the **Retrieve** window middle pane, and select **Show empty subfolders.**

Modifying Subfolders

To modify a subfolder, proceed as follows:

1. In the **Retrieve** window middle pane, right-click and select **Modify subfolder.**

   The procedure for modifying a subfolder is similar to assigning a new subfolder.

2. If role based security is applied to the project, modify the subfolder as described in Adding a Subfolder Using Role Based Security.
3. If ACL based security is applied to the project, modify the subfolder as described in Adding a Subfolder Using ACL Based Security.

Sending a Note to the System Administrator

To send a note about a document to the system administrator, proceed as follows:

1. Select the document.
2. Select **File > Send Note to Administrator.**

   The **Send Note to Administrator** dialog appears.

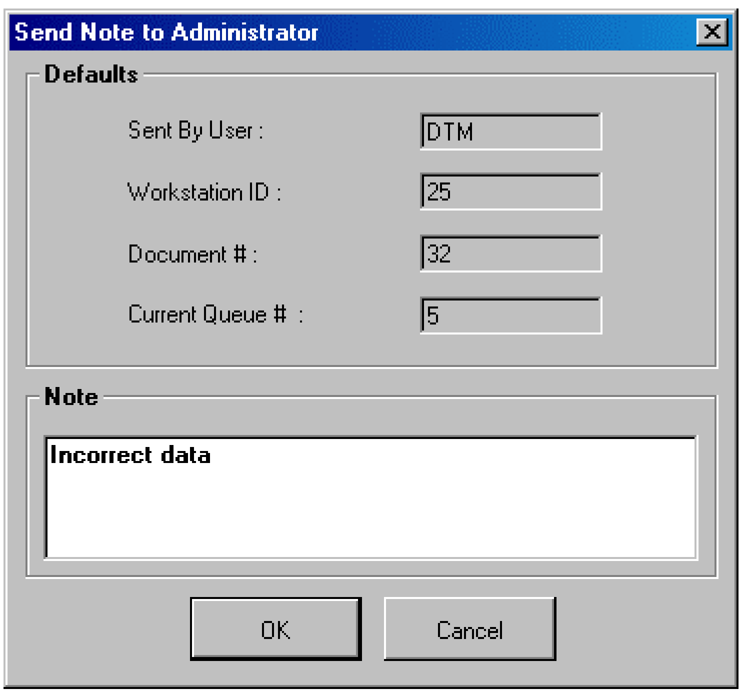


Figure 80: Send Note to Administrator dialog box

The data in the **Defaults** fields provides the administrator with information on the document.

3. To provide additional information on the note, in the **Note** field, enter a message.
4. Click **OK.**

Sorting Documents Using the Sort Function

To sort documents using the Sort function, proceed as follows:

1. To open the Sort window, proceed with one of the following:

- In the documents area, point and right-click. Select **Sort…**
- Select **View > Set Sort Order > Documents.**

  The **Sort** window appears.

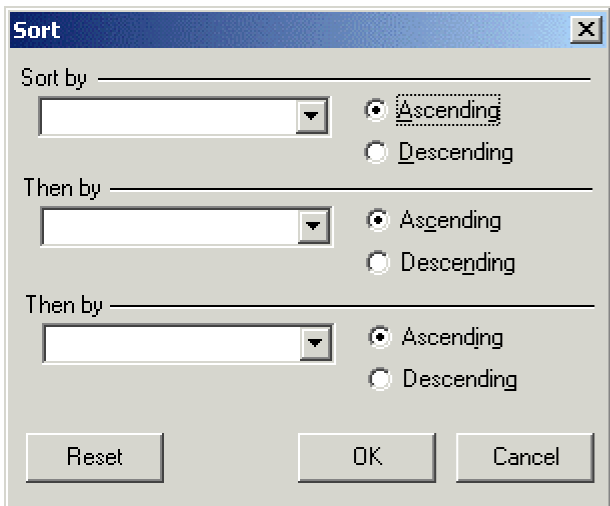


Figure 81: Sort window

2. Select the field to sort by.

   The **Sort By** and **Then By** submenus list all fields that are displayed in the document table. The documents are sorted first by **Sort By** values and then by **Then By** values.

3. To change the sort order, click either **Ascending** or **Descending.**
4. To revert to the default sort order, select **Reset.**
5. To sort folders and subfolders, follow the same steps as for documents.
6. To save a sort setting, select **File > Save Configuration.**

Print Options

The **File** menu in the **Retrieve Results** window has the following print options:

- **Print Folder(s)**
- **Print Subfolder(s)**
- **Print Document(s)**

Note: The **Print Subfolder(s)** command is not available unless a folder is selected.

When **Print Document(s)** is selected, the **Print Document** window appears.

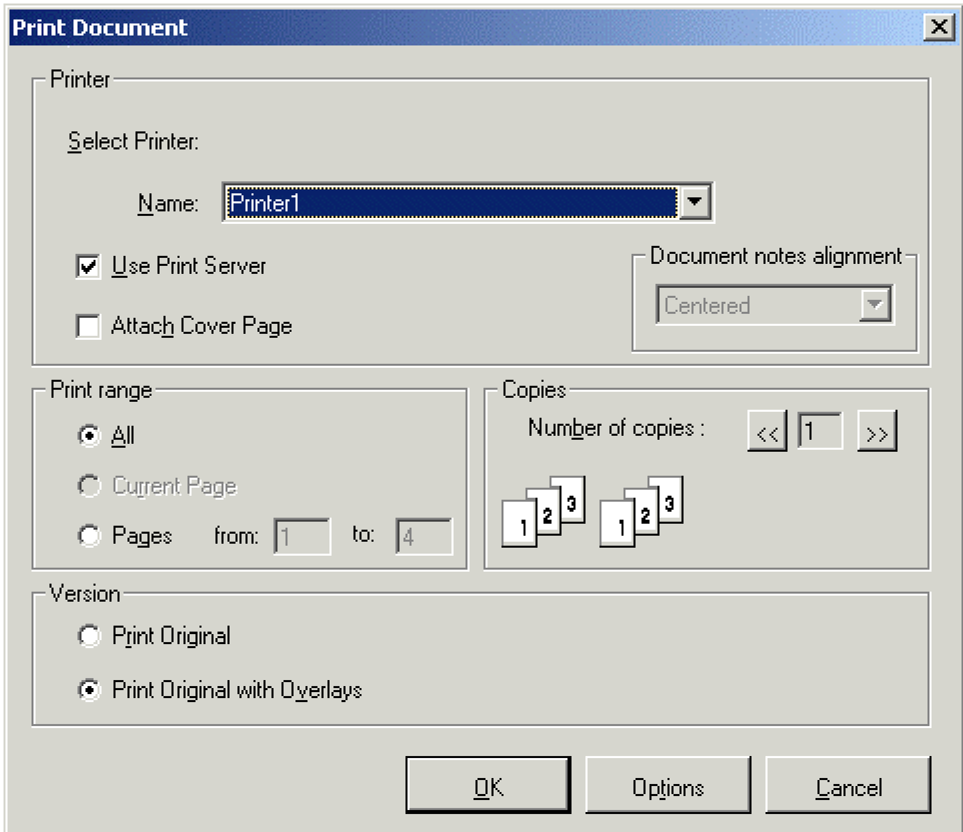


Figure 82: Print Document window

The **Print Document** window has the following options:

Print Document window options	
Option	**Description**
Name	Contains the list of the printer devices.
Use Print Server	Enables Print Server.

Attach Cover Page	Attaches a cover page to the document. A cover page is generated by Exigen Workflow and it contains general information on the printed document. Cover page printing is implemented using a NED image printer driver. Virtual printing is asynchronous, therefore a timeout time should be set. The virtual printing system waits for the NED image driver output. If no output is sent the system considers the situation to be an error. Optimal NED timeout depends on the speed of the computer. For most machines, 5 minutes are sufficient. Timeout is configured through the following registry path:
	`Software\\Exigen\\VisiFLOW\\ImportServer`
	with the following key:
	`VirtualPrintTimeout`
	The numeric value of this key is the NED image printer driver timeout.

Print Document window options	
Option	**Description**
Document notes alignment	Aligns the note text on the document's cover page. The following options are available: • **Left** • **Centered** • **Right** The **Document notes alignment** option is enabled only if the **Attach Cover Page** option is selected.
All	Prints all pages of the document.
Current Page	Prints the current page of the document.
Pages	Sets the range to print only specified pages.
Number of copies	Displays the number of copies you want to print. **<<** and **>>** are used to decrease or increase the number.
Print Original	Prints the original document.
Print Original with Overlays	Prints the document and also applies an overlay.

Options for printing a folder are specified in the **Print Folder** window.

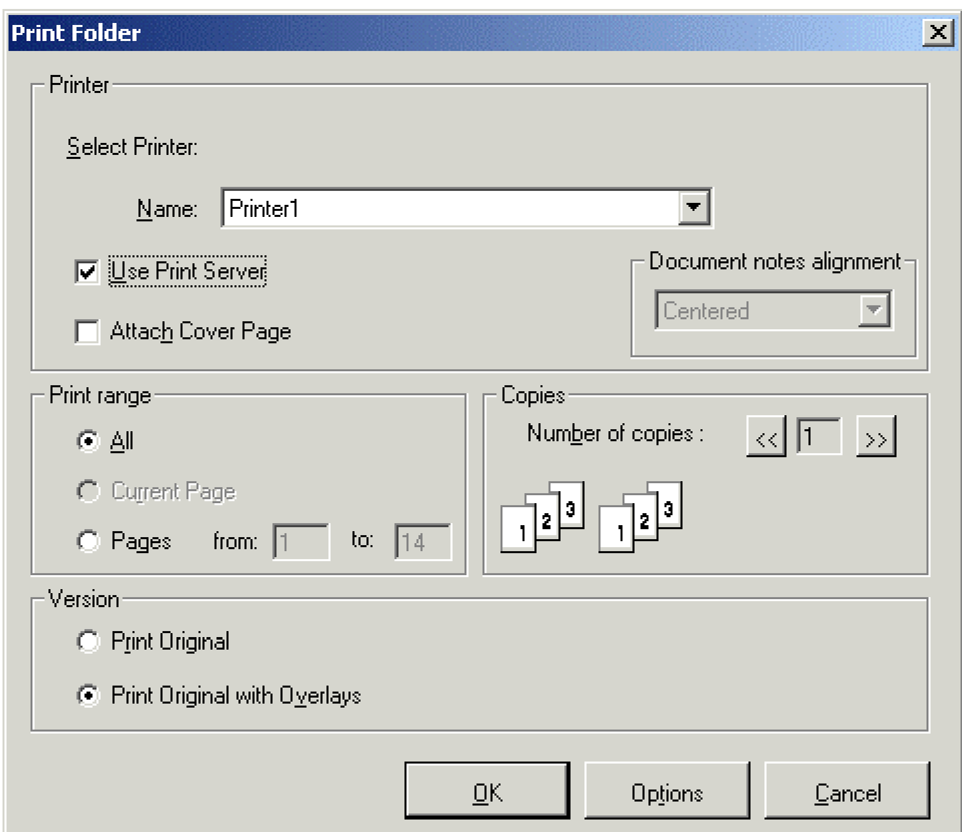


Figure 83: Print Folder window

Generating a General Information Page on Printed Documents

To generate a page containing general information on the printed documents, proceed as follows:

1. Select the **Attach Cover Page** check box.
2. To create one cover page for all printed documents, select the **All Printed Documents** option.
3. To create a cover page for each printed document, select the **Each Printed Document** option.

   A cover page includes the latest note for each document.

Displaying Documents in the Same Batch

To display documents assigned to the same batch as the selected document, proceed as follows:

1. Highlight the document.
2. Select **View > Show Stapled Documents.**
3. To restore the original listing, select **File > Refresh.**
4. To determine whether documents listed are active or on hold, select **View > Show Document Status.**

For information on adding, viewing, modifying, and deleting document details, see Maintaining Document Details in Chapter 4: High Volume Indexing.

Performing an ERM Text Search

If retrieval is performed on ERM documents, there is an additional option to perform a text search on the retrieved ERM documents.

To perform a text search on the retrieved ERM documents, proceed as follows:

1. In the window that displays the list of retrieved documents, select **Edit > ERM Text Search.**

Note: This option is enabled only if the default ERM Report Viewer is selected.

   The **ERM Search** window appears.

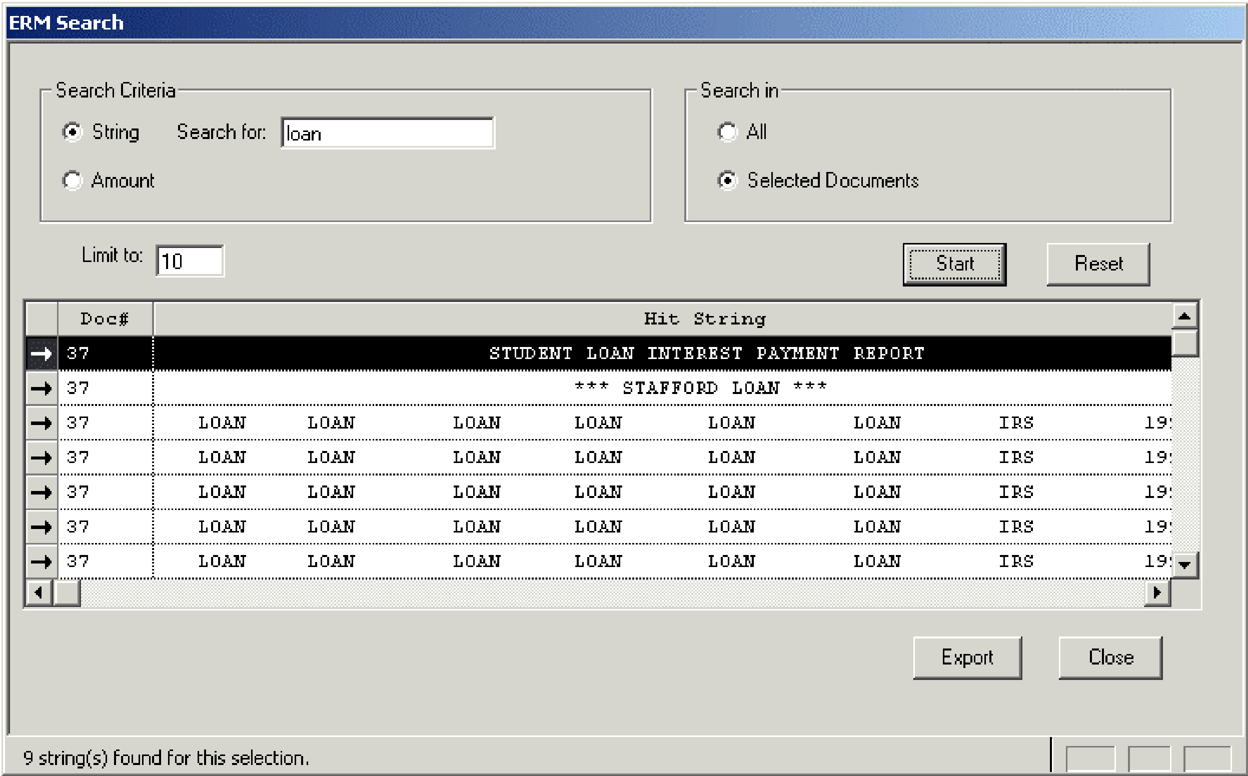


Figure 84: ERM Search window

2. In the **Search Criteria** box, select one of the following options:
   - To perform a word search, select **String.**

     The **Search for** field appears in the **Search Criteria** box.
   - To perform a search for a range of numeric values, select **Amount.**

     The **From** and **to** fields appear in the **Search Criteria** box.
3. In the **Search Criteria** box, in the fields, enter search values.
4. In the **Search in** box, select one of the following options:
   - To perform the search on all retrieved ERM documents, select **All.**
   - To perform the search only on the selected ERM documents, select **Selected Documents.**
5. In the **Limit to** field, enter the maximal number of returned search results.
6. To perform the search, use buttons as described in the following table:

ERM Search window buttons	
Button	**Description**
Start	Performs a text search according to the search criteria entered.
Reset	Clears all fields in the **ERM Search** window and resets the window to the initial state.
Export	Exports search results to a text file.
Close	Closes the **ERM Search** window.

Search results are displayed in the table with the following columns:

Search results window columns	
Column	**Description**
Doc#	Document number that contains the entered string or numeric value.
Hit String	Document line that contains the entered string or numeric value.

7. To open a document, in the table, double-click an entry.

   The corresponding document is opened and the search string or number is highlighted.

Retrieving FTS Documents

Exigen Workflow provides a **Full Text Search** feature that searches for documents based on text contained in the documents. These text values are stored in special tables named indexes. The **FTS Index** is created by adding all words in text files, except stopwords to the list. Stopwords are not case sensitive.

Creating indexes and defining stopwords are administrative processes and are described in the *Exigen Workflow Administrator' s Guide*, *Part 1: Design and Configuration*, Chapter 3: Creating Projects. The Retrieve object is used to perform a search on a document.

The following topics are described in this section:

- Full Text Search Overview
- Retrieving Documents with Full Text Search
- Using the Full Text Search Window
- Performing a Full Text Search
- Reviewing Search Words
- Performing a Telephone Number Search

Full Text Search Overview

FTS document retrieval allows you to search for documents based on text contained in the documents. It also allows you to perform fuzzy searches. A **fuzzy search** finds words that are similar. The **Soundex** option in FTS involves searching for words that sound similar in English. For example, a search for the word *see* retrieves the words *see* and *sea*. FTS document retrieval can also search for phrases.

A successful search displays the number of queried words found in a given document and the document rating. A document rating is calculated based on exact matches and approximate matches. For example, two exact matches of words are rated higher than three approximate matches of words that sound similar.

Two columns, **Rating** and **Words,** display this information in the **Retrieve Results** window as described in Using the Full Text Search Window.

Retrieving Documents with Full Text Search

To retrieve documents, proceed as follows:

1. In Exigen Workflow Explorer, double-click **Retrieve.**

   The **Retrieve** window appears.

2. Specify your query as follows:
   1. Click the **Full Text Search** row.

      The **Full Text Search** window appears.

   2. In the **Full Text Search** window, set the conditions for a fuzzy search and other parameters as described in Using the Full Text Search Window.
   3. Enter a word or phrase to search for.
   4. Click **OK.**
   5. If required, in the **Retrieve** window, define additional search criteria.

Note: Full text searches are case sensitive.

3. To execute the query, click **Find.**

   If no records are found, the message **No Records Found** appears above the table, and the **Full Text Search** window is reopened.

   If records are found, the **Retrieve** window is replaced by the **Retrieve Results** window. As the **Retrieve Results** window is displayed, the documents are shown in the Image Viewer. All found words are highlighted.

For information on the **Retrieve** window, see Retrieving Documents from Permanent Storage.

For information on the **Retrieve Results** window, see Retrieve Results Window.

Using the Full Text Search Window

Settings for a full text search are specified in the **Full Text Search** window.

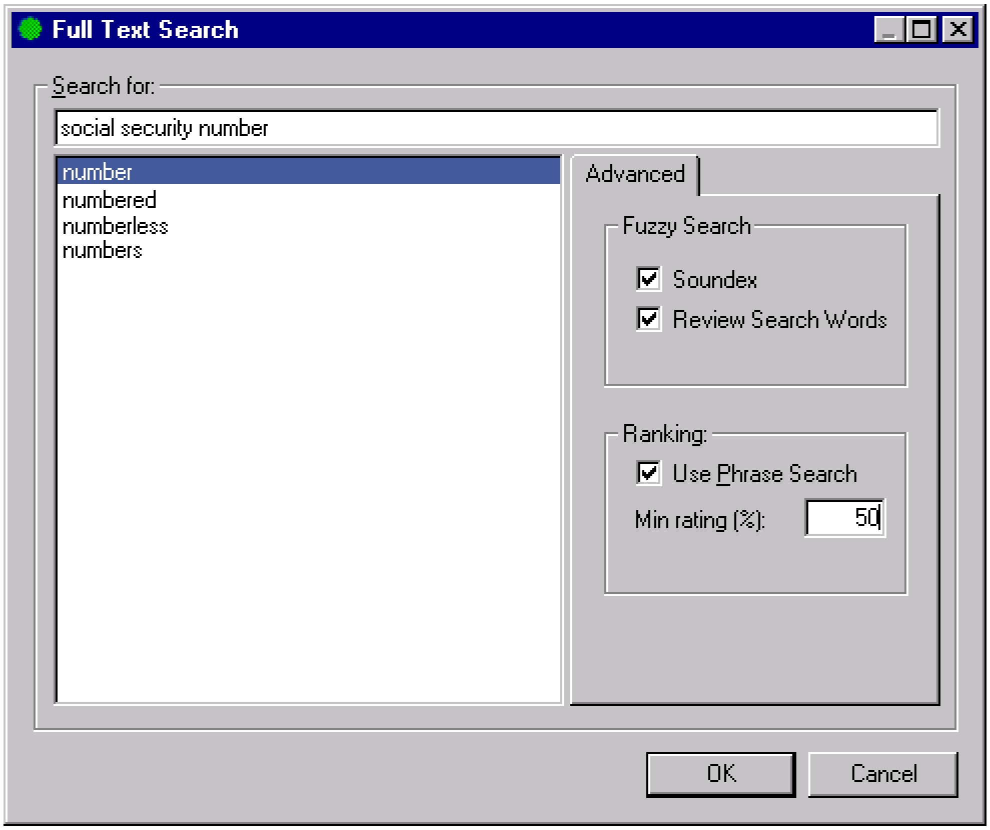


Figure 85: Full Text Search window

Performing a Full Text Search

To perform a full text search, in the **Full Text Search** window, proceed as follows:

1. In the **Search for** field, enter a word, words, or phrase to search for.

   In the field beneath the **Search for** field, the application lists all words that start with the letters entered. The listed words are part of the main index created by FTS Server.

2. If the fuzzy search is required, in the **Advanced** tab, specify the fuzzy search options as described in the following table:

Advanced tab search options	
Option	**Description**
Soundex	Expands the search to include words that sound similar in English.
Review Search Words	Allows review of the required words from a list of words obtained with the fuzzy search as described in Reviewing Search Words.
Use Phrase Search	Searches for a whole phrase.

   The search rating is calculated based on the proximity of the phrase words to each other in the document. For example, if the phrase words are in the same row, the rating is 100%; if they are on different pages, the rating is less than 50%.

Note: Phrase search ranking is not case sensitive.

3. To narrow the search result, in the **Min Rating (%)** field, enter the minimal rating for the words and phrases.
4. To save changes, click **OK.**
5. To cancel changes, click **Cancel.**

Reviewing Search Words

If you select **Review Search Words** in the **Full Text Search** window, the **Word review** window appears, listing all words used as search criteria.

Note: This is useful only if the **Soundex** option is selected. If not, only the entered search word is displayed in the **Word review** window.

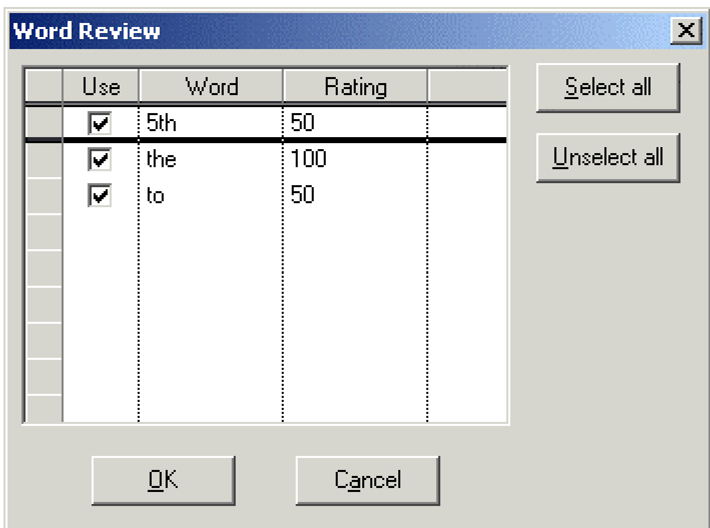


Figure 86: The Word review window

The **Word review** window contains a list of all words created using the Soundex option. The **Rating** column displays the rating for each word. The word rating is calculated as a percentage using a special algorithm showing the word's similarity with the search word. 100% percent means that the word in the list matches the word entered as the search word.

To perform a search based on words in the **Word review** window, proceed as follows:

1. In the **Word review** window, select the words to be used as search criteria:
   - To select all words, click **Select All.**
   - To unselect all words, click **Unselect All.**
   - To select several words in the list, in the **Use** column, select the required check boxes.
2. To perform the search, click **OK.**

Performing a Telephone Number Search

If the telephone index plug-in is added to the project full text search configuration, a full text search can be performed for specific telephone numbers.

For information on configuring full text search plug-ins, see *Exigen Workflow Administrator's Guide, Part 3: Utilities,* Chapter 5: Full Text Search Maintenance Utility.

If the required plug-in is added to the full text search configuration, the **Full Text Search** window contains a tab named **Special Indexes.**

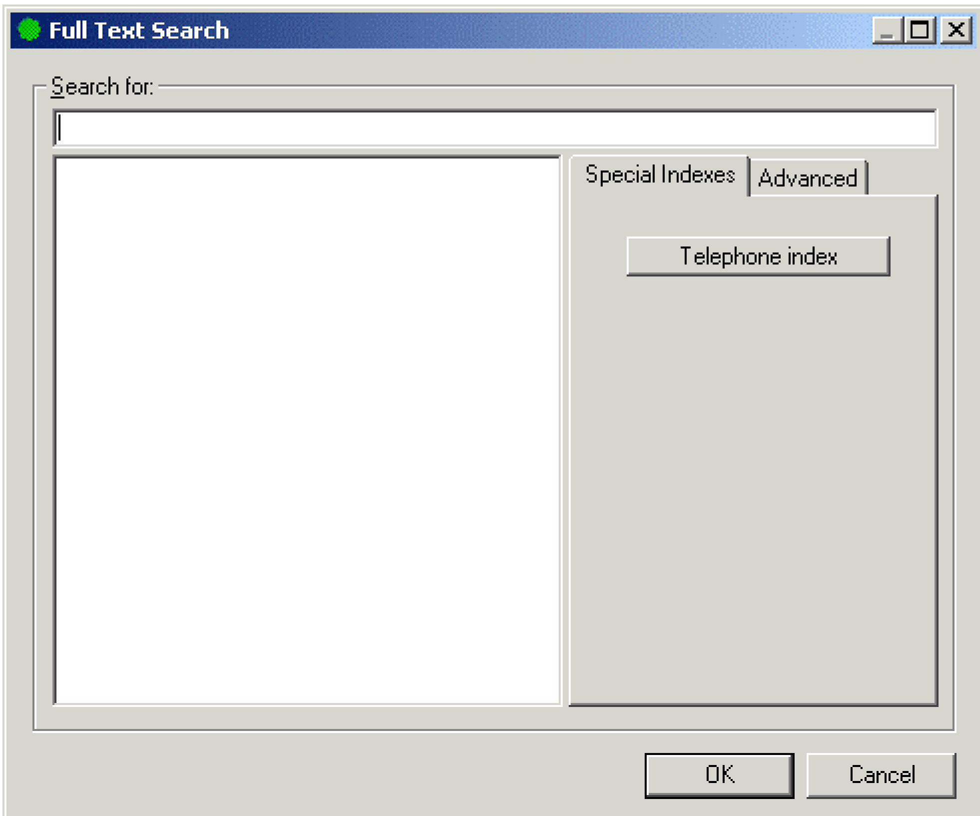


Figure 87: Full Text Search window, Special Indexes tab

To perform a full text search with the telephone index, proceed as follows:

1. In the **Full Text Search** window, in the **Special Indexes** tab, click **Telephone index.**

   The **All Indexed Numbers** window appears.

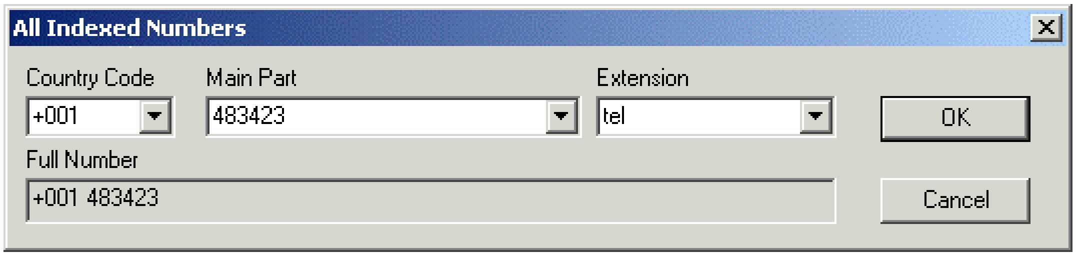


Figure 88: All Indexed Numbers window

2. Specify the criteria for telephone numbers to search for as described in the following table:

Telephone number search criteria	
Telephone number component	**Description**
Country Code	Country code.
Main Part	Telephone number.
Extension	Telephone number extension, for example *tel, fax,* or other.

The specified telephone number is displayed in the **Full Number** field.

3. To accept the specified telephone number, click **OK.**
4. To cancel the telephone number search, click **Cancel.**
5. In the **Full Text Search** window, click **OK.**
6. In the main **Retrieve** window, click **Find.**

Work Item Submitter

Work Item Submitter provides tools for selecting specific documents, creating work items from these documents, and sending them to the next queue in the workflow.

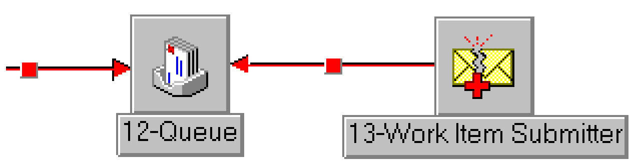


Figure 89: Workflow map with the Submitter object

Note: If this link is not specified in the workflow map, Work Item Submitter works as a standard Retrieve object.

Submitting a Work Item

Work items can be submitted by either of the following methods:

- creating a collection in the **Document Collector** window and sending it
- selecting documents directly in the **Work Item Submitter** window and sending them

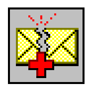
The following topics are included in this section:

- Creating and Submitting a Document Collection
- Submitting Selected Documents

Creating and Submitting a Document Collection

To submit work items using the **Document Collection** window, proceed as follows:

1. In Exigen Workflow Explorer, double-click **Work Item Submitter.**



The **Retrieve Folder** window appears.

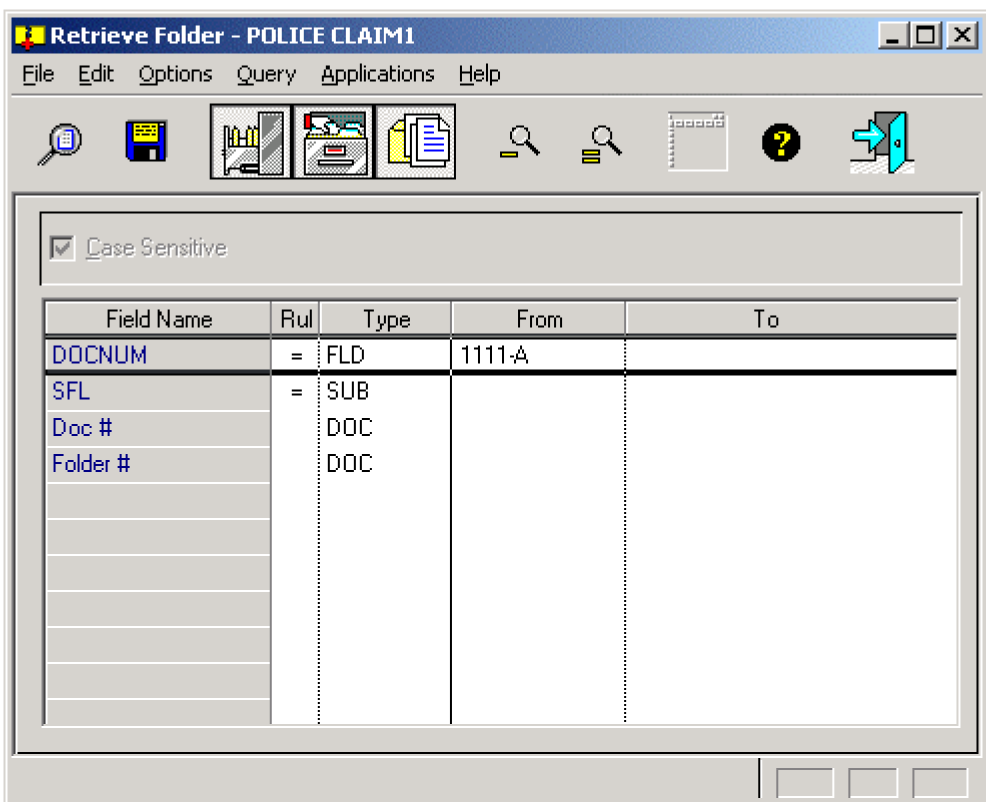


Figure 90: Work Item Submitter/Retrieve window

2. Perform queries at the folder, subfolder, or document level.

Queries are performed as in the Retrieve object as described in Retrieving Documents.

The **Work Item Submitter** window displays a list of all records that meet the search criteria.

3. To open the **Document Collector** window, select **View > Show/Hide Document Collector Window.**

Note: The **Show/Hide Document Collector Window** menu command is available only if Work Item Submitter has a link to another node.

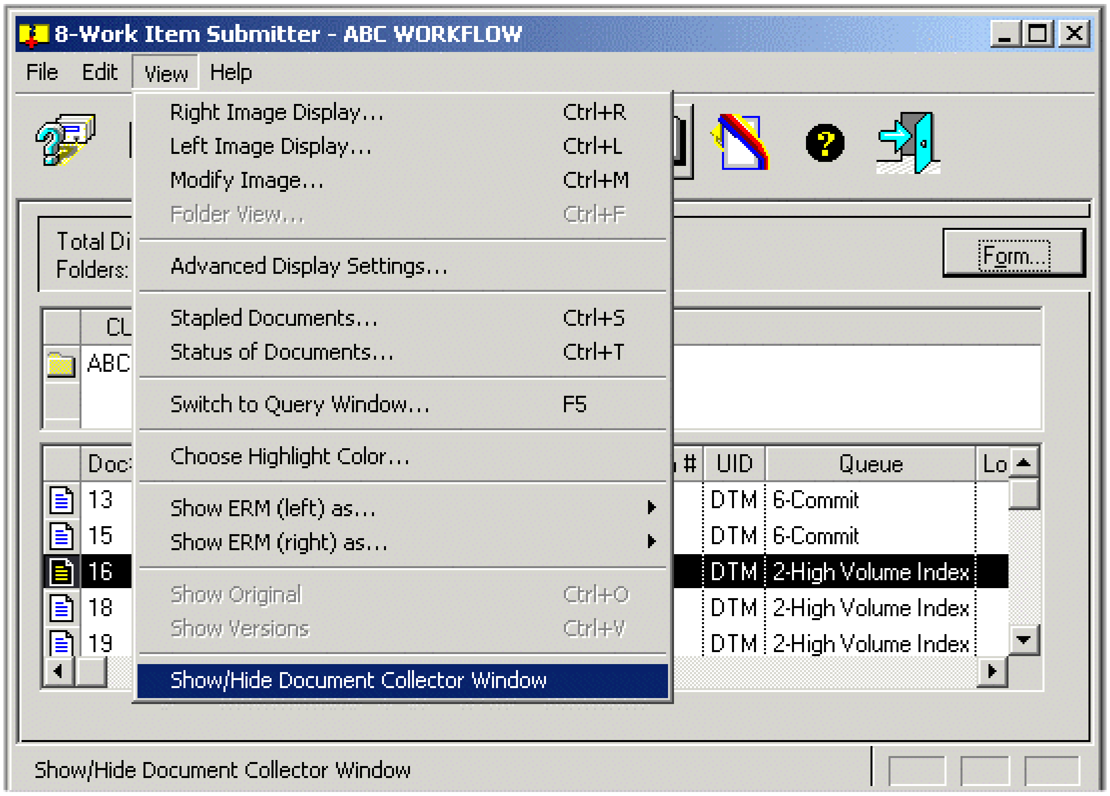


Figure 91: Work Item Submitter window

The **Document Collector** window appears.

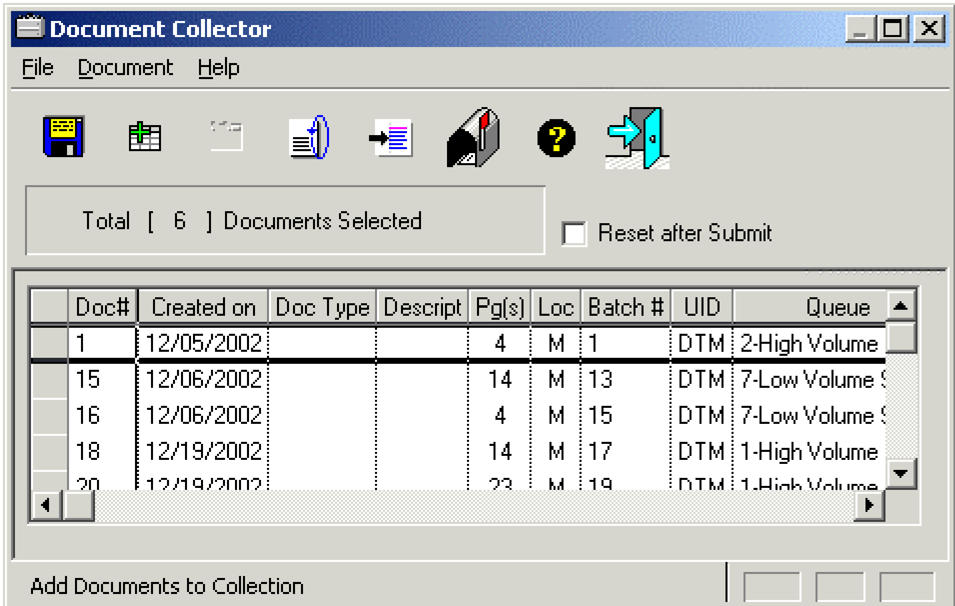
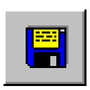
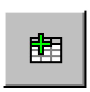
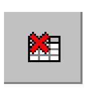
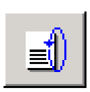
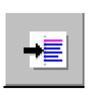
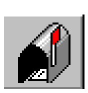
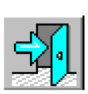


Figure 92: Document Collector window

4. To perform the following operations, click the appropriate button:

Document Collector Window options		
Button	**Menu option**	**Description**
	**Save window configuration**	Saves the configuration of the **Document Collector** window.
	**Add documents to collection**	Adds the selected document to the document list in the **Document Collector** window.
	**Delete documents from collection**	Removes the selected document from the document list.
	**Clear document collection**	Removes all documents from the **Document Collector** window. **Note:** If the **Reset after Submit** option is selected, the document collection is cleared automatically after documents are sent.
	**Right Image Display**	Displays the selected document in Image Viewer.
	**Submit documents**	Sends the selected documents to the next node in the workflow. The **Send Parcels To** window is opened to specify send settings.
	**Close window**	Closes the **Document Collector** window.

Documents from different folders can be included in the **Document Collector** window. For each folder, the system creates a separate parcel that is sent along the workflow.

If the document is in workflow processing, the following actions can occur:

- By default, a reference document is created in a new parcel.
- If the **Copy Documents** option is selected in the **Send Parcel(s) To** window, the document is copied to a new parcel.

If the document is not in workflow processing, the following actions can occur:

- By default, the system places the document in a new parcel.
- If the **Copy Documents** option is selected in the **Send Parcel(s) To** window, the document is copied to a new parcel.

Exigen Workflow can be configured to display a message if the user tries to send a document that already has a parcel. To configure this option, in the `visiclt.ini` file, in the `[setup_archive]` section, enter the following parameter and value:

```
CreateReferenceOnSend=PROMPT
```

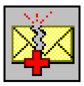
The following table describes the values for the `CreateReferenceOnSend` parameter:

CreateReferenceOnSend parameter values	
Value	**Description**
`PROMPT`	Message appears to ask the user whether a reference document must be created and sent.
`YES`	Document is sent with a parcel.
`NO`	Message appears to inform the user that the document is currently in the workflow and cannot be sent.

Submitting Selected Documents

To retrieve, select, and submit documents, proceed as follows:

1. In Exigen Workflow Explorer, double-click **Work Item Submitter.**

   The **Retrieve Folder** window appears.

2. Perform queries at the folder, subfolder, or document level.

   Queries are performed as described in Retrieving Documents.

   The **Work Item Submitter** window displays a list of all records that meet the search criteria.

3. To select a single document, click it.
4. To select a list of documents, click the first document to be included, hold down the **SHIFT** key, and click the last document to be included.

5. To select individual documents, press **CTRL** and click the individual documents.
6. To submit the documents, press **F10** or right-click the selected list and select **Submit documents.**

   The **Send Parcel(s) To** window appears.
7. Enter values in the **Send Parcel(s) To** window as described in Sending Parcels or Documents.
8. When all values are entered, click **OK.**

The documents are sent.

Note: When using this method to send documents, only selected documents are sent, and the contents of the **Document Collector** window are irrelevant.

For information on copying and exporting documents, see Copying and Exporting Documents.

In Work Item Submitter, folders can be created and modified in the same way as in Retrieve object. For information on creating folders, see Creating Folders. For information on modifying folders, see Modifying Folders.

Chapter 10: Exigen Publisher Collector

This section describes the Exigen Publisher Collector utility.

The following topics are described in this section:

- Overview
- Preparing to Create a Data Collection
- Creating a Collection
- Collection Contents

Overview

Exigen Publisher is a subsystem of the Exigen Workflow system. It is used to create a collection of documents that are viewable remotely without being connected to the Exigen Workflow system database. With Exigen Publisher, all the required documents from the Exigen Workflow database can be gathered into one data collection and copied on a compact disk (CD), which can be run from a machine that is not connected to Exigen Workflow.

Exigen Publisher consists of the following components:

- Exigen Publisher Collector
- Exigen Publisher Packager
- Exigen Publisher Cabinet

The following diagram shows how the components of the system work together:

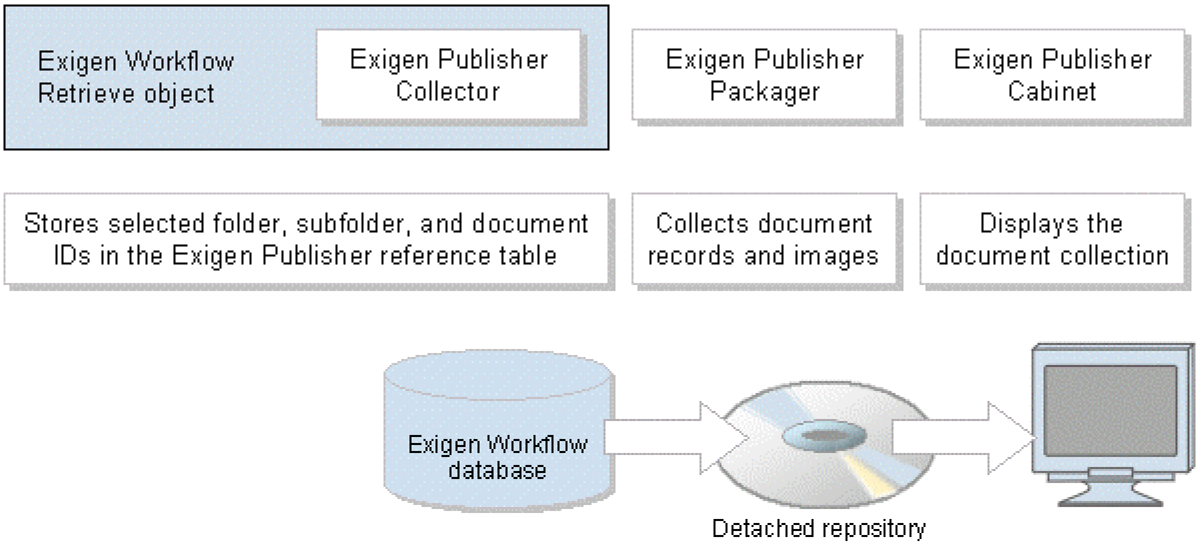


Figure 93: Data publishing process with Exigen Publisher

Exigen Publisher Collector

Exigen Publisher Collector collects documents from an Exigen Workflow project into one collection. Each data collection consists of image files, folders, subfolders, and document records collected within the existing Exigen Workflow database. Exigen Publisher Collector is run from the Exigen Workflow Retrieve object.

Exigen Publisher Packager

After a collection of folder, subfolder, and document records and images is created, the user can run Exigen Publisher Packager to package the data collection with the Exigen Workflow system files into one directory, which can be written onto a CD. A recipient of the CD also receives Exigen Publisher Cabinet on the CD.

Exigen Publisher Cabinet

Exigen Publisher Cabinet is used for viewing the data collection that was packaged onto the CD without being connected to the Exigen Workflow system.

Exigen E-Forms documents cannot be viewed in Exigen Publisher Cabinet.

Exigen Publisher components must be installed when installing the Exigen Workflow system. For information on installing Exigen Workflow, see the *Exigen Workflow Installation Guide*.

Preparing to Create a Data Collection

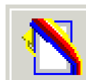
Exigen Publisher Collector is run from the Exigen Workflow Retrieve object to create the data collection.

Before using Exigen Publisher Collector, perform the following preliminary tasks:

1. In the selected Exigen Workflow project, open the Retrieve object and perform a document search.

   For more information on the Retrieve object, see Chapter 9: Document Retrieval.

2. To start **Exigen Publisher Collector,** in the **Retrieve Results** window, click **Exigen Publisher.**



Note: The Publisher Collector object must be added to the project in the Administrator Utilities.

Creating a Collection

Further actions depend on whether or not collections were created. The following topics are described in this section:

- Creating the First Collection
- New Collection Window
- Adding, Modifying, or Deleting a Collection

Creating the First Collection

If collections were not created, you are prompted to create a new collection.

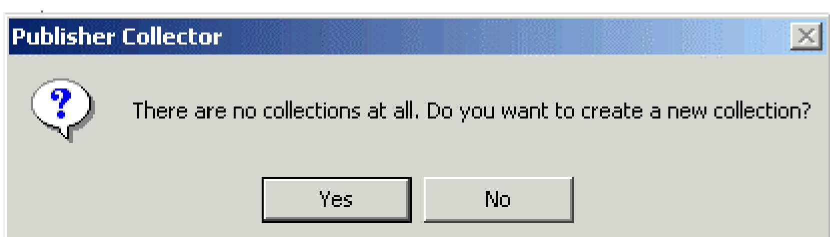


Figure 94: Prompt for creating a new collection

To create the first collection, proceed as follows:

1. In the **Publisher Collector** dialog, click **Yes.**

   The **New Collection** window appears.

2. In the **New Collection** window, make appropriate entries as described in [New Collection Window](#).
3. Click **OK.**

   The **Collections** window appears.

4. To modify or delete a collection, or to specify collection parameters, in the **Collections** window, make appropriate entries as described in [Adding, Modifying, or Deleting a Collection](#).

New Collection Window

In the **New Collection** window, the name and description of a new collection can be entered.

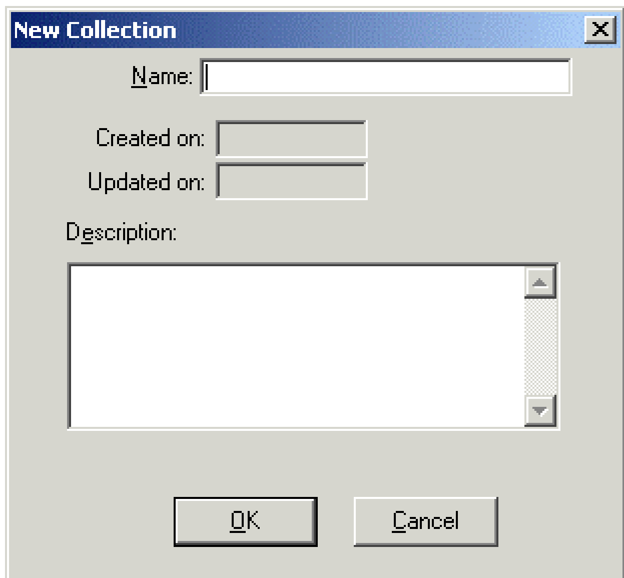


Figure 95: Collection parameters window

The following table describes the fields in the **New Collection** window:

Fields in New Collection window	
Field	**Description**
Name	Collection name.
Created on and **Updated on**	Fields that automatically show when the collection was created and last updated.
Description	Collection description. This field is optional. The description is applied as the collection name in Exigen Publisher Cabinet.

Adding, Modifying, or Deleting a Collection

In the **Collections** window, you can perform the following actions:

- create a new collection

- modify a description of the selected collection
- delete a collection
- select a collection for modifying its contents

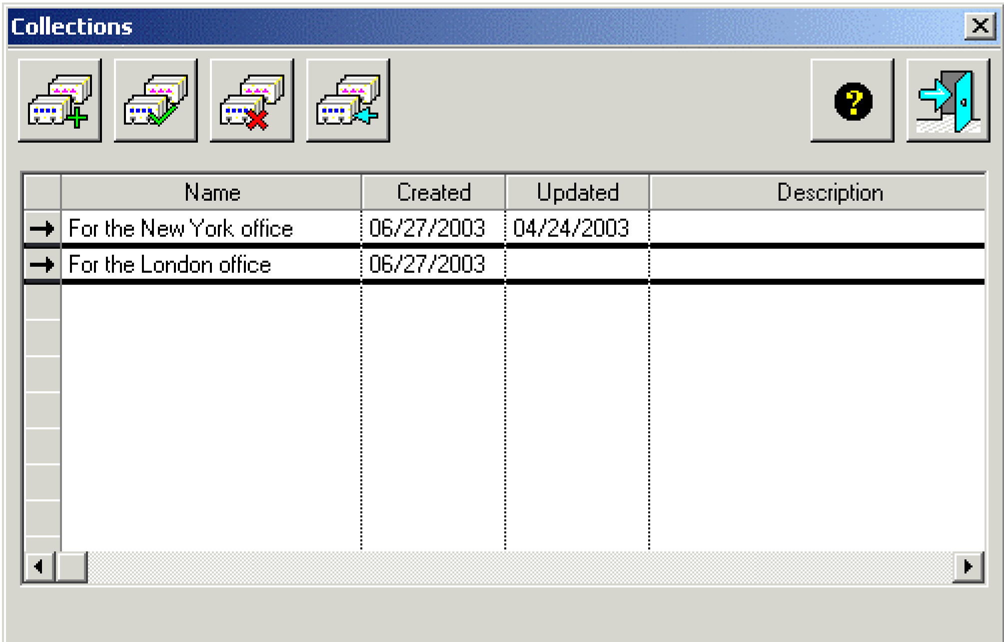
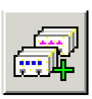


Figure 96: Collections window

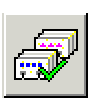
The **Collections** window lists all data collections. The collections are listed in the table. The column headings are collection parameters edited in the **Collection parameters** window.

To add, modify, or delete a collection, proceed as follows:

1. To open the **New Collections** window for a new collection, click **New Collection.**

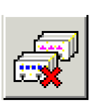
   

2. To modify collection parameters, in the **Collections** window, select the collection in the table and click **Modify Collection.**

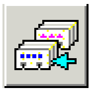
   The **Modify Collection** window appears with the description of the current collection. The description can be modified.

3. To delete a collection, select the collection in the table and click **Delete Collection.**

A window prompting you to confirm that you want to delete the collection appears.

4. To open the **Publisher Collector** window and set collection parameters, select the collection and click **Select Collection.**



5. Specify the required folders, subfolders, and documents for the collection as described in Specifying Collection Contents.

Collection Contents

The following topics are described in this section:

- Collection Contents Overview
- Publisher Collector Window
- Specifying Collection Contents

Collection Contents Overview

Exigen Publisher Collector provides the following alternatives for creating collections:

- manually selecting folders, subfolders, and documents to create a collection
- using a query to create the collection
- using both manual and query methods to create the collection

The query method adds documents that meet specified criteria. For example, a query can be used to create a collection of all documents having a field with a particular customer name.

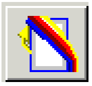
Adding documents to a collection is a flexible process that is not dependent on time. A collection can be defined at a certain time, but packaged much later. Between the time a collection is defined and packaged, documents can be added to or removed from the collection.

It is possible to add a whole folder to a collection, leaving one or several documents or subfolders out of the collection. It is also possible to add several documents to a collection without including the folder or subfolder.

When a collection is created, documents or folders are not copied into a separate repository. Documents, subfolders, and folders from the Exigen Workflow database are assigned to a collection. This means that the actual content of a collection changes when revisions are made in its original Exigen Workflow project. If you add documents to a collection, only these particular documents are included in the collection. If you add a folder to a collection, all documents that are indexed to the folder are included in the collection. Some of these documents can be added to or deleted from the collection before it is packaged. Documents can be added to or deleted from the collection before it is packaged by adding the documents to or removing them from a folder. For a query-based collection, documents can be added to or removed from the collection by changing document indexing information.

Publisher Collector Window

If collections were created, to open the **Publisher Collector** window, click **Exigen Publisher.**



This window can also be accessed from the **Collections** window by selecting a collection and clicking **Select collection.**

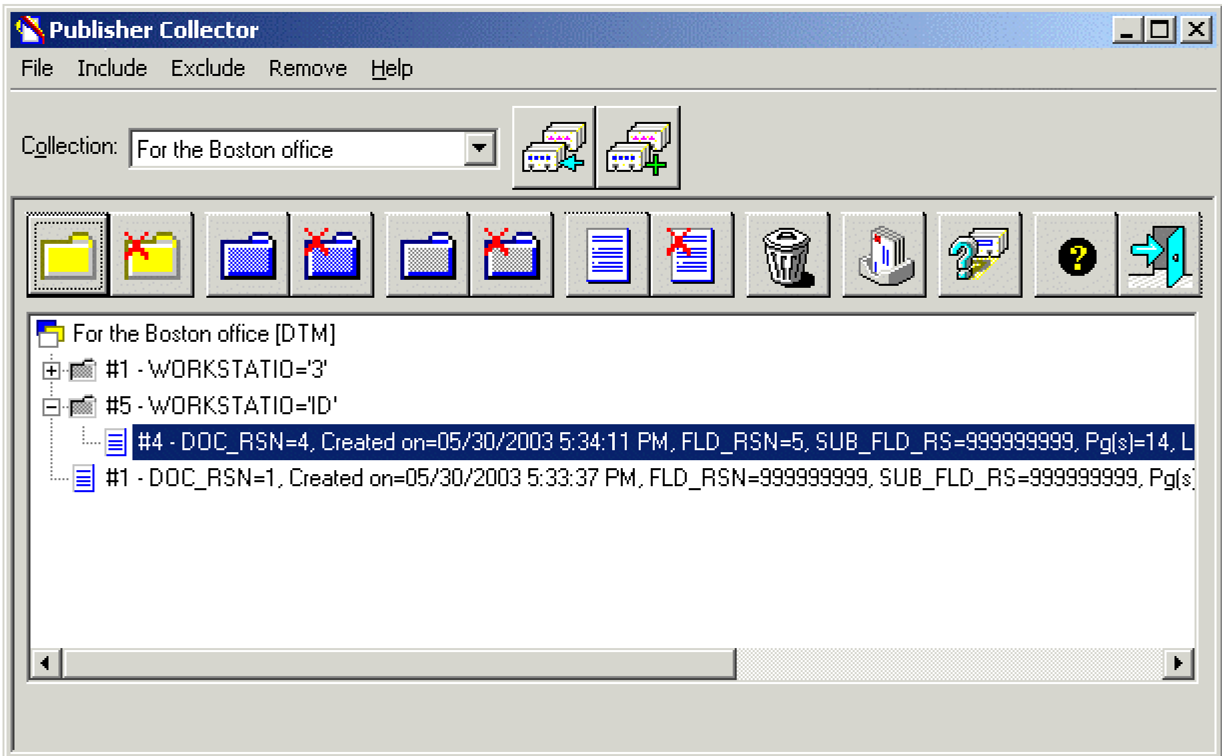


Figure 97: Exigen Publisher Collector window

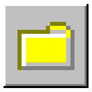
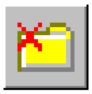
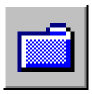
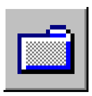
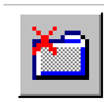
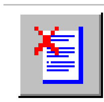
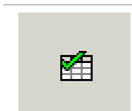
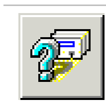
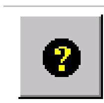
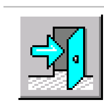
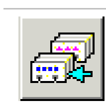
The **Publisher Collector** window appears while the **Retrieve Results** window remains open in the background.

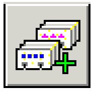
The following topics are included in this section:

- Publisher Collector Window Buttons
- Publisher Collector Window Tree Structure
- Manually Specified Collection Example
- Query-Based Collection Example
- Mixed Collection Example

Publisher Collector Window Buttons

The following table describes the **Publisher Collector** window buttons:

Publisher Collector window buttons		
Button	**Menu Option**	**Description**
	**Include > Folder**	Includes the selected folder in the collection.
	**Exclude > Folder**	Excludes the selected folder from the collection.
	**Include > Default Subfolder**	Includes the selected default subfolder in the collection.
	**Exclude > Default Subfolder**	Excludes the selected default subfolder from the collection.
	**Include > Subfolder**	Includes the selected subfolder in the collection.
	**Exclude > Subfolder**	Excludes the selected subfolder from the collection.
	**Include > Document**	Includes the selected document in the collection.
	**Exclude > Document**	Excludes the document from the collection.
	**Remove**	Removes the selected item from the collection.
	**Add found documents**	Includes all documents retrieved during the last query in the collection.
	**Add search filter**	Adds a filter for creating a collection. The filter settings match those of the last query performed in the **Retrieve** window.
	**Help**	Displays context help.
	**Exit**	Closes the window.
	**Collection > Select**	Opens the **Collections** window.

Publisher Collector window buttons		
Button	**Menu Option**	**Description**
	**Collection > New**	Creates a new collection.

Publisher Collector Window Tree Structure

The selected collection items can be viewed as a tree in the **Publisher Collector** window. The collection items are displayed with their corresponding field names and values.

Including and excluding collection items allows you to create a collection with specific folders, subfolders, and documents. For example, you can include a folder into a collection, but exclude a particular subfolder or document from the collection.

Manually Specified Collection Example

The following is an example of a manually specified collection:

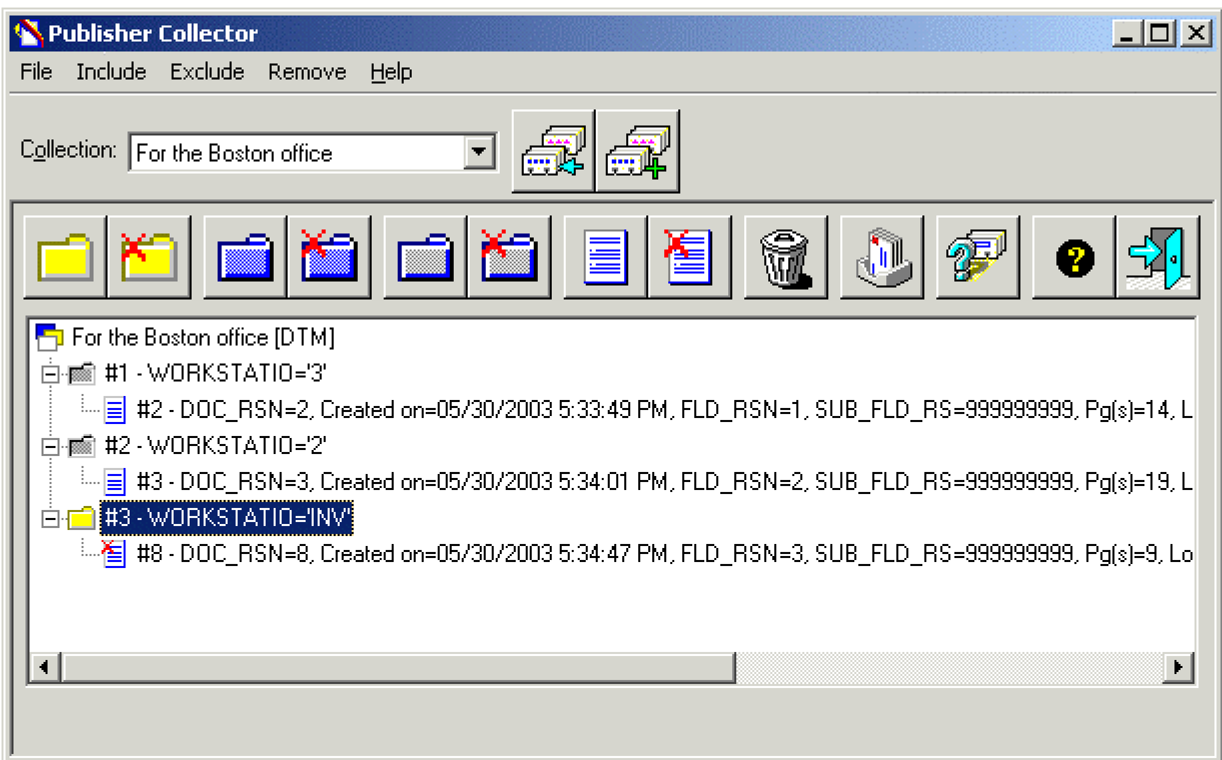


Figure 98: Manually specified collection

In the example, the collection contains the following items:

- It includes document 2 in folder 1. No other documents from folder 1 are included in the collection.
- It includes document 3 in folder 2. No other documents from folder 2 are included in the collection.

- It includes all documents in folder 3 except document 8.

For information on manually selecting collection contents, see Manually Selecting Collection Contents.

Query-Based Collection Example

In the following example, a query is performed in the **Retrieve** window. The filter used for the query is assigned as the collection filter.

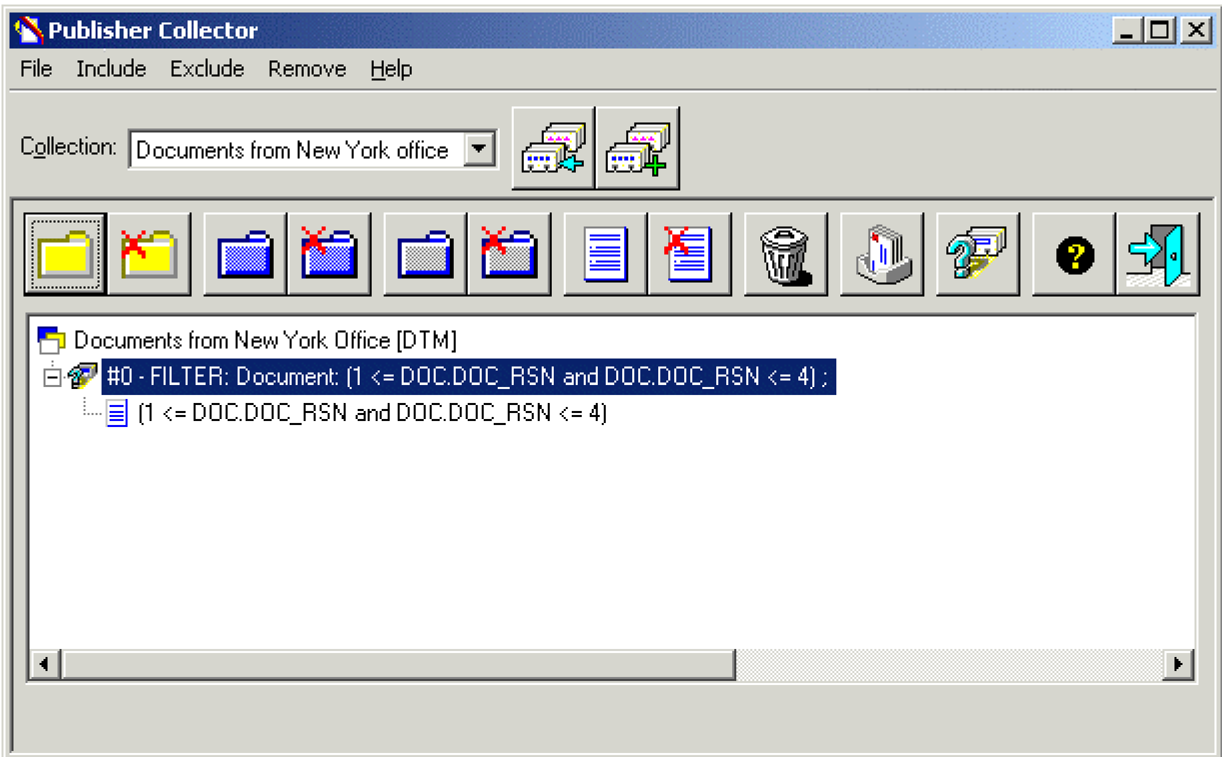


Figure 99: Query-based collection

For information on creating a query-based collection, see Using a Query to Select Collection Contents.

Mixed Collection Example

In the following example of a mixed collection, the user combines the query method and the manual selection method.

The user performs a query, specifies the query as the collection filter, and adjusts the results using the manual selection method. When the collection is used, Exigen Workflow applies the settings in the following order:

1. It performs the query.
2. It includes and excludes folders.
3. It includes and excludes subfolders.

4. It includes and excludes documents.

For example, if a user specifies a query and excludes folders, the query is executed and the folders are excluded from the query results as shown in the following example:

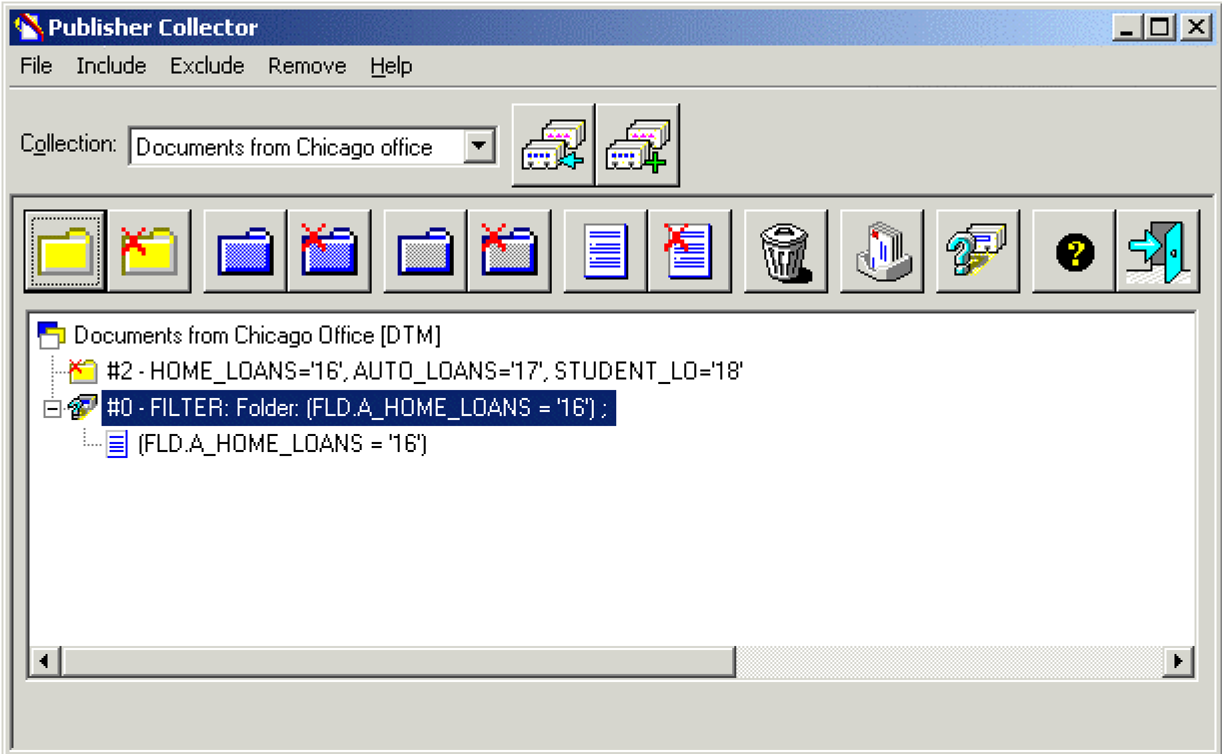


Figure 100: Combining manual and query selection

For information on creating a mixed collection, see Combining Both Methods to Specify a Collection.

Specifying Collection Contents

To add, remove, or modify documents of a collection, in the **Publisher Collector** window, in the **Collection** list, select a collection name and ID box.

The collection name and ID in square brackets appear in the table.

The following topics are described in this section:

- Manually Selecting Collection Contents
- Using a Query to Select Collection Contents
- Combining Both Methods to Specify a Collection
- Excluding and Removing Contents from a Collection
- Exiting the Publisher Collector Window

Manually Selecting Collection Contents

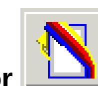
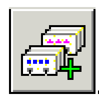
When you start Exigen Publisher Collector, the **Retrieve Results** window remains open in the background. Folders, subfolders, and documents to be included in the collection are selected in the **Retrieve Results** window.

To select items for the collection, use any of the following methods:

- To select a folder, subfolder, or document, click the item.
- To select all folders, subfolders, and documents, in the **Retrieve Results** window, hold down the **SHIFT** key and click the first and last items.
- To select individual items, hold down the **CTRL** key and click the items.

Using a Query to Select Collection Contents

To use a query to select collection contents, proceed as follows:

1. In the **Retrieve** window, perform a query as described in Retrieving Documents.
2. In the **Retrieve Results** window, click **Publisher Collector** .
3. To create a new collection, click **New collection** .

   The **New Collection** window appears.
4. Define the new collection as described in New Collection Window.
5. To change the contents of an existing collection, select a collection in the **Collection** list box.
6. To set the filter, click **Add search filter** .

   The filter used in the previous query is displayed in the **Publisher Collector** window. This filter is set as the filter for the current collection and can be used at any time to create a collection.

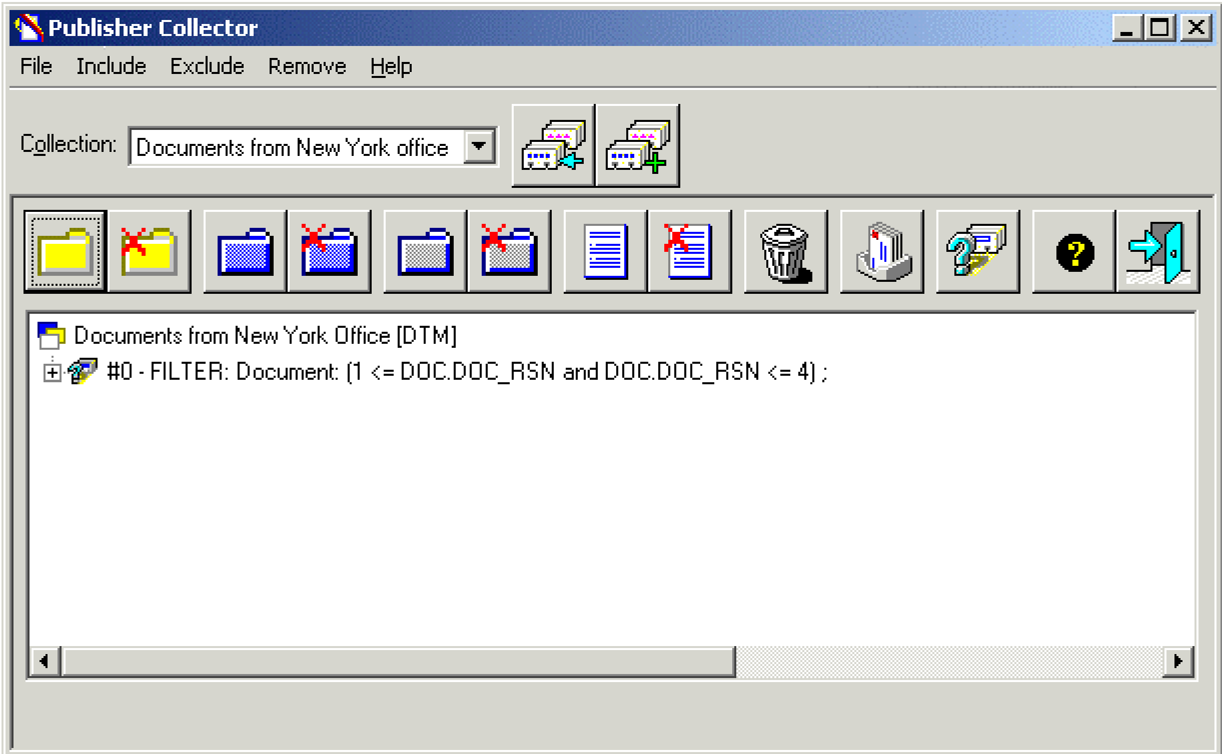
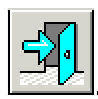


Figure 101: Setting a collection filter

7. To close the **Publisher Collector** window, click **Exit** .

Combining Both Methods to Specify a Collection

The manual selection and query methods can be combined to specify a collection. For information on manually selecting a collection, see Manually Selecting Collection Contents. For information on using a query to select a collection, see Using a Query to Select Collection Contents.

When creating the collection, Exigen Workflow applies the settings in a predefined order as described in Mixed Collection Example.

Excluding and Removing Contents from a Collection

Excluding is not the same as removing. You can exclude only those items that are the original contents of a folder or subfolder.

For example, click the **Exclude** buttons only if you included a folder in a collection, but want to exclude specific documents of that folder from the collection.

Remove is used to delete a document from a collection folder that initially did not contain this document but was still included.

To exclude or remove contents from a collection, in the **Publisher Collector** window, in the tree structure, select the folders, subfolders, and documents to be excluded or removed from a collection and click **Exclude** or **Remove.** For more information on **Exclude** and **Remove,** see Publisher Collector Window Buttons.

Exiting the Publisher Collector Window

When the collections are complete, close the **Publisher Collector** window by clicking **Exit** or pressing **ALT+F4.** The changes are automatically updated during the modification process.

Further collection maintenance requires packaging as described in the *Exigen Workflow Administrator's Guide, Part 3: Utilities,* Chapter 11: Publisher Packager Utility.

Chapter 11: Image Viewer

This section describes the features of the Image Viewer.

The following topics are described in this section:

- Overview
- Image Viewer Window

Overview

The Image Viewer displays and modifies document images.

Open the Image Viewer by using either the **Left Image Display** or **Right Image Display** buttons, located in all the queue windows.

Note: Right Image Viewer has more options, such as access to Print Server and Stamp Management Utility. If available, the **Modify Image** button also can be clicked to open Image Viewer.

Double-clicking on an individual document record can also open the Image Viewer.

Image Viewer Window

When the Image Viewer is opened, the following menus and toolbars are displayed at the top of the **Image Viewer** window. For more information on the menus and toolbars, see Appendix A: Exigen Workflow Menus and Buttons.

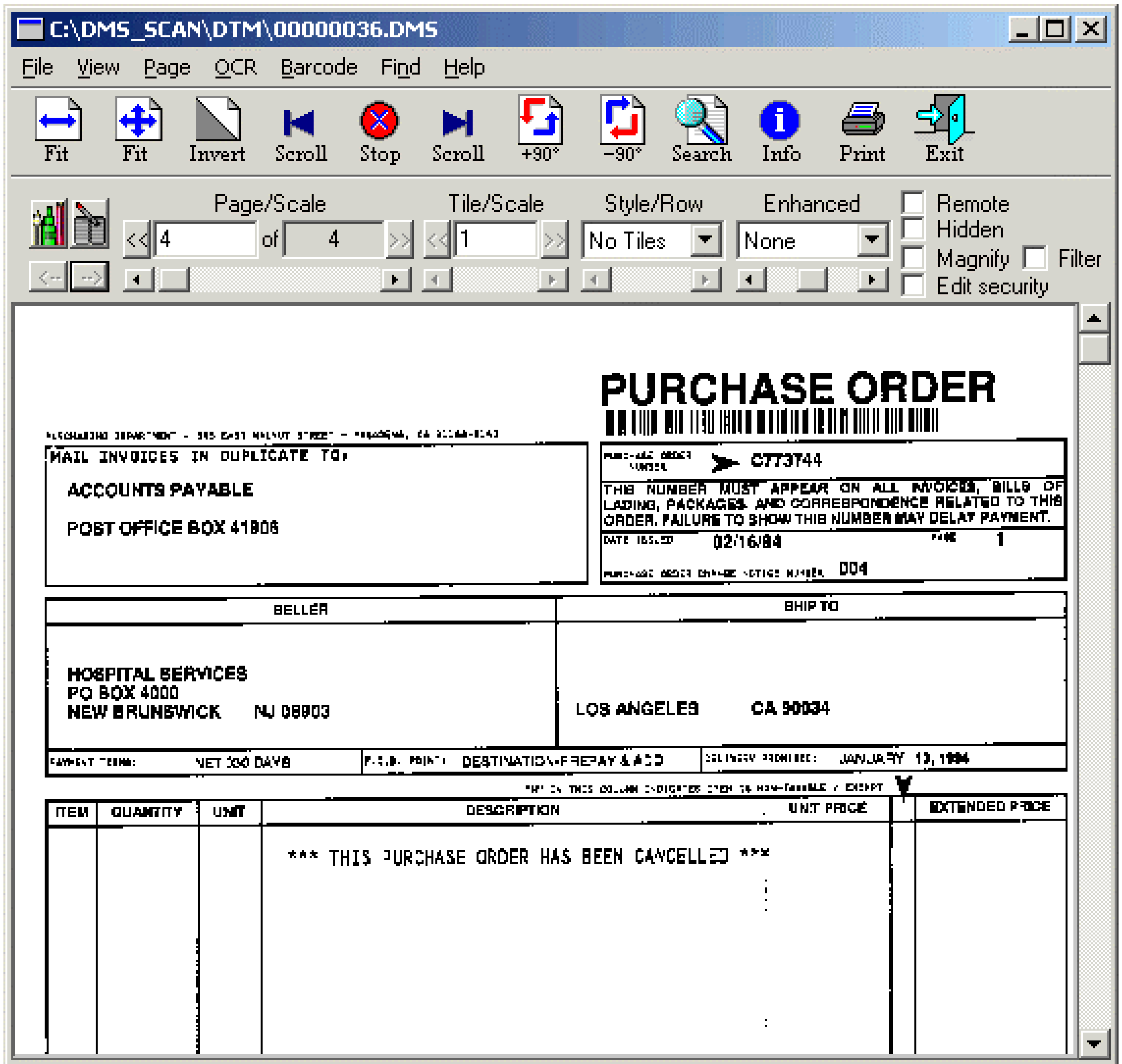


Figure 102: Image Viewer window

Note: Some buttons may be configured to be hidden in the Image Viewer. For information on configuring Image Viewer display settings, see Defining Image Viewer Properties.

The following topics are described in this section:

- Displaying Documents
- Magnifying Portions of a Page
- Scanning Using OCR
- Viewing Barcode Values
- Selecting a Barcode Engine
- Applying Stamps to a Document
- Printing and Faxing Images
- Defining Image Viewer Properties

- Using Document Notes
- Using Page Notes
- Annotating Document Images
- Viewing Document Information

Displaying Documents

The Image Viewer has the following tools for viewing documents and related information:

Image Viewer tools	
Tool	**Description**
Best Fit	Resizes the image to fit in the viewer window.
Fit in Window	Resizes the image to fit its full width in the viewer window.
Rotate	Rotates the image. The following options are available: • **+90** or **Right** • **-90** or **Left**
Invert	Changes the display of the image from black-on-white to white-on-black and vice versa. Inverting the image can make it easier to read.
Contrast	Applies more or less contrast to an image for enhancement purposes. The following options are available: • **More** • **Less**
Scale	Reduces or enlarges image size. The following options are available: • **25%** • **50%** • **75%** • **100%** • **125%** • **150%** • **175%** • **200%**
Toolbar Hide/Show	Displays or hides the Image Viewer toolbar. This enlarges or reduces the image viewing area.
Page/Scale	Displays the current page number and the total number of pages in the document. The left and right arrows are used to manually page through the document. The **Page** menu offers the following options: • **Next Page** • **Previous Page** • **First Page** • **Last Page**

Image Viewer tools	
Tool	**Description**
AutoDocument Scroll	Scrolls slowly through the document, forward or backward. The following options are available: • **(<)** backward • **(>)** forward • **(STOP)**
Image Info	Displays document information.
Display Settings	Opens a window to specify general display settings as described in Defining Image Viewer Properties.

Image Viewer tools are activated by selecting menu commands and clicking buttons as described in Appendix A: Exigen Workflow Menus and Buttons, Image Viewer.

Alternatively, some Image Viewer tools are activated by right-clicking in the Image Viewer window and selecting a command from the pop-up menu. The following pop-up menu commands are available:

- **Best Fit**
- **Fit In Window**
- **Scale**
- **Rotate**
- **Contrast**
- **Invert**
- **Image Info**

Creating Thumbnail Views of Each Page Scanned Using Create Tiles

If documents are scanned using the Create Tiles feature, to create thumbnail views of each page, proceed as follows:

1. To specify where the tiles appear in the window, in the **Style/Row** list box, select **Left Side** or **Bottom.**
2. To display the entire page, click on a tile.

   The tile with the blue shadow on the right is the one currently displayed.
3. If there are many pages, use the Tile/Scale function to scroll through the document or go to a specific tile.
4. To change the order of tiles, use the drag-and-drop feature:
   - To add a selected tile to a set of tiles, press **CTRL** and use the left mouse button.
   - To add all tiles between two selected tiles, press **SHIFT** and use the left mouse button.

The following table describes actions associated with control keys in Image Viewer:

<table>
<tr><th colspan="2">Control Keys table</th></tr>
<tr><th>Control keys</th><th>Action</th></tr>
<tr><td>Left mouse button</td><td>Navigates in the visible tiles set. The current page is highlighted in blue.</td></tr>
<tr><td>Left mouse button + CTRL</td><td>Selects multiple pages. The pages from different tile sets can be selected. The sequence of pages in the selection does not depend on the order in which they were selected. The selected pages are highlighted by blue when visible.

This combination is used to add the current image to a set of tiles to be moved.</td></tr>
<tr><td>Left mouse button + SHIFT</td><td>Selects a range of multiple pages. The range covers all pages between minimum selected and maximum selected. Pages from different tile sets can be selected. The sequence of pages in the selection does not depend on the order in which they were selected. The selected pages are highlighted by blue when visible.

This combination is used to select all the tiles between the two selected tiles.</td></tr>
<tr><td>Right mouse button</td><td>Accesses the pop-up menu. The pop-up menu allows you to perform the following operations:
<table>
<tr><th>Menu command or key combination</th><th>Description</th></tr>
<tr><td>Copy To Buffer or CTRL+INS</td><td>Copies the selection to the buffer.</td></tr>
<tr><td>Paste After</td><td>Appends the selection in the buffer after the current page.</td></tr>
<tr><td>Paste Before or SHIFT+INS</td><td>Inserts the selection in the buffer before the current page.</td></tr>
<tr><td>Drop Buffer</td><td>Empties the buffer contents.</td></tr>
</table></td></tr>
<tr><td>Drag-and-drop
within the visible tiles set</td><td>Selects and relocates a tiles set.</td></tr>
</table>

Magnifying Portions of a Page

Parts of a page can be magnified to make reading easier. The Image Viewer has two methods for magnification: using the mouse button or using the **Magnify** check box.

To magnify a page using the mouse, click and hold the right mouse button while moving the cursor around the area you want to magnify. Once magnified, you can click and hold the left mouse button to move the document up and down or right and left.

To magnify a page using the **Magnify** check box, select the **Magnify** check box. Once checked, a box appears in the middle of the Image Viewer that magnifies the area inside the box. The box can be reshaped by dragging the sides of its frame. You can also move the **Magnify** box by clicking inside the box and dragging it. The bold box inside, shown while dragging, specifies the area that is magnified.

To magnify any part of the zoom window to any scale of magnification, move the small viewing area rectangle in the zoom window to the desired area by holding down both mouse buttons simultaneously.

Scanning Using OCR

The optical character recognition (OCR) option scans a page or document for recognizable words and characters and saves them in a text file.

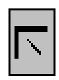
To use the OCR option on a page or document, select **OCR > OCR Page** or **OCR Document.**

To use the OCR option on part of document, proceed as follows:

1. Select **OCR > OCR Zone.**

Note: The **OCR Zone** option does not save any recognized data in a text file.

The cursor turns into an arrow.



2. To select the scan area, position the arrow at the top left of the area to be scanned.
3. Click and drag the cursor to the bottom-right point of the area.

   A box appears while you are dragging.
4. To start the recognition process, release the mouse.
5. When an OCR file is created, select **Find > Search Text.**
6. Enter the word or words to search for.
7. To specify a case-sensitive search or find words that sound like the ones entered, select the appropriate options.
8. Click **Find.**

   The **Search Results** window displays the page numbers where the words appear in the document.
9. To display a page in the Image Viewer, double-click on the page number.

   The found words are displayed in red.
10. To display the results of the previous search, select **Find > Show Results.**

Note: You can use the OCR function in Image Viewer to extract indexing information from the actual image. For information on extracting indexing information from the image, see Assigning a Parcel to a New Folder in Chapter 4: High Volume Indexing and the *Exigen Workflow Administrator's Guide*, *Part 2: Business Component Reference,* Chapter 5: Form OCR Server.

Viewing Barcode Values

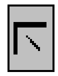
To view barcode values, proceed as follows:

1. To view any barcode values associated with an image, select **Barcode > Document Info.**

   A list box shows all barcode values for that document.

2. To translate a barcode that exists on an actual image, select **Barcode > Read Barcode.**

   The cursor turns into an arrow.



3. Position the arrow at the top-left corner of the barcode.
4. Click and drag the cursor until the box surrounds the barcode, and release.

   The **Info** window shows the value of the selected barcode. By viewing barcode values, you can ensure that the barcode configurations are working properly and that the system is recognizing the barcodes.

Note: You can extract indexing information from a bar code and convert the bar code to alpha and numeric characters using the Read Bar Code function as described in Assigning a Parcel to a New Folder in Chapter 4: High Volume Indexing and the *Exigen Workflow Administrator's Guide*, *Part 2: Business Component Reference,* Chapter 5: Form OCR Server.

Selecting a Barcode Engine

To select a barcode engine, proceed as follows:

1. Select **Barcode > Select Engine.**

   The **Barcode Engine** dialog appears.

2. In the **Engine** field, select a barcode engine.
3. In the **Format** field, select a barcode format.
4. To revert to the default settings, click **Default.**
5. To close the dialog without saving the settings, click **Cancel.**
6. To save the settings and close the dialog, click **OK.**

   The settings are enabled only for the current Image Viewer work session.

7. To apply the settings to future Image Viewer work sessions, select **File > Save Config** or press **CTRL+C.**

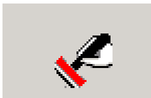
By default, the first available barcode engine is selected. If this engine supports CODE 39 format, CODE 39 format is selected. The left and right Image Viewers can have different default barcode engines.

Applying Stamps to a Document

Rubber stamps can be applied to Exigen Workflow documents. If your user profile includes the right to use rubber stamps, the **Stamp** menu option is enabled.

To apply a stamp to a document, proceed as follows:

1. To view the assigned stamps window, select **Stamp.**
2. Select the stamp you want to apply and click **Attach.**

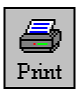


The rubber stamp appears in the upper left corner of the document in the Image Viewer. You can drag the rubber stamp to another location within the document by pressing the left mouse button and moving the stamp.

Printing and Faxing Images

To print or fax an image, proceed as follows:

1. Select **Print.**



The **Print/Fax** window appears.

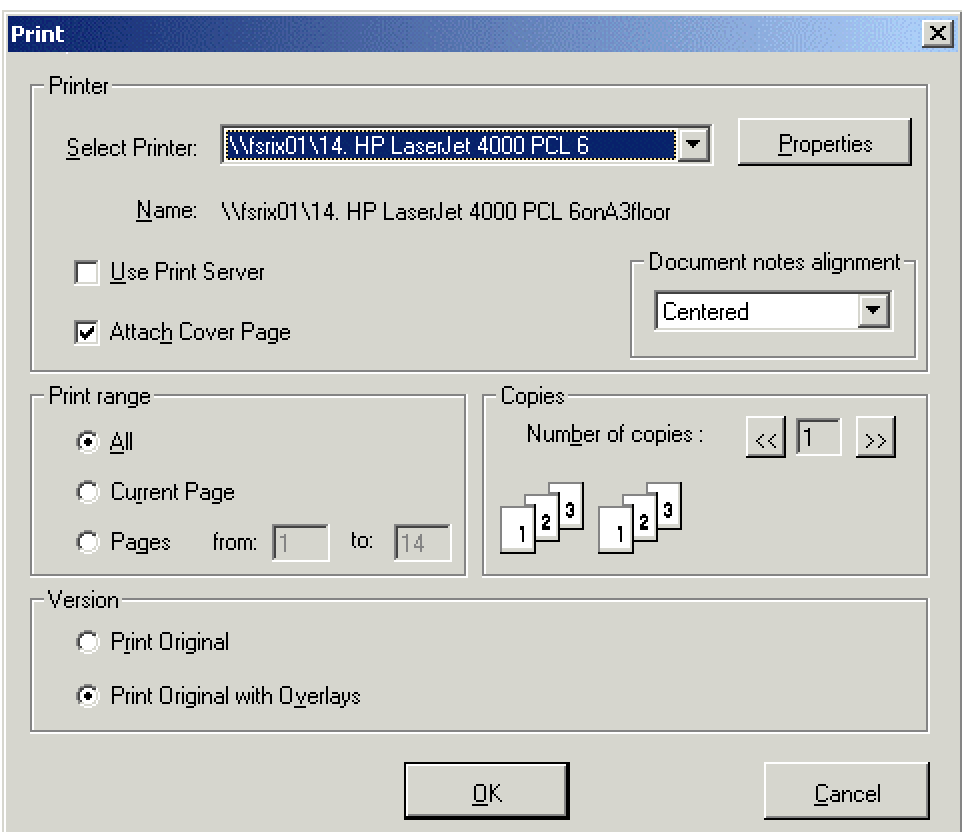


Figure 103: Print/Fax window

2. To select a fax or a printer, select an item in the **Select Printer** list.
3. To change fax or printer properties, click **Properties.**
4. To print a cover page, select the **Attach Cover Page** option.

   The cover page, generated by Exigen Workflow, displays general information on the printed document, such as the project ID, document number, number of pages, indexing information, and document notes.

5. To align the text of document notes, select one of the following options in the **Document notes alignment** field:
   - **Left**
   - **Centered**
   - **Right**

Note: The **Document notes alignment** field is enabled only if the **Attach Cover Page** option is selected.

6. In the **Print Range** section, select a print range.
7. To specify the number of copies, in the **Number of Copies** field, enter a number.
8. To print or fax an image without annotations, in the **Version** section, select the **Print original** option.
9. To print or fax an image with annotations, in the **Version** section, select the **Print original with overlays** option.
10. To begin printing or faxing, click **OK.**
11. If you are using a print server to process print or fax jobs, select the **Use Print Server** option.

    The window options change.

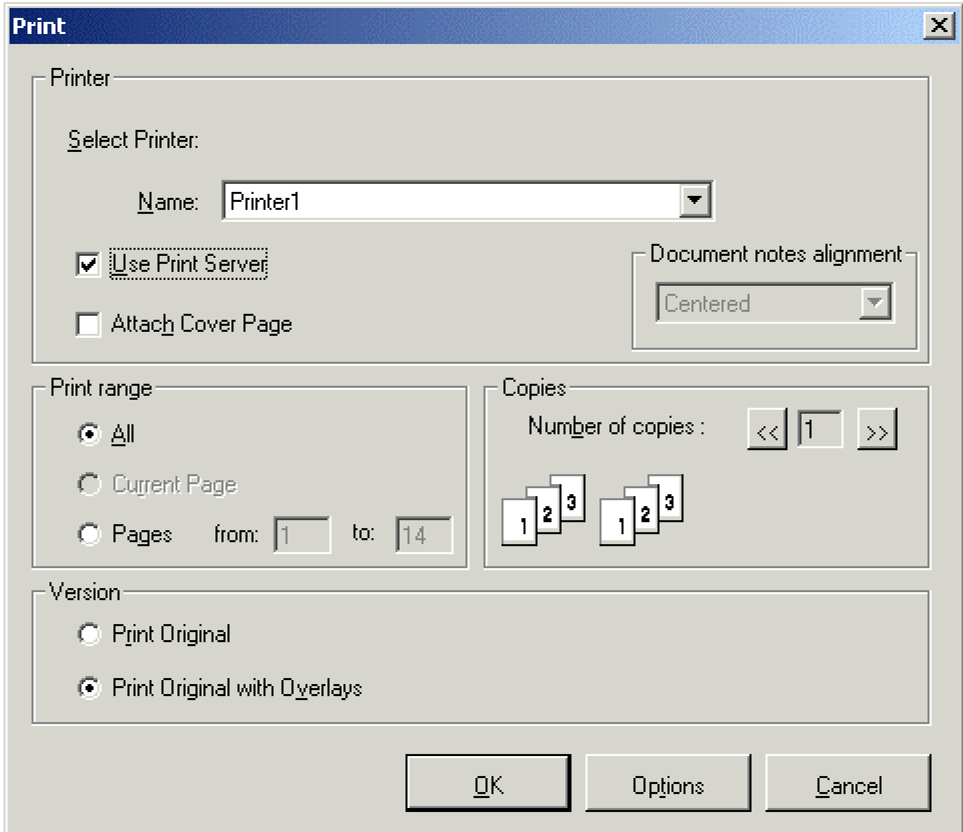


Figure 104: Print/Fax window with Use Print Server

12. To select a printer or fax, select an item in the **Name** list.

    The **Options** button allows you to change print or fax options. When selected, the **Print/Fax Server Options** window appears.

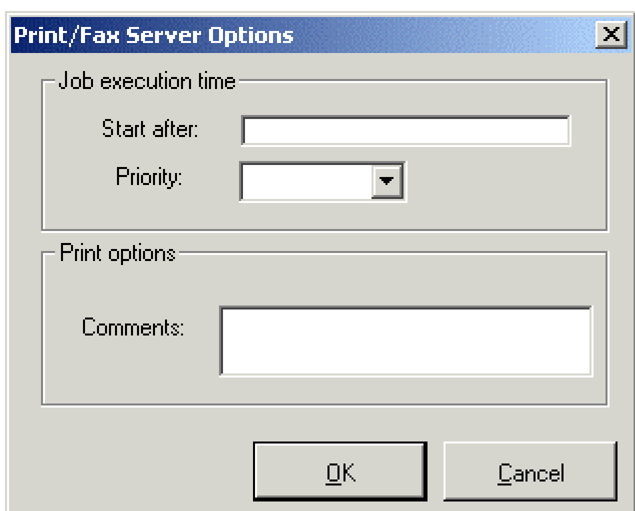


Figure 105: Print/Fax Server Options window

13. To schedule the job to print or fax within a specified period, in the **Job Execution Time** section, in the **Start after** field, enter the date and time.
14. To specify the priority, in the **Priority** list, select **Low, Normal,** or **High.**
15. In the **Comments** field, enter optional comments.
16. To save the options, click **OK.**

Defining Image Viewer Properties

To define Image Viewer properties, proceed as follows:

1. To open the **Display Settings** dialog, select **View > Display Settings.**

   The **Display Settings** dialog appears.

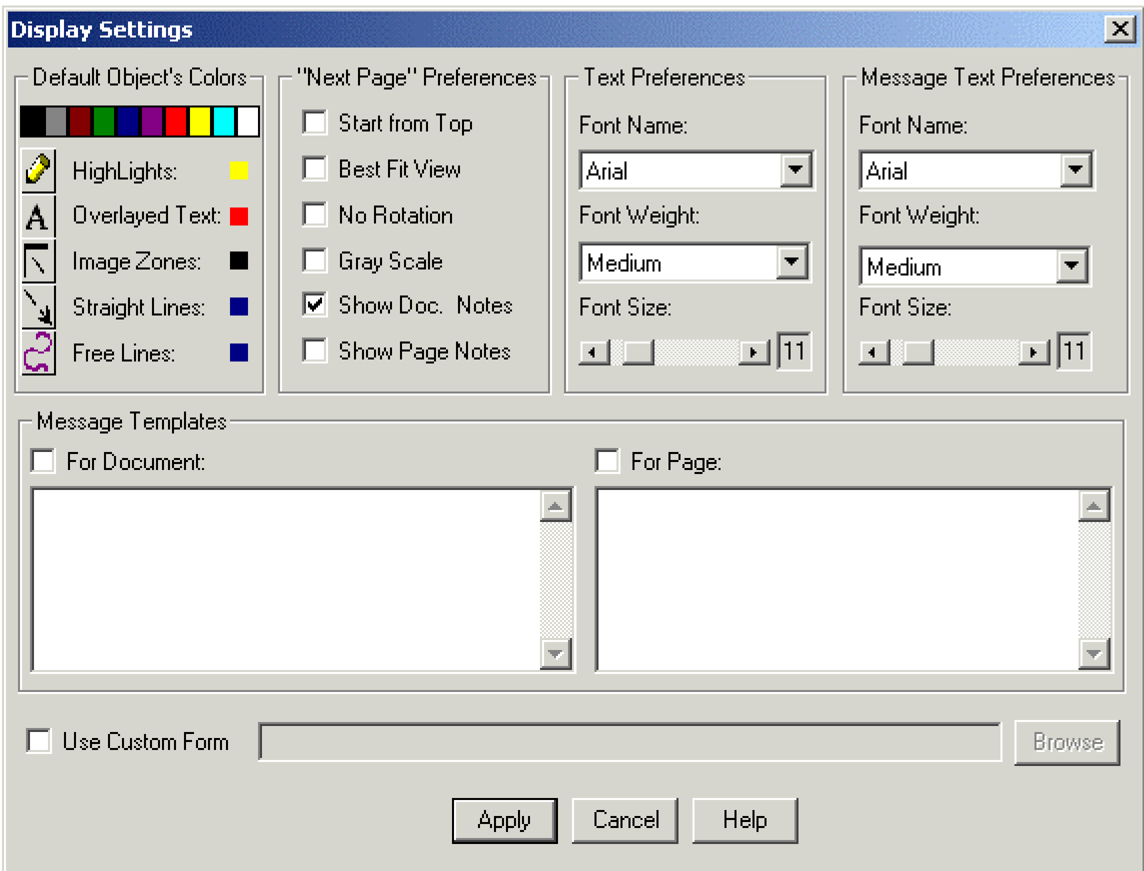


Figure 106: Display Settings window

2. In the **Default Object Colors** section, select the default colors for **Edit Tools.**
3. In the **"Next Page" Preferences** box, to set preferences for every page that is opened subsequently, configure the display settings as described in the following table:

“Next Page” Preferences box options	
Option	**Description**
Start from Top	Displays all opened pages from the top.
Best Fit View	Scales opened pages to fit in the window width.
No Rotation	Ignores rotation in opened pages.
Gray Scale	Enables gray image filtering
Show Doc. Notes	Enables the document notes button  in DMS Viewer. For information on document notes, see Using Document Notes.
Show Page Notes	Enables two additional buttons for managing page notes in DMS Viewer. For information on page notes, see Using Page Notes.

4. In the **Text Preferences** box, configure the default appearance of the text annotations.
5. In the **Message Text Preferences** box, configure the default appearance of document, page, and posted notes.
6. To display a template text in the **Document Notes** window when a user creates a new document note, in the **Message Templates** box, perform the following steps:
   - Select the **For Document** check box.
   - In the lower field, enter the proposed text.
7. To display a template text in the **Page Notes** window when a user creates a new page note, in the **Message Templates** box, perform the following steps:
   - Select the **For Page** check box.
   - In the lower field, enter the proposed text.
8. To maintain document and page notes with an external executable application, perform the following steps:
   - Select the **Use Custom Form** check box.
   - Browse for the location of the external application.

   The page and document notes are opened and modified in the selected application.
9. To save the changes made in the **Display Settings** window, click **Apply.**
10. To close the **Display Settings** window without applying changes, click **Cancel.**

Using Document Notes

A document note is an electronic text attached to the document.

To use document notes, perform the following steps:

1. In the **Display Settings** window, select the **Show Doc. Notes** check box.
2. In the main Image Viewer window, click the document notes button .

   The **Document Notes** window appears.

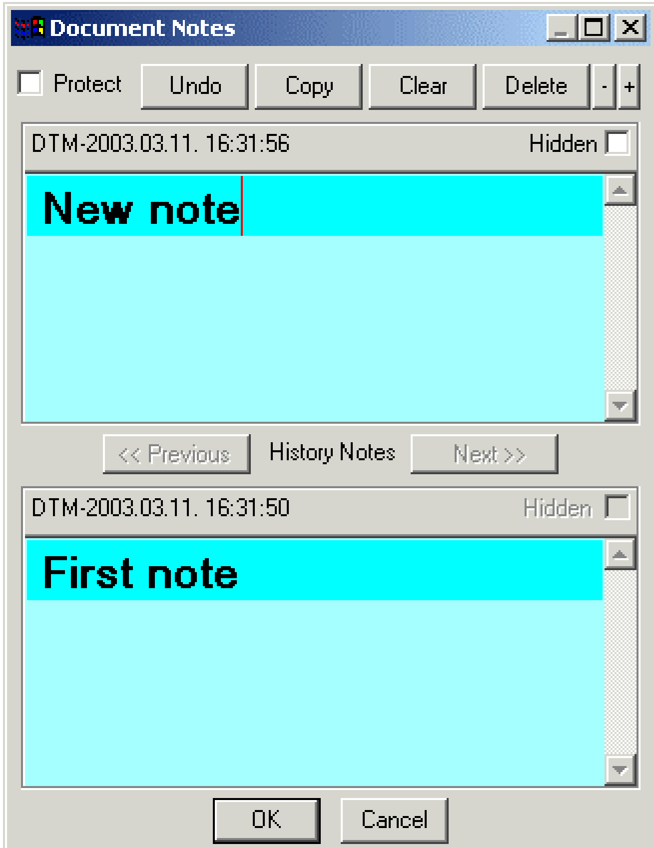


Figure 107: Document Notes window

The upper field is the area where you write the new document note text. The lower field displays the existing document notes.

3. In the upper field, enter in the document note text.
4. In the **Document Notes** window, perform appropriate tasks as described in the following table:

Document Notes window buttons	
Button	**Description**
Undo	Undoes the changes made in the upper field.
Copy	Copies the text from the lower field.
Clear	Clears the upper field.
Delete	Deletes document notes. **Delete** is not available when creating the first document note. **Delete** can also be disabled by administrators.
-	Decreases the text font size.
+	Increases the text font size.
Previous	Scrolls backward through document notes in the lower field.
Next	Scrolls forward through document notes in the lower field.

5. To enable the **Hidden** check box in the **Document Notes** window, in the main Image Viewer window, select the **Hidden** check box.
6. To hide document notes for this document, in the upper right corner of the **Document Notes** window, select the **Hidden** check box.
7. To view and modify hidden annotations, in the main Image Viewer window, select the **Hidden** check box.

   Users must have rights to view and modify hidden annotations.
8. To save the new document note, click **OK.**
9. To close the **Document Notes** window without applying changes, click **Cancel.**

Using Page Notes

A page note is an electronic text attached to a document's page.

To manage page notes, perform the following steps:

1. In the **Display Settings** window, select the **Show Page Notes** check box.

   Two additional buttons appear in the toolbar of Image Viewer next to the **Remote** and **Hidden** check boxes.
2. To manage page notes, perform appropriate tasks as described in the following table:

Page notes buttons	
Button	**Description**
	Creates a new page note for the current page.
	Opens the next page containing page notes.

3. To attach a new page note to the current page, click the new page note button.

   The **Page Notes** window appears.

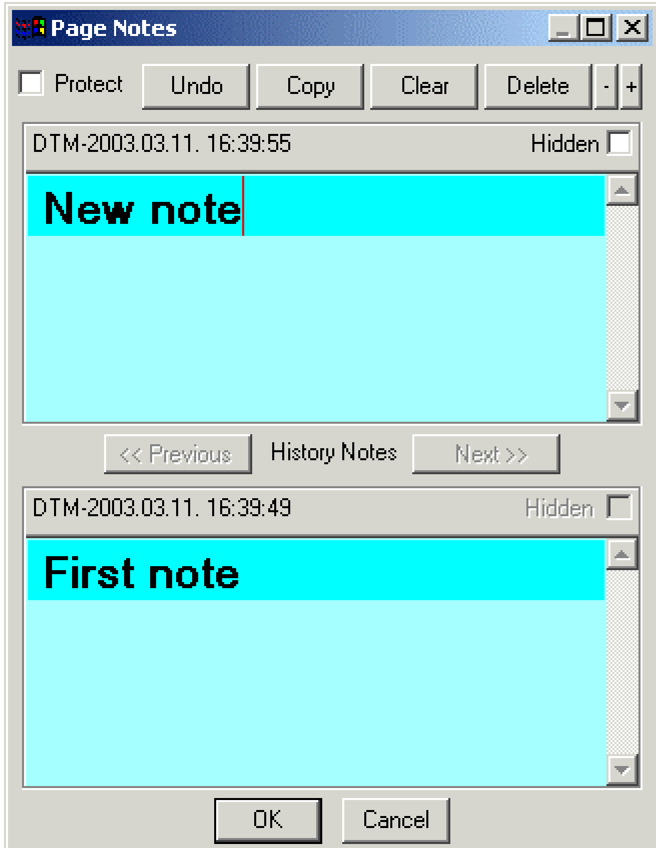


Figure 108: Page Notes window

The upper field is the area where you enter the new page note text. The lower field displays existing page notes.

4. In the upper field, enter the page note text.
5. Perform appropriate tasks in the **Page Notes** window as described in the following table:

Page Notes window buttons	
Button	**Description**
Undo	Undoes the changes made in the upper field.
Copy	Copies the text from the lower field.
Clear	Clears the upper field.
Delete	Deletes notes in the current page. This button is not available when creating the first note on the current page. The button can be disabled by administrators.
-	Increases the text font size.
+	Decreases the text font size.
Previous	Scrolls backward through page notes in the lower field.
Next	Scrolls forward through page notes in the lower field.

6. To enable the **Hidden** check box in the **Page Notes** window, in the main Image Viewer window, select the **Hidden** check box.
7. To hide page notes for this page, in the upper right corner of the **Page Notes** window, select the **Hidden** check box.
8. To view and modify hidden annotations, in the main Image Viewer window, select the **Hidden** check box.

   Users must have rights to view and modify hidden annotations.
9. To save the new page note, click **OK.**

To close the **Page Notes** window without applying changes, click **Cancel.**

Annotating Document Images

The Edit Tools option is used to annotate document images. Although these annotations are permanent, document images can be viewed and printed with or without them.

The following topics are described in this section:

- Opening Edit Tools
- Setting Annotation Security
- Creating a Hidden Annotation
- Edit Tools
- Objects Check Boxes
- Edit Tools Window Buttons
- Selecting Image Filtering Settings

Opening Edit Tools

To open the **Edit Tools** window, in the Image Viewer, click the **Edit Tools** button.

The **Edit Tools** window appears.

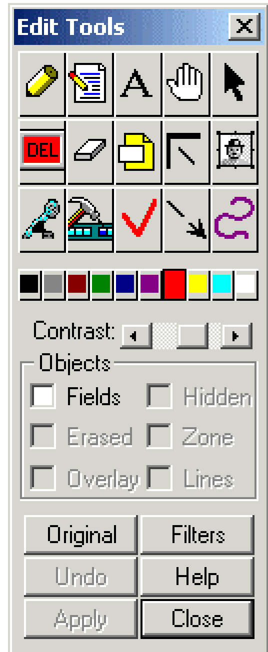


Figure 109: Edit Tools window

Setting Annotation Security

Annotation security restricts user access to secured annotations. The system administrator defines document context security levels and assigns them to global groups so that users in these groups can perform only those actions with secured annotations that are specified in the assigned document context security levels.

Users can assign a security level to annotations only if they are assigned to a group that has the Create permission set in that security level. Assigning a different security level or setting an annotation as public or private requires Change Level permission in the security level that is currently assigned to the annotation. For example, if an annotation is assigned to security level A and the user wants to change it to security level B, the following security permissions are required for the user:

- Change Level permission in security level A
- Create permission in security level B

To create a secured annotation, proceed as follows:

1. Select the **Edit security** check box.

   If the **Edit security** check box is cleared, the new created annotations are public and can be viewed by all users.

2. Create an annotation.

   The **Security level assignment to object** window appears.

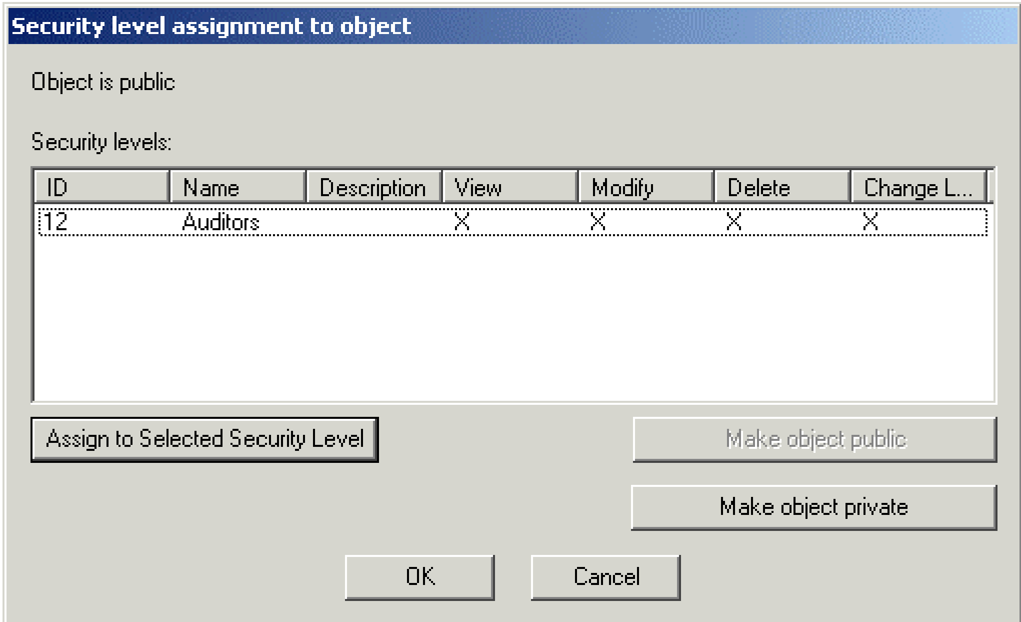


Figure 110: Setting a security level for object

The **Security level assignment to object** window contains the following columns:

Security level assignment to object window table columns	
Column	**Description**
ID	Security level identifier.
Name	Security level name.
Description	Security level description.
View	If marked with X, users with the corresponding security level are allowed to view the annotation.
Modify	If marked with X, users with the corresponding security level are allowed to modify the annotation.
Delete	If marked with X, users with the corresponding security level are allowed to delete the annotation.
Change Level	If marked with X, users with the corresponding security level are allowed to change the security level of the annotation.

The **Security levels** list contains all security levels for which the user has permissions defined for the given object type. If the user is an annotation auditor, the list contains all annotation security levels defined in the system.

3. Select the desired security level and click **Assign to Selected Security Level.**

   The message at the top of the window displays the annotation’s security level. If the annotation has no security level, the text states the following:

```
Object is public
```

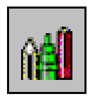
4. To remove the security level from the annotation and make it public, click **Make object public.**
5. To make the annotation private, click **Make object private.**

   Only the annotation author and annotation auditors can view and modify private annotations. Annotation auditors cannot make annotations created by other authors their private.

6. To apply the settings, click **OK.**
7. To close the window without applying changes, click **Cancel.**

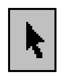
To modify annotation security settings, proceed as follows:

1. In the Image Viewer, ensure that the **Edit security** check box is selected.
2. Click **Edit Tools.**

   The **Edit Tools** window appears.

3. In the **Edit Tools** window, click the modification button.

4. In the document window, double-click an annotation.

   The **Security level assignment to object** window appears.

5. Make the required changes to the annotation security settings.

Note: You must have the corresponding rights to modify secured annotations.

6. To save changes, click **OK.**

Creating a Hidden Annotation

To create a hidden annotation, proceed as follows:

1. In the main **Image Viewer** window, select the **Hidden** check box.
2. Create an annotation as described in Edit Tools.
3. While creating the annotation, select **Hidden** in the annotation window.

   Not all annotations have the **Hidden** option.

Users can view and modify hidden annotations only if an administrator granted them access rights. If the user does not have the corresponding rights, this check box is disabled.

Edit Tools

Highlighting an Area

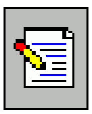
The Highlight Tool allows you to highlight part of a page.

To highlight an area, proceed as follows:

1. In the color bar, select a color.
2. Click the Highlight Tool.
3. Position the cursor in the upper left corner of the area to highlight.
4. Click and drag the mouse.

   A black box appears in the window.

5. When the area to be highlighted is surrounded, release the mouse button.



Placing Electronic Notes on a Page

The Note Tool places an electronic note on a page.

If the posted note is to be hidden, in the **Image Viewer** window, select the **Hidden** check box before configuring the note. This action enables the **Hidden** check box in the **Posted Notes** window.

To add a new note to a document page, proceed as follows:

1. In the **Edit Tools** window, select the Note Tool.
2. Position the cursor on the page where you want to place a note.
3. To open the **Posted Notes** window, double-click.

   The **Posted Notes** window appears.

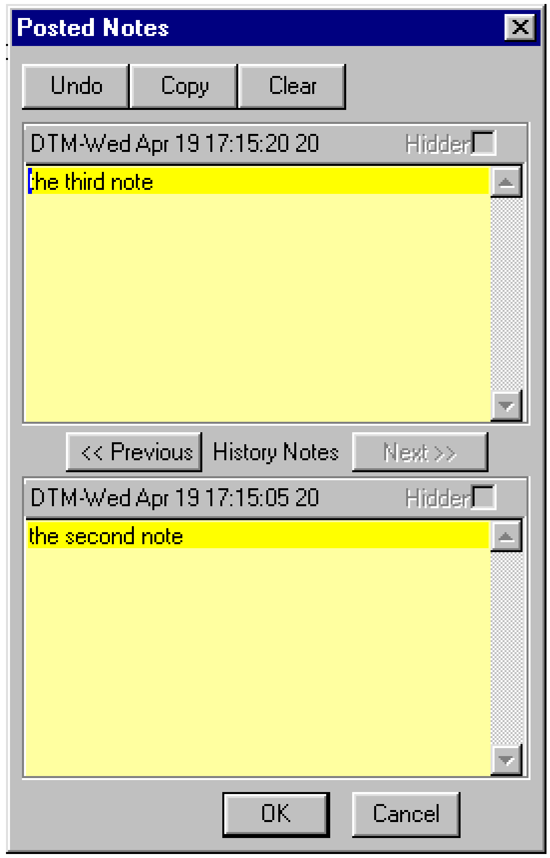


Figure 111: Posted Notes window

The **Posted Notes** window appears.

4. In the **Posted Notes** window, in the upper field, enter the note’s text.

   Note text also can be edited in this field.

5. To scroll through note history, click **<<Previous** and **Next>>.**

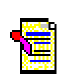
   Note history appears in the lower field.

6. To make posted notes hidden for this page, select the **Hidden** check box in the upper right corner of the **Posted Notes** window.

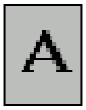
   Only users with rights to view hidden annotations can see and modify the hidden annotations by selecting the **Hidden** check box in the main **Image Viewer** window.

7. Click **OK.**

   The annotation icon is attached to the document page.



   The note becomes a permanent part of the document.



Adding Text to a Page

The Text Tool allows you to add text to a document page.

To add text to a document page using the Text Tool, proceed as follows:

1. In the **Edit Tools** window, select the Text Tool.
2. Position the cursor on the page where you want to add text.
3. To open the **Text Settings** window, double-click.
4. In the **Text Settings** window, specify the text properties by making the appropriate selections.

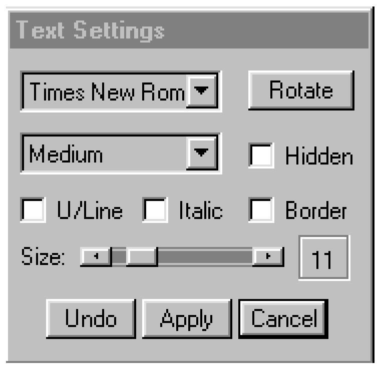


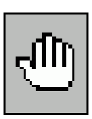
Figure 112: Text Settings window

Note: The default font is the one selected in the **Display Settings** window.

5. When the settings are specified, enter the text on the image.
6. To make the text hidden, select the **Hidden** check box in the **Text Settings** window.

   Only users with rights to view hidden annotations can see and modify the hidden annotations by selecting the **Hidden** check box in the main Image Viewer window.

7. When finished, click **Apply.**
8. To delete the text, click **Undo.**

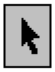


Moving Objects on a Page

The Move Tool moves overlaid objects from one place on a page to another.

To move objects using the Move Tool, proceed as follows:

1. In the **Edit Tools** window, click the Move Tool.
2. Position the cursor over the object you want to move.
3. Click and drag the object to the new location and release the mouse button.

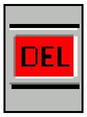


Modifying Overlaid Objects

The Modify Tool allows you to modify overlaid objects.

To modify overlaid objects using the Modify Tool, proceed as follows:

1. In the **Edit Tools** window, click the Modify Tool.
2. Position the cursor on the object you want to modify.
3. Double-click the object and proceed with the changes.



Deleting Overlaid Objects

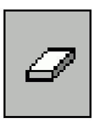
The Delete Tool deletes overlaid objects.

To delete overlaid objects using the Delete Tool, proceed as follows:

1. In the **Edit Tools** window, click the Delete Tool.
2. Position the cursor on the object you want to delete.
3. Double-click the object to delete it.

   The confirmation window appears.

4. To confirm the deletion, click **Yes.**
5. To cancel the deletion, click **No.**



Erasing Images

The Eraser Tool erases portions of the image.

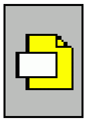
To erase part of the image using the Eraser Tool, proceed as follows:

1. In the **Edit Tools** window, click the Eraser Tool.
2. Position the cursor at the upper left corner of the image area you want to erase.
3. Click and drag the mouse.

   A black frame appears in the window.

4. When the area to be erased is completely covered by the black frame, release the mouse button.
5. At the prompt, click **Yes.**

   The portion of the image inside the frame disappears.



Hiding Portions of a Page

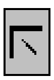
The Hide Text Tool hides portions of the page.

To hide portions of the page using the Hide Text Tool, proceed as follows:

1. In the **Edit Tools** window, click the Hide Text Tool.
2. Position the cursor at the upper left corner of the image area you want to hide.
3. Click and drag the mouse.

   A black frame appears in the window.
4. When the area to be hidden is completely enclosed by the black frame, release the mouse button.
5. At the prompt, click **Yes.**

   The portion of the image inside the frame is hidden.
6. To display the hidden text, select the **Hidden** check box in the Image Viewer toolbar.



Highlighting Text in a Zone

The Zone Tool highlights text in a specific zone or area of the page.

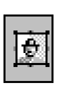
To highlight text using the Zone Tool, proceed as follows:

1. In the **Edit Tools** window, click the Zone Tool.
2. In the color bar, select a color.
3. Adjust the contrast of the highlighting by using the **Contrast** scroll bar. To make the color more intense, move the slider to the right.
4. Position the cursor at the top-left corner of the text area you want to highlight.
5. Click and drag the mouse.

   A black frame appears in the window.
6. When the text to be highlighted is completely covered by the frame, release the mouse button.

   The text inside the frame is highlighted with the color selected in the color bar.

By default, the color preset in the **Display Settings** window is used for highlighting.



Copying and Pasting from the Clipboard

The Clipboard Objects Tool copies to and pastes from the clipboard.

To copy and paste using the Clipboard Objects Tool, proceed as follows:

1. In the **Edit Tools** window, click the Clipboard Objects Tool.
2. Position the cursor at the upper left corner of the area that you want to copy or paste into.
3. Click and drag the mouse.

   A black frame appears in the window.

4. When the area to be copied or pasted is enclosed by the black frame, release the mouse button.
5. To open the **Clipboard Management** dialog, double-click inside the box.

   The **Clipboard Management** dialog appears.

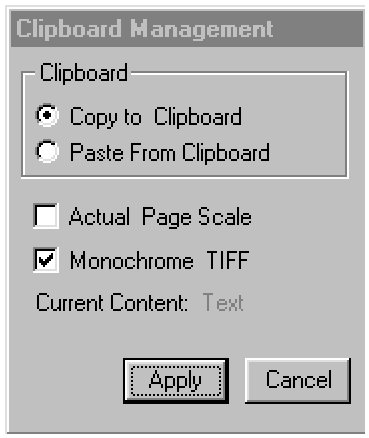
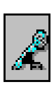


Figure 113: Clipboard Management window

6. To copy the material within the frame, select the **Copy to Clipboard** option.
7. To paste copied material from the clipboard to the image, select the **Paste to Clipboard** option.
8. To use actual page size, select the **Actual Page Scale** option.
9. To use a monochrome TIFF, select the **Monochrome TIFF** option.
10. To complete the operation, click **Apply.**



Adding Sound Messages

The Voice Message Objects Tool allows you to add sound recordings to the document image. To use this tool you must have a sound card and microphone installed.

To add sound recordings using the Voice Message Objects Tool, proceed as follows:

1. In the **Edit Tools** window, select the Voice Message Objects Tool.
2. Position the cursor where you would like to place the recording on the image.
3. To open the **Voice Message** window, double-click.

The **Voice Message** window appears.

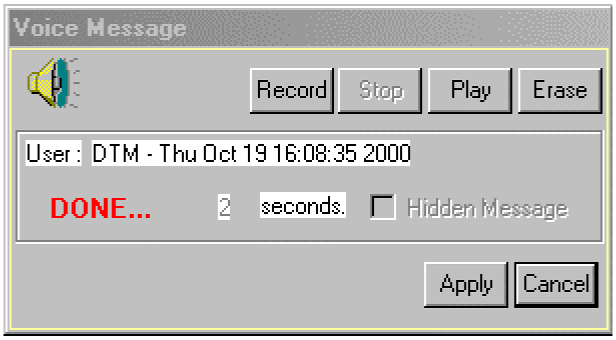


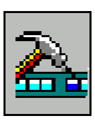
Figure 114: Voice Message window

4. If you want the message to be available only to authorized users, select the **Hidden Message** check box.

   Only the users that have rights to view hidden annotations can see and modify the hidden annotations by selecting the **Hidden** check box in the Image Viewer.

5. To record a new voice message, click **Record.**
6. When you finish, click **Stop.**
7. To replay your message, click **Play.**
8. To erase the message, click **Erase.**
9. To save the voice message, click **Apply.**

Warning: To use this feature, the `dtmvoice.wav` record template must be available in the `EWF\SYSTEM` directory. The extension of the file may differ. To create a record template, open the Windows Sound Recorder, create a new file, set the required options, and save it under the corresponding name.



Configuring and Executing Document Tasks

The Task Objects Tool configures and executes tasks associated with the document.

If the task is to be hidden, in the Image Viewer, select the **Hidden** option before configuring the task.

To execute tasks using the Task Objects Tool, proceed as follows:

1. In the **Edit Tools** window, click the Task Objects Tool.
2. Position the cursor on the image where you want to place the task.
3. To open the **Task Manager** window, double-click.

   The **Task Manager** window appears.

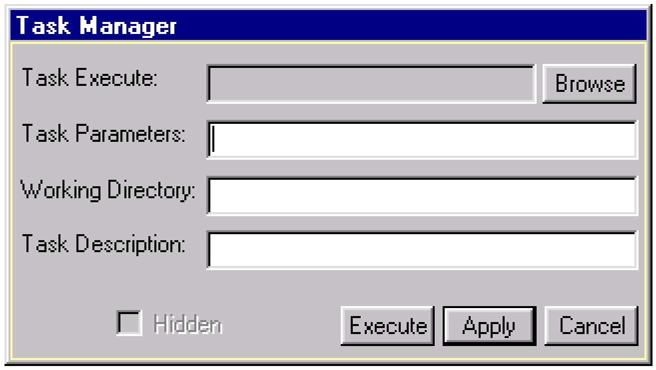
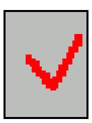


Figure 115: Task Manager dialog

4. To select the executable file for the task, click **Browse.**
5. In the **Task Parameters** box, enter any parameters needed to run with the task. Enter the path to the working directory and the task description.
6. To make the task hidden for this page, select the **Hidden** option.

   Only users having rights to view hidden annotations can see and modify the hidden annotations by selecting the **Hidden** check box in the Image Viewer.

7. To run the task, click **Execute.**
8. To save the task, click **Apply.**
9. To close the window without saving the task, click **Cancel.**



Setting References to Different Pages on an Image

The Hot Spot Tool sets references to different document pages on the image. Clicking a hot spot on one page takes you to another page assigned to the hot spot.

To reference a different document using the Hot Spot Tool, proceed as follows:

1. In the **Edit Tools** window, click the Hot Spot Tool.
2. Move the cursor to where you want to place the hot spot on the image.
3. To open the **Hot Spot** window, double-click.
4. The **Hot Spot** window appears.

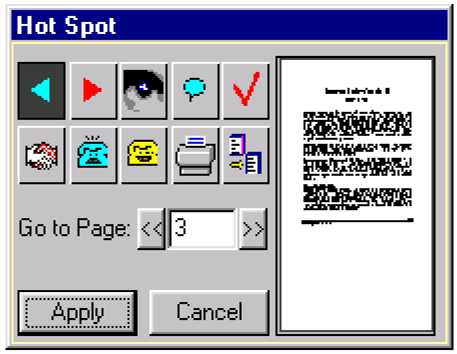
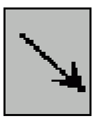


Figure 116: Hot Spot window

5. Select an icon you want to represent the hot spot on the image.
6. In the **Go To** section, select the page number you want to reference.
7. To assign the hot spot, click **Apply.**
8. To exit the window without assigning the hot spot, click **Cancel.**



Drawing Arrows

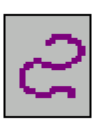
The Arrow Tool draws arrows on the image.

To draw arrows using the Arrow Tool, proceed as follows:

1. In the **Edit Tools** window, specify the arrow color in the color bar.
2. Click the Arrow Tool.
3. Position the cursor on the image where you want the arrow to start.
4. Click and drag the mouse to where you want the arrow to finish, and release the mouse button.

   The arrow appears.

By default, the color preset in the **Display Settings** window is used for arrows.



Drawing Free Hand Lines

The Free Hand Line Tool is used to draw freehand curved lines on the image.

To draw freehand lines using the Free Hand Line Tool, proceed as follows:

1. In the **Edit Tools** window, click the Free Hand Line Tool.
2. Select a color from the color bar.
3. Position the cursor at the place on the image where you want to start drawing.
4. Click the mouse button and start to draw your object.

5. When finished, release the mouse button.

   The free hand line appears.

By default, the color preset in the **Display Settings** window is used for free hand lines.

Objects Check Boxes

In the **Edit Tools** window, the check boxes beneath the **Contrast** bar are used for the following additional functions:

Objects check boxes	
Function	**Description**
Fields	Highlights text objects added to the document. The text objects appear in a solid red frame.
Erased	Highlights areas of the image that have been erased using the Eraser tool. The erased areas appear in purple.
Overlay	Highlights rubber stamps and other overlay objects of the image. The objects appear in a black frame with a gray background.
Hidden	Displays the hidden areas of the image that are hidden with the Hide Tool. The hidden areas appear in light blue.
Zone	Highlights objects processed by the Zone Tool. The zone objects appear in a broken red frame.
Lines	Highlight lines and arrows drawn on the image. The line and arrow objects appear in double red frames.

Edit Tools Window Buttons

In the **Edit Tools** window, the buttons in the lower section are used for the following functions:

Edit Tool buttons	
Button	**Description**
Original	Displays the image without overlaid objects.
Current	Displays the image with overlaid objects.
Apply	Completes the placement of the overlaid objects on an image.
Undo	Deletes any objects placed on the image subsequent to the last time **Apply** was selected,
Close	Closes the **Edit Tools** window.
Filters	Removes defects from a document. Defects are typically generated while scanning.
Help	Opens the Help window with information on Edit Tools.

Selecting Image Filtering Settings

The following topics are described in this section:

- Assigning Basic Filter Settings

- Assigning Advanced Filter Settings

Image filtering is available only if ScanFix Runtime is installed. For information on installing ScanFix Runtime, see the *Exigen Workflow Installation Guide,* Chapter 2: Installing Exigen Workflow, Third Party Software.

Assigning Basic Filter Settings

In the **Edit Tools** window, click **Filters.** The **Image Filtering Settings** window appears.

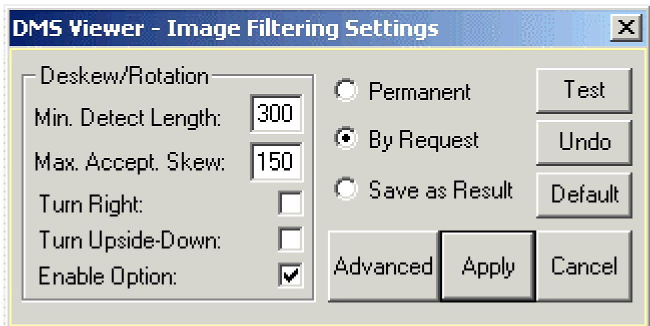


Figure 117: Image Filtering Settings window

The **Image Filtering Settings** window allows you to assign the following deskewing and rotation settings:

Image Filtering Settings window settings	
Setting	**Description**
Min. Detect Length	Minimum length of pixels to detect skewing. The default value is 300 pixels.
Max. Accept. Skew	Acceptable amount of skew on the minimum length. A setting of 100 denotes 1% skew, and 200 denotes 0.5%. A value of 150 is recommended as the default.
Turn Right	Rotates the image clockwise 90 degrees in the Image Viewer.
Turn Upside-Down	Rotates the image 180 degrees in the Image Viewer.
Enable Option	Enables the Deskew/Rotation settings.
Test	Tests the settings on the current document.
Undo	Removes test changes.
Default	Sets the options to default values.

Assigning Advanced Filter Settings

1. To assign additional filtering settings, click **Advanced.**

   The **Image Filtering Settings** window expands.

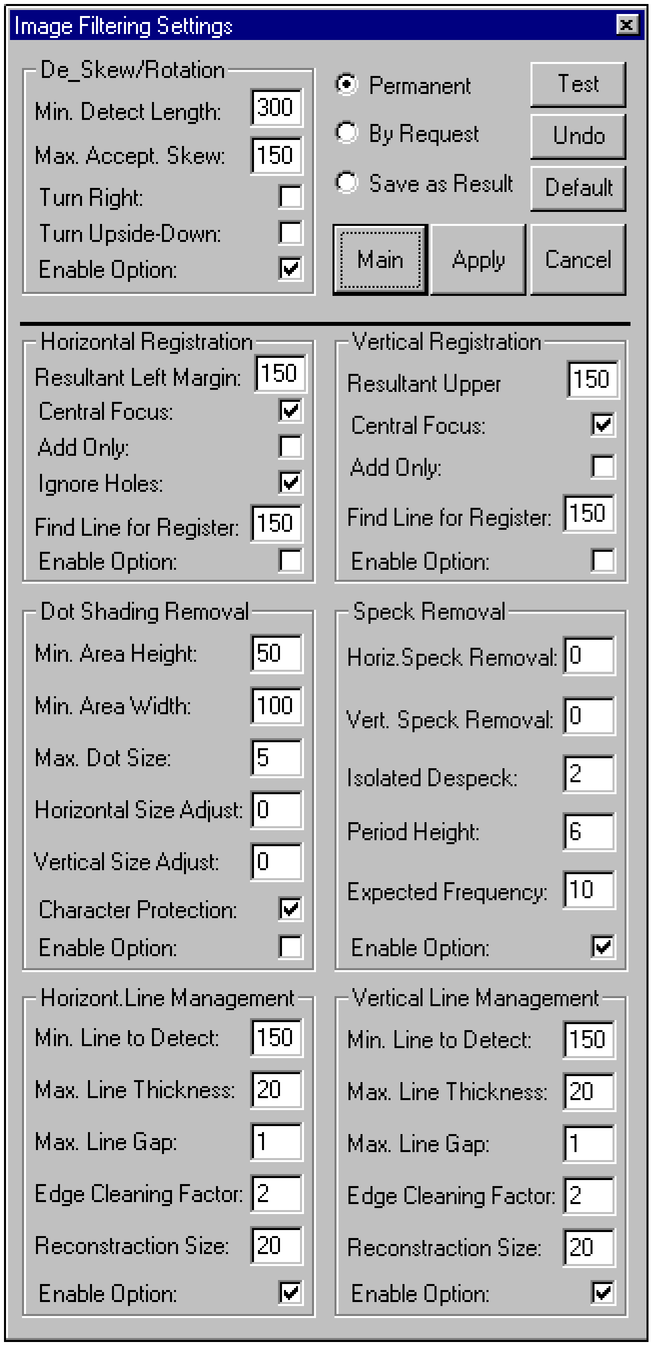


Figure 118: Advanced Image Filtering Settings

Each section in the lower two-thirds of the **Image Filtering Settings** window defines settings for one enhancement function.

2. To use the default settings, click **Default.**
3. To set a value, set the required value for each enhancement parameter.

Horizontal Registration settings position text horizontally on the page by providing a consistent left margin.

Horizontal Registration settings	
Setting	**Description**
Resultant Left Margin	Defines the number of pixels used for the left margin after processing.
Central Focus	Registers the image using only the middle portion of the image border. This feature must be used to ignore letterheads and logos.
Add Only	Expands the current margin of the image to the size specified in the **Resultant Left Margin** field. No portion of the image is cropped if the current margin is larger than the **Resultant Left Margin** field.
Ignore Holes	Ignores binder holes that may exist on the left side of the images.
Find Line for Register	Precisely registers forms. The value entered prompts the system to search horizontally for a vertical line segment larger than the value. The text is shifted so that the line is shifted to the left edge of the image, based on the value entered in the Resultant Left Margin field.
Enable Option	Enables the settings specified in the **Horizontal Registration** section.

Vertical Registration positions text vertically on the page by providing a consistent upper margin.

Vertical Registration settings	
Setting	**Description**
Resultant Upper Margin	Defines the number of pixels used for the upper margin after processing. The zero value places the text flush with the top of the image.
Central Focus	Registers the image using only the middle portion of the image border. This feature must be used to ignore letterheads and logos.
Add Only	Expands the current margin of the image to the size specified in the **Resultant Upper Margin** field. No portion of the image is cropped if the current margin is larger than the **Resultant Upper Margin** field.
Find Line for Register	Precisely registers forms. The value entered prompts the system to search vertically for a vertical line segment larger than the value. The text is shifted so that the line is shifted to the upper edge of the image, based on the value entered in the **Resultant Upper Margin** field.
Enable Option	Enables the settings specified in the **Vertical Registration** section.

Dot Shading Removal removes areas of dot shading created by dithering in black and white images.

Dot Shading Removal settings	
Setting	**Description**
Min. Area Height	Height, in pixels, of the smallest dot-shaded area to be processed. The default value is 50.
Min. Area Width	Width, in pixels, of the smallest dot-shaded area to be processed. The default value is 100.
Max. Dot Size	Maximum size, in pixels, that makes up the dot shading. The default value is 5.
Horizontal Size Adjust	Number of pixels to be used as the horizontal adjustment value by the Dot Shading Removal function. For example, if some dots in the shade are 2 pixels wider than

Dot Shading Removal settings	
Setting	**Description**
	the Max Dot Size, entering a value of 2 instructs the system to remove dots that are 7 pixels wide. This number can also be negative.
Vertical Size Adjust	Number of pixels to be used as vertical adjustment value by the dot-shading removal function. For example, if some dots in the shade are 2 pixels bigger than the Max Dot Size, entering a value of 2 instructs the system to remove dots that are 7 pixels tall. This number can also be negative.
Character Protection	Protects portions of characters from being removed.
Enable Option	Enables the settings specified in the **Dot Shading Removal** section.

Speck Removal cleans the image by removing any specks smaller than the parameters assigned.

Speck Removal settings	
Setting	**Description**
Horiz. Speck Removal	Deletes groups of horizontal lines less than the number of pixels entered.
Vert. Speck Removal	Deletes groups of vertical lines less than the number of pixels entered.
Isolated Despeck	Deletes all specks, but leaves anything else less than the number of pixels entered.
Period Height	Height, in pixels, of periods found in the image. Only specks less than this value is deleted. Therefore, the periods remain.
Expected Frequency	Approximate frequency in pixels of the speck location on in the document.
Enable Option	Enables the settings specified in the **Speck Removal** section.

Horizontal Line Management is used to set parameters for the deletion of horizontal lines in the image.

Horizontal Line Management settings	
Setting	**Description**
Min. Line to Detect	Minimum size, in pixels, of horizontal lines to be deleted. This value must be large enough to ensure that horizontal lines such as the cross of a "T" are not removed.
Max. Line Thickness	Maximum thickness, in pixels, of horizontal lines to be deleted. The default value is 20.
Max. Line Gap	Size of the gap, in pixels, that must be considered as a continuous line. This feature is useful when the image quality is poor and portions of lines are not visible.
Edge Cleaning Factor	Cleans the edges of the lines being removed. Enter the extra number of pixels you want to be cleaned here.
Reconstruction Size	Maximum width, in pixels, of characters to be reconstructed if line removal removes intersected characters.

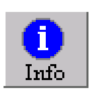
Horizontal Line Management settings	
Setting	**Description**
Enable Option	Enables the settings specified in the **Horizontal Line Management** section.

Vertical Line Management is used to set parameters for the deletion of vertical lines in the image.

Vertical Line Management settings	
Name	**Description**
Min. Line to Detect	Minimum size, in pixels, of vertical lines to be deleted. This value must be large enough to ensure that horizontal lines such as the vertical portions of the letter "H" are not removed.
Max. Line Thickness	Maximum thickness, in pixels, of vertical lines to be deleted. The default value is 20.
Max. Line Gap	Size of the gap, in pixels, that must be considered as a continuous line. This feature is useful when the image quality is poor and portions of lines are not visible.
Edge Cleaning Factor	Cleans the edges of the lines being removed. Enter the extra number of pixels you want to be cleaned here.
Reconstruction Size	Maximum width, in pixels, of characters to be reconstructed if line removal removes intersected characters.
Enable Option	Enables the settings specified in the **Vertical Line Management** section.

Viewing Document Information

To view general document information, click **Info,** or select **File > Document Info.**



The **Document Information** window appears.

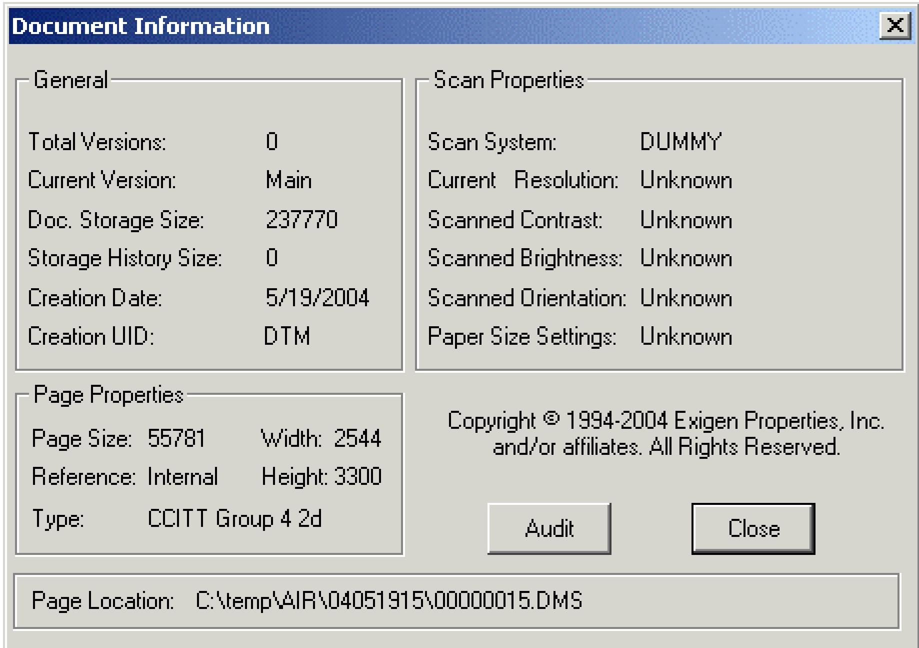


Figure 119: Viewing document information

The **Document Information** dialog displays general information, scan properties, page properties, and the image location of the currently opened page.

Viewing Audit Information

To view document audit information, click **Audit.** The **Document Audit** dialog appears.

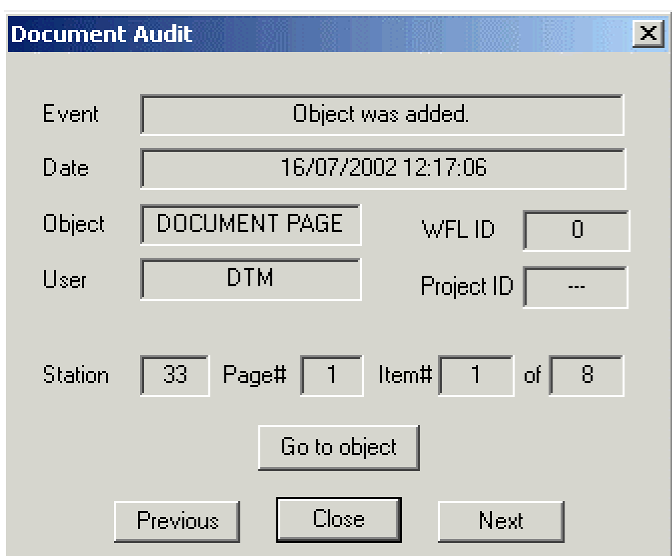


Figure 120: Viewing document audit information

The **Document Audit** dialog displays events that occurred involving this document. For example, if edit tool objects have been added to the document, the following data is available via Document Audit:

- date the event occurred
- object, for example, posted notes
- user who initiated the event
- document workflow ID
- document project ID
- workstation
- page number where the event occurred
- item number of the event

Events are described in the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Appendix D: Audit Data in Exigen Workflow.

The **Previous** and **Next** buttons allow you to navigate through the events.

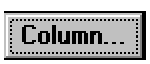
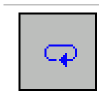
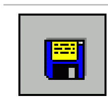
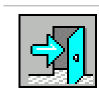
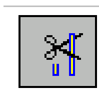
Appendix A: Exigen Workflow Menus and Buttons

This section describes menu and button bars for the following components:

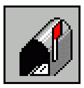
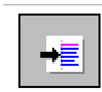
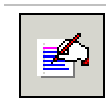
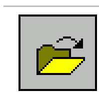
- High Volume Scan
- High Volume Index
- Low Volume Scan
- Inspect
- Queue
- Commit
- Retrieve
- Image Viewer

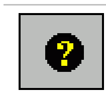
High Volume Scan

The menu and button bars in the **High Volume Scan** window contain the following utilities:

High Volume Scan window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
 			**Form/Column Button** Switches between displaying the contents of the queue in either the Form or Column style.
	**File > Refresh**	**F5**	**Refresh** Updates the batch list to display any new batches that have been sent to this queue. After a work break, the batch list must be refreshed.
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	**File > Exit**	**F12**	**Exit** Closes the **High Volume Scan** window.
	**Edit > Edit Tools...**		**Edit Tools** Allows pages to be split, rearranged, and deleted within the selected document or two or more documents to be merged into one.

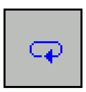
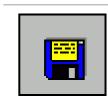
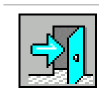
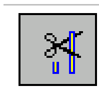
High Volume Scan window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Split Parcel		**Split Parcel** Divides one parcel containing more than one document into several parcels containing only one document each.
	Edit > Create New Parcel		**Create New Parcel** Creates a new parcel by removing selected documents from a selected parcel and placing them into a new one.
	Edit > Merge Parcels		**Merge Parcels** Merges two or more parcels into one.
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Parcel	**CTRL+DEL**	**Delete Parcel** Deletes the selected parcel.
	Edit > Modify Batch	**CTRL+E**	**Modify Batch** Allows the batch description or priority to be modified or edited.
	Edit > Delete Document	**SHIFT+DEL**	**Delete Document** Deletes the selected document from the parcel.
	Edit > Edit Document Description	**F3**	**Edit Document Description** Allows the document description to be modified or edited.
	Edit > Security		**Security** Assigns ACL based security settings to the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** These options are available only if ACL based security is activated.
	**Scan > Scan New Batch...**	**CTRL+S**	**Scan New Batch** Begins the scanning process by opening the **Scan Dialog** window.
	Scan > Attach Document to Parcel...	**CTRL+B**	**Attach Document to Parcel** Opens the **Scan Dialog** window to allow additional documents to be added to the selected batch.

High Volume Scan window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Scan > Modify Document Pages...	**CTRL+P**	**Modify Document Pages** Opens the **Scan Dialog** window to allow the pages of the selected document to be modified.
	Scan > Select Scan Engine...		**Select Scan Engine** Loads a scan engine.
	Send > Select All Parcels	**CTRL+A**	**Select All Parcels** Selects all the scanned batches that are ready to be sent to the next queue in the workflow.
	**Send > Send Parcel...**	**F10**	**Send Parcel** Opens the **Send Manager** dialog box, allowing selected batches to be sent to the next queue in the workflow.
	Send > Send To Fix...		**Send To Fix** Sends the selected parcels to the designated Fix Queue for processing.
	Send > Save Send Configuration		**Save Send Configuration** Automatically sends all parcels and documents to the previously specified queue and user. If this option is checked, the **Send Parcels/Documents** window does not appear when **Send** is selected.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Opens the Image Viewer on the right side of the window for document viewing. If the checkout function is disabled, documents can be both viewed and edited.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	**View > Parcel View...**	**CTRL+F**	**Parcel View** Displays the first page of each document in the selected parcel.
	View > My Statistics		**My Statistics** Displays statistics for the current queue and user combination.

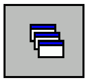
High Volume Scan window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of document versions, and allows deleting versions and changing the active version.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.
	**Task**		**Task** Lists all tasks that are assigned to the queue and for which the **Launch Task (No Document is Created)** option is enabled. Clicking a task opens the appropriate external application, but does not allow document creation. The **Task** menu and task buttons are displayed only if tasks with the **Launch Task (No Document is Created)** option are assigned to the queue.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

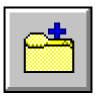
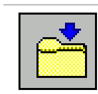
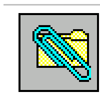
High Volume Index

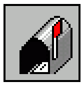
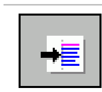
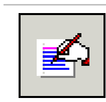
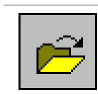
The button and menu bars of the **High Volume Index** window contain the following utilities:

High Volume Index window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
Form... Column...			**Form/Column Button** Switches between displaying the contents of the queue in either Form or Column style.
Get from COM Get from FIX			**Get From COM/FIX** Pulls jobs from either the Com or Fix Queue.
	**File > Refresh**	**F5**	**Refresh** Updates the parcel list to display any new parcels that have been sent to this queue. The queue must be refreshed after returning from a break.
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts an outside application. The application can be defined either in the workflow or the individual queue.
	**File > Exit**	**F12**	**Exit** Closes the **High Volume Index** window.
	**Edit > Edit Tools...**		**Edit Tools** Allows pages to be split, rearranged, and deleted within the selected document or two or more documents to be merged into one.
	**Edit > Query Parcel Records...**	**CTRL+Q**	**Query Parcel Records** Allows a search for parcels located in the High Volume Index queue that match certain search criteria.

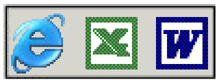
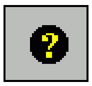
High Volume Index window button definitions

Button	Menu Option	Shortcut Key	Description
	**Edit > Split Parcel**		**Split Parcel** Divides one parcel containing more than one document into several parcels containing only one document each.
	Edit > Create New Parcel		**Create New Parcel** Creates a new parcel by removing selected documents from a selected parcel and placing them into a new one.
	Edit > Merge Parcels		**Merge Parcels** Merges two or more parcels into one.
	Edit > Create Reference Document		**Create Reference Document** Creates a copy of the document in the same parcel. The parcel can be split, and the document can be indexed in more than one folder without having to scan the document several times.
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Parcel	**CTRL+ DEL**	**Delete Parcel** Deletes the selected parcel.
	Edit > Modify Parcel	**CTRL+O**	**Modify Parcel** Modifies the parcel description or priority.
	Edit > Delete Document	**SHIFT+ DEL**	**Delete Document** Deletes the selected document from the parcel.
	Edit > Edit Document Description	**F3**	**Edit Document Description** Allows the document description to be modified or edited.
	Edit > Modify Additional Document Fields...		**Modify Additional Document Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields of the document.
	Edit > Modify Current Folder…	**F8**	**Modify Current Folder** Opens the **Add/Modify Folder** window, allowing values to be modified in all of the existing non-default fields used for indexing.

High Volume Index window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Modify Additional Parcel Fields…		**Modify Additional Parcel Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields used for indexing.
	Edit > Security		**Security** Assigns ACL based security settings to the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** These options are available only if ACL based security is activated.
	**Index > Assign to New Folder...**	**F6**	**Assign to a New Folder** Opens the **Add/Modify Folder** window, allowing a new folder to be created. Once created, a parcel can be indexed to this new folder.
	**Index > Assign to Existing Folder...**	**F7**	**Assign to an Existing Folder** Opens the **Find Existing Folder** window, allowing a parcel to be indexed to an existing folder.
	**Index > Assign to Subfolder and Document Type...**	**F9**	**Assign to Subfolder and Document Type** Opens the **Assign to Subfolder and/or Document Type** window, allowing the selected document to be assigned to a subfolder and document type.
	Work > Define Queue Settings...		**Define Queue Settings** Defines property settings for the queue, for example, the common queue, image, and host settings.
	Work > From Com		**From Com** Allows jobs to be pulled from the Com Queue.
	Work > From Fix		**From Fix** Allows jobs to be pulled from the Fix Queue.
	Send > Select All Indexed Parcels		**Select All Indexed Parcels** Highlights all parcels that have been assigned index values.

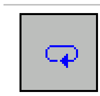
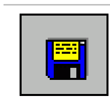
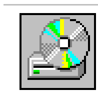
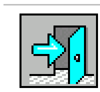
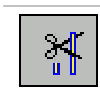
High Volume Index window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Send > Send Parcel...**	**F10**	**Send Parcel** Opens the **Send Manager** dialog box, allowing selected parcels to be sent to the next queue in the workflow.
	Send > Send to Fix		**Send to Fix** Sends the selected parcels to the designated Fix Queue for processing.
	Send > Send to Com		**Send to Com** Sends the selected batches to the designated Com Queue.
	Send > Send **Email...**		**Send Email** Allows packages of folders, parcels, and documents to be sent to another user via email.
	Send > Save Send Configuration		**Save Send Configuration** Automatically sends all parcels and documents to the previously specified queue and user. If this option is checked, the **Send Parcels/Documents** window does not appear when Send is selected.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Displays the first page of the selected document on the right side of the window.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	**View > Parcel View...**	**CTRL+F**	**Parcel View** Displays the first page of each document in the selected parcel.
	View > Related Parcels...		**Related Parcels** Displays all parcels that are indexed to the same folder as the highlighted parcel.
	View > My Statistics		**My Statistics** Displays statistics for the current queue and user combination.

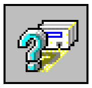
High Volume Index window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Show ERM as	**CTRL+W** for rich text format. **CTRL+E** for Excel format.	**ERM Display Setting** Selects the ERM display setting for document display at right: ▪ Default considers the auto-recognition of the required viewer type: Exigen Image Overlay Report Viewer is started if .dms overlay is assigned for the ERM model. Exigen Standard Report Viewer is started if there is no .dms overlay assigned. ▪ Plain Text starts the application for text file viewing defined in ERM Setup ▪ Rich Text Format ▪ Excel **Warning:** Settings for ERM display become effective only when the ERM process is enabled.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of document versions, and allows deleting versions and changing the active version.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.

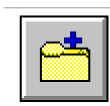
High Volume Index window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Task**		**Task** Lists all tasks available for the queue. A task is executed by clicking on it. The **Task** menu and task buttons are displayed only if tasks are available for the queue.
	**Help > Context Help**	**F1**	**Context Help** Displays context Help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available Help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

Low Volume Scan

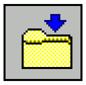
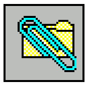
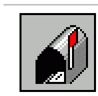
The button and menu bars in the **Low Volume Scan Queue** window contain the following utilities:

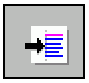
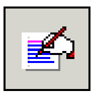
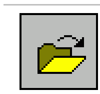
Low Volume Scan Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
Form... Column...			**Form / Column button** Switches between displaying the contents of the queue in either Form or Column styles.
Get from COM Get from FIX			**Get From COM/FIX** Pulls jobs from either the Com or Fix Queue.
	**File > Refresh**	**F5**	**Refresh** Updates the batch list to display any new batches sent to this queue. The queue must be refreshed after returning from a break
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	**File > Retrieve Optical**		**Retrieve Optical** Allows archived documents to be retrieved from permanent storage.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts an outside application. The application can be defined either in the workflow or the individual queue.
	**File > Exit**	**F12**	**Exit** Exits the **Low Volume Scan** window.
	**Edit > Edit Tools...**		**Edit Tools** Allows pages to be split, rearranged, and deleted within the selected document, or two or more documents to be merged into one.

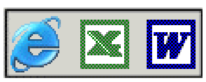
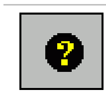
Low Volume Scan Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Edit > Query Parcel Records…**	**CTRL+Q**	**Query Parcel Records** Allows a search for parcels located in the Low Volume Scan queue that match certain search criteria.
	Edit > Split Parcel		**Split Parcel** Divides one parcel containing more than one document into several parcels containing only one document each.
	Edit > Create New Parcel		**Create New Parcel** Creates a new parcel by removing selected documents from a selected parcel and placing them into a new one.
	Edit > Merge Parcels		**Merge Parcels** Merges the selected parcels into one.
	Edit > Create Reference Document		**Create Reference Document** Creates a copy of the document in the same parcel. The parcel can be split, and the document can be indexed in more than one folder without having to scan the document several times.
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Parcel	**CTRL+DEL**	**Delete Parcel** Deletes the selected parcel.
	Edit > Modify Parcel…	**CTRL+O**	**Modify Parcel** Allows the parcel description or priority to be modified or edited in the **Modify Parcel** window.
	Edit > Delete Document	**SHIFT+DEL**	**Delete Document** Deletes the selected document from the parcel.
	Edit > Edit Document Description	**F3**	**Edit Document Description** Allows the document description to be modified or edited.

Low Volume Scan Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Modify Additional Document Fields...	**F11**	**Modify Additional Document Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields of the document.
	Edit > Modify Additional Parcel Fields…		**Modify Additional Parcel Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields used for indexing.
	Edit > Modify Current Folder…	**F8**	**Modify Current Folder** Opens the **Add/Modify Folder** window, allowing values to be modified in all of the existing non-default fields used for indexing.
	Edit > Security		**Security** Assigns ACL based security settings to the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** These options are available only if ACL based security is activated.
	**Scan > Scan New Batch...**	**CTRL+S**	**Scan New Batch** Starts the scanning process by opening the **Scan Dialog** window.
	Scan > Attach Document to Parcel…	**CTRL+B**	**Attach Document to a Parcel** Opens the **Scan Dialog** window to allow a document to be scanned into the selected parcel.
	Scan > Modify Document Pages...	**CTRL+P**	**Modify Document Pages** Opens the **Scan Dialog** window, allowing pages to be added to the selected document.
	Scan > Select Scan Engine…		**Select Scan Engine** Loads a scan engine.
	**Index > Assign to New Folder...**	**F6**	**Assign to a New Folder** Opens the **Add/Modify Folder** window, allowing a new folder to be created. Once created, a parcel can be indexed to this new folder.

Low Volume Scan Queue window button definitions

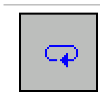
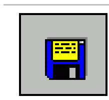
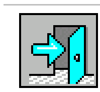
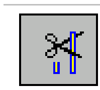
Button	Menu Option	Shortcut Key	Description
	**Index > Assign to Existing Folder...**	**F7**	**Assign to an Existing Folder** Opens the **Find Existing Folder** window, allowing a parcel to be indexed to an existing folder.
	**Index > Assign to Subfolder and Document Type**	**F9**	**Assign to Subfolder and Document Type** Opens the **Assign to Subfolder and/or Document Type** window, allowing the selected document to be assigned to a subfolder and document type.
	Work > Define Queue Settings...		**Define Queue Settings** Defines property settings for the queue, for example, the common queue, image, and host settings.
	Work > From Com		**From Com** Allows jobs to be pulled from the Com Queue.
	Work > From Fix		**From Fix** Allows jobs to be pulled from the Fix Queue.
	Send > Select All Indexed Parcels		**Select All Indexed Parcels** Highlights all parcels that have been assigned all index values such as folder, subfolder, and document type.
	**Send > Send Parcel...**	**F10**	**Send Parcel** Opens the **Send Manager** dialog box, allowing selected parcels to be sent to the next queue in the workflow.
	Send > Send To Fix		**Send To Fix** Sends the selected parcels to the designated Fix Queue for processing.
	Send > Send Email		**Send Email** Allows packages of folders, parcels, and documents to be sent to another user via email.

Low Volume Scan Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Send > Save Send Configuration		**Save Send Configuration** Automatically sends all parcels and documents to the previously specified queue and user. If this option is checked, the **Send Parcels/Documents** window does not appear when Send is selected.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Opens the Image Viewer on the right side of the window for document viewing. If the checkout function is disabled, documents can be both viewed and edited.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	**View > Parcel View**	**CTRL+F**	**View Parcel** Displays the tiles of images of the first pages of documents in the selected parcel.
	View > View Related Parcels		**View Related Parcels** Displays all parcels that are indexed to the same folder as the selected parcel.
	View > My Statistics		**My Statistics** Displays statistics for the current queue and user combination.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of document versions, and allows deleting versions and changing the active version.

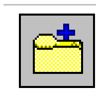
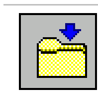
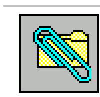
Low Volume Scan Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.
	**Task**		**Task** Lists all tasks available for the queue. A task is executed by clicking on it. The **Task** menu and task buttons are displayed only if tasks are available for the queue.
	**Help > Context Help**	**F1**	**Context Help** Displays context Help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available Help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

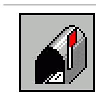
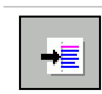
Inspect

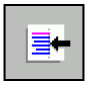
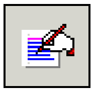
The button and menu bars in the **Inspect** window contain the following utilities:

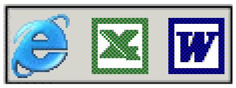
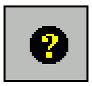
Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
 			**Form / Column button** Switches between displaying the contents of the queue in either Form or Column styles.
 			**Get From COM/FIX** Pulls jobs from either the Com or Fix Queue.
	**File > Refresh**	**F5**	**Refresh** Updates the parcel list to display any new parcels that have been sent to this queue. The queue must be refreshed after returning from a break.
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts an outside application. The application can be defined either in the workflow or the individual queue.
	**File > Exit**	**F12**	**Exit** Closes the **Inspect** window.
	**Edit > Edit Tools...**		**Edit Tools** Allows pages to be split, rearranged, and deleted within a selected document or two or more documents to be merged into one.
	**Edit > Query Parcel Records...**	**CTRL+Q**	**Query Parcel Records** Allows a search for parcels located in the Inspect queue that match certain search criteria.

Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Split Parcel		**Split Parcel** Divides one parcel containing more than one document into several parcels containing only one document each.
	Edit > Create New Parcel		**Create New Parcel** Creates a new parcel by removing selected documents from a selected parcel and placing them into a new one.
	Edit > Merge Parcels		**Merge Parcels** Merges two or more parcels into one.
	Edit > Create Reference Document		**Create Reference Document** Creates a copy of the document in the same parcel. The parcel can be split, and the document can be indexed in more than one folder without having to scan the document several times.
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Parcel	**CTRL+DEL**	**Delete Parcel** Deletes the selected parcel.
	Edit > Delete Document	**SHIFT+DEL**	**Delete Document** Deletes the selected document from the parcel.
	Edit > Edit Document Description	**F3**	**Edit Document Description** Allows the document description to be modified or edited.
	Edit > Modify Additional Document Fields...	**F11**	**Modify Additional Document Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields of the document.
	Edit > Modify Additional Parcel Fields…		**Modify Additional Parcel Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields used for indexing.

Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Modify Current Folder…	**F8**	**Modify Current Folder** Opens the **Add/Modify Folder** window, allowing values to be modified in all of the existing non-default fields used for indexing.
	Edit > Security		**Security** Assigns ACL based security settings to the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** These options are available only if ACL based security is activated.
	Scan > Attach Document to Parcel	**CTRL+B**	**Attach Document to Parcel** Opens the **Scan Dialog** window to allow a document to be scanned into the selected parcel.
	Scan > Modify Document Pages...	**CTRL+P**	**Modify Document Pages** Opens the **Scan Dialog** window, allowing additional pages to be added to the selected document.
	Scan > Select Scan Engine…		**Select Scan Engine** Loads the scan engine.
	**Index > Assign to New Folder...**	**F6**	**Assign to a New Folder** Opens the **Add/Modify Folder** window, allowing a new folder to be created. Once created, a parcel can be indexed to this new folder.
	**Index > Assign to Existing Folder...**	**F7**	**Assign to an Existing Folder** Opens the **Find Existing Folder** window, allowing a parcel to be indexed to an existing folder.
	**Index > Assign to Subfolder and Document Type...**	**F9**	**Assign to Subfolder and Document Type** Opens the **Assign to Subfolder and/or Document Type** window, allowing the selected document to be assigned to a subfolder and document type.

Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Inspect > Apply Changes**	**CTRL+S**	**Apply Changes** Saves changes made to the document.
	Work > Define Queue Settings...		**Define Queue Settings** Defines property settings for the queue, for example, the common queue, image, and host settings.
	Work > From Com		**From Com** Allows jobs to be pulled from the Com Queue.
	Work > From Fix		**From Fix** Allows jobs to be pulled from the Fix Queue.
	Send > Select All Inspected Parcels		**Select All Inspected Parcels** Selects all inspected parcels.
	**Send > Send Parcel**	**F10**	**Send** Opens the **Send Manager** dialog box, allowing selected parcels to be sent to the next queue in the workflow.
	Send > Send To Fix		**Send To Fix** Sends the selected parcels to the designated Fix Queue for processing.
	Send > Send to Com		**Send to Com** Sends the selected parcels to the designated Com Queue for processing.
	Send > Send Email		**Send Email** Allows packages containing folders, parcels, and documents to be sent to another user via email.
	Send > Save Send Configura-tion		**Save Send Configuration** Automatically sends all parcels and documents to the previously specified queue and user. If this option is checked, the **Send Parcels/Documents** window does not appear when Send is selected
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Displays the image of the first page of the selected document in the Image Viewer on the right side of the window.

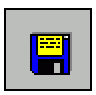
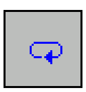
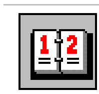
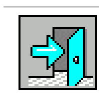
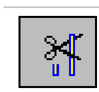
Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**View > Left Image Display**	**CTRL+L**	**Left Image Display** Displays the image of the first page of the selected document in the Image Viewer on the left side of the window.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	View > Parcel View	**CTRL+F**	**Parcel View** Displays the first page of each document in the selected parcel.
	View > View Related Parcels		**View Related Parcels** Displays all parcels that are indexed to the same folder as the selected parcel.
	View > My Statistics		**My Statistics** Displays statistics for the current queue and user combination.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of all versions of the selected document. The current version is displayed at the bottom of the list.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.

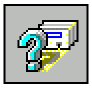
Inspect Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.
	**Task**		**Task** Lists all tasks available for the queue. A task is executed by clicking on it. The **Task** menu and task buttons are displayed only if tasks are available for the queue.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

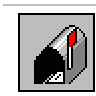
Queue

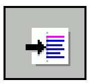
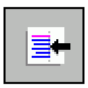
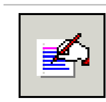
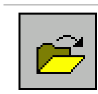
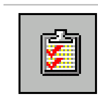
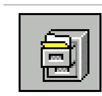
The button and menu bars of the **Queue** window contain the following utilities:

Queue window button definitions

Button	Menu Option	Shortcut Key	Description
Form... Column...			**Form / Column button** Switches between displaying the contents of the queue in either Form or Column styles.
Get from COM Get from FIX			**Get From COM/FIX** Pulls jobs from either the Com or Fix Queue.
			**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	**File > Refresh**	**F5**	**Refresh** Updates the parcel list to display any new parcels that have been sent to this queue. The queue must be refreshed after returning from a break
	File > Print Document(s)		**Print Document** Opens the print dialog box, which allows you to print a selected document.
	**File > Set To Hold**	**CTRL+H**	**Set to Hold** Allows you to change the parcel status from Active to Hold or vice versa.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts an outside application. The application can be defined either in the workflow or the individual queue.
	**File > Exit**	**F12**	**Exit** Closes the **Queue** window.
	**Edit > Edit Tools...**		**Edit Tools** Allows pages to be split, rearranged, and deleted within a selected document or two or more documents to be merged into one.

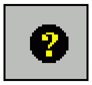
Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Edit > Query Parcel Records…**	**CTRL+Q**	**Query Parcel Records** Allows a search for parcels located in the queue that match certain search criteria.
	Edit > Split Parcel		**Split Parcel** Divides one parcel containing more than one document into several parcels containing only one document each.
	Edit > Create New Parcel		**Create New Parcel** Creates a new parcel by removing selected documents from a selected parcel and placing them into a new one.
	Edit > Merge Parcels		**Merge Parcels** Merges selected parcels into one.
	Edit > Create Reference Document		**Create Reference Document** Creates a copy of the document in the same parcel. The parcel can be split, and the document can be indexed in more than one folder without having to scan the document several times.
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Parcel	**CTRL+DEL**	**Delete Parcel** Deletes the selected parcel.
	Edit > Delete Document	**SHIFT+DEL**	**Delete Document** Deletes the selected document from the parcel.
	Edit > Modify Document Description…	**F3**	**Modify Document Description** Allows the document description to be modified or edited.
	Edit > Modify Additional Document fields…		**Modify Additional Document Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields of the document.
	Edit > Modify Document Indexing Data…	**F9**	**Modify Document Indexing Data** Opens the **Assign to Subfolder and/or Document Type** window, allowing the selected document to be assigned to a subfolder and document type.

Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Modify Additional Parcel fields…		**Modify Additional Parcel Fields** Opens the **Modify Field** dialog box, allowing values to be entered in all of the existing non-default fields of the parcel.
	Edit > Modify Folder...	**F8**	**Modify Folder** Opens the **Modify Folder** window allowing you to modify folder index fields.
	Edit > Security		**Security** Assigns ACL based security settings to the selected document, folder, or subfolder. The following options are available: • **Document** • **Folder** • **Subfolder** These options are available only if ACL based security is activated.
	**Send > Send Parcel...**	**F10**	**Send Parcel(s)** Opens the **Send Parcel(s) To** dialog box, allowing selected parcels to be sent to the next queue in the workflow.
	Send > Send Document…	**F11**	**Send Document** Opens the **Send Document(s)** dialog box, allowing selected documents to be sent to the next queue in the workflow.
	Send > Send to Fix		**Send to Fix** Sends the selected parcels to the designated Fix Queue for processing.
	Send > Send to Com		**Send to Com** Sends the selected parcels to the designated Com Queue for processing.
	Send > Send Email		**Send Email** Allows packages of folders, parcels, and documents to be sent to another user via email.
	Send > Save Send Configuration		**Save Send Configuration** Automatically sends all parcels and documents to the previously specified queue and user. If this option is checked, the **Send Parcels/Documents** window does not appear when Send is selected.

Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Work > Define Queue Settings		**Define Queue Settings** Defines property settings for the queue, for example, the common queue, image, and host settings.
	Work > From Com		**From Com** Allows jobs to be pulled from the Com Queue.
	Work > From Fix		**From Fix** Allows jobs to be pulled from the Fix Queue.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Displays the **Image Viewer** window on the right side of the window.
	**View > Left Image Display**	**CTRL+L**	**Left Image Display** Displays the **Image Viewer** window on the left side of the window.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	**View > Parcel View...**	**CTRL+V**	**Parcel View** Displays the first page of each document in the selected parcel.
	**View > Task History...**		**Task History** Opens the **Task History** window, displaying history information on the selected parcel.
	**View > Folder Snapshot...**		**Folder Snapshot** Opens the **Folder Snapshot** window, displaying the location in the workflow of each document assigned to the same folder as the selected parcel.
	View > Parcels		**View Parcels** Allows a parcel to be viewed and selected based on its status such as Active, Hold, or Expired.

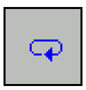
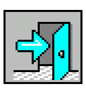
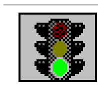
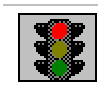
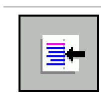
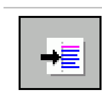
Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > View Related Parcels		**View Related Parcels** Displays all parcels that are indexed to the same folder as the selected parcel.
	View > My Statistics		**My Statistics** Displays statistics for the current queue and user combination.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of all versions of the selected document. The current version is displayed at the bottom of the list.
	View > Show ERM (left) as	**CTRL+W** for rich text format. **CTRL+E** for Excel format.	**Left ERM Display Setting** Selects the ERM display setting for document display at left: ▪ Default considers the auto-recognition of the required viewer type: Exigen Image Overlay Report Viewer is started if .dms overlay is assigned for the ERM model. Exigen Standard Report Viewer is started if there is no .dms overlay assigned. ▪ Plain Text starts the application for text file viewing defined in ERM Setup ▪ Rich Text Format ▪ Excel **Warning:** Settings for the ERM Display become effective only when the ERM process is enabled.

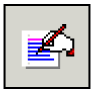
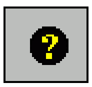
Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Show ERM (right) as		**Right ERM Display Setting** Selects the ERM display setting for document display at right: ▪ Default considers the auto-recognition of the required viewer type: Exigen Image Overlay Report Viewer is started if .dms overlay is assigned for the ERM model. Exigen Standard Report Viewer is started if there is no .dms overlay assigned. ▪ Plain Text starts the application for text file viewing defined in ERM Setup ▪ Rich Text Format ▪ Excel **Warning:** Settings for the ERM Display become effective only when the ERM process is enabled.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.
	**Task**		**Task** Lists all tasks available for the queue. Click on a task to execute it. The **Task** menu and task buttons are displayed only if tasks are available for the queue.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.

Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

Commit

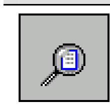
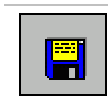
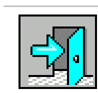
The button and menu bars of the **Commit Queue** window contain the following utilities:

Commit Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**File > Refresh**	**F5**	**Refresh** Updates the list of documents to display all new documents that have been sent to this queue. The queue must be refreshed after returning from a break.
	File > Recover		**Recover** Recovers all documents that may have been locked due to a system crash.
	**File > Exit**		**Exit** Closes the **Commit** window.
	**Commit > Setup...**	**CTRL+F**	**Setup** Opens either the **Optical Disk/Jukebox Management** window or the **Image Server Setup** window.
	**Commit > Start**	**CTRL+C**	**Start** Starts the commit process.
	**Commit > Stop**	**CTRL+S**	**Stop** Stops the commit process.
	**View > Left Display**	**CTRL+L**	**Left Display** Displays the **Image Viewer** window on the left side of the window.
	**View > Right Display**	**CTRL+R**	**Right Display** Displays the **Image Viewer** window on the right side of the window.

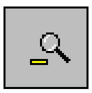
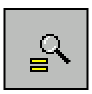
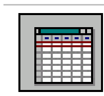
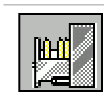
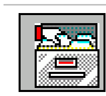
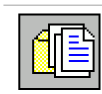
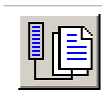
Commit Queue window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

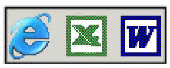
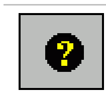
Retrieve

The button and menu bars of the **Retrieve** window contain the following utilities:

Retrieve window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**File > Find ...**		**Find** Starts a search.
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts the Host Session associated with the Retrieve object.
	**File > Exit**	**F12**	**Exit** Closes the **Retrieve Folder/Subfolder/Document** window.
	Edit > Undo	**ALT+BkSp**	**Undo** Reverses the last action.

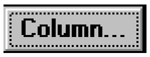
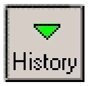
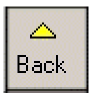
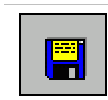
Retrieve window button definitions

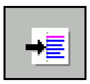
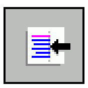
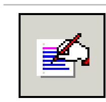
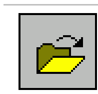
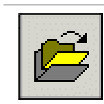
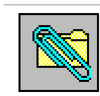
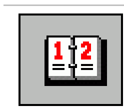
Button	Menu Option	Shortcut Key	Description
	Edit > Cut	**SHIFT+DEL**	**Cut** Cuts the selection and puts it into the Clipboard.
	Edit > Copy	**CTRL+INS**	**Copy** Copies the selection and puts it into the Clipboard.
	Edit > Paste	**SHIFT+INS**	**Paste** Inserts the Clipboard contents at the insertion point.
	Edit > Clear	**DEL**	**Clear** Removes the selected portion.
	**Options > Clear Field...**	**F7**	**Clear Field** Clears the selected row only.
	**Options > Clear All...**	**F8**	**Clear All** Clears all search criteria.
	**Options > Switch to Result Window…**	**F5**	**Switch to Result Window** Switches to the **Query Results** window.
	**Query > By Folder**	**CTRL+F**	**Query by Folder** Switches to the Query by Folder mode, which lists the folder fields that can be used in queries.
	**Query > By Subfolder**	**CTRL+S**	**Query by Subfolder** Switches to the Query by Subfolder mode, which lists the subfolder fields that can be used in queries.
	**Query > By Document**	**CTRL+D**	**Query by Document** Switches to the Query by Document mode, which lists the document fields that can be used in queries.
	**Query > By Document Detail**	**CTRL+T**	**Query by Document Detail** Switches to the Query by Document Details mode, which lists the document detail, that is, property fields that can be used in queries.

Retrieve window button definitions			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Applications		**Applications** Lists the Workflow applications that can be accessed. The workflow currently being used is displayed in light gray with a check mark next to it.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.
	**Task**		**Task** Lists all tasks that are assigned to the queue and for which the **Launch Task (No Document is Created)** option is enabled. Clicking a task opens the appropriate external application, but does not allow document creation. The **Task** menu and task buttons are displayed only if tasks with the **Launch Task (No Document is Created)** option are assigned to the queue.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.

Retrieve Results

The button and menu bars in the Retrieve Results object perform the following functions:

Retrieve Results object buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
 			**Form / Column button** Switches between displaying the contents of the queue in either Form or Column styles.
			**History** Displays previous folder documents. This button is enabled only if the folder history browsing option is configured, and a previous folder is available for viewing.
			**Back** Displays the previous view. This button is enabled only when a previous folder is selected.
	File > Refresh		**Refresh** Updates the information in the **Results** window to display all documents that have been retrieved.
	**File > Save Configuration**		**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	File > Activate Host Session	**CTRL+N**	**Activate Host Session** Starts the host session associated with the Retrieve object.
	File > Print Folder(s) / Subfolder(s) / Document(s)		**Print Folder, Subfolder or Document** Opens the **Print** dialog box, which allows either one or more selected document from the specified folder or subfolder to be printed. **Note:** The **Print Subfolder(s)** command is not available unless a folder is selected.
	File > Send **Email**		**Send Email** Allows packages of folders, parcels, and documents to be sent to another user via email.
	File > Send Note to Administrator	**F10**	**Send Note to Administrator** Allows a message to be sent to the Administrator, listing the attributes of the selected document and containing a note of explanation.

Retrieve Results object buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	Edit > Copy/Export Document	**CTRL+C**	**Copy/Export Document** Copies selected documents from the Exigen Workflow repository to a clipboard.
	Edit > Delete Document	**DEL**	**Delete Document** Deletes the selected document.
	Edit > ERM Text Search		**ERM Search** Performs a text search for ERM documents that are incorporated in the Exigen Workflow system by the ERM utility.
	**View > Right Image Display**	**CTRL+R**	**Right Image Display** Displays the **Image Viewer** window on the right side of the window.
	**View > Left Image Display**	**CTRL+L**	**Left Image Display** Displays the **Image Viewer** window on the left side of the window.
	**View > Modify Image**	**CTRL+M**	**Modify Image** Opens the Image Viewer on the right side of the window for document editing.
	**View > Folder View**	**CTRL+F**	**Folder View** Displays the first pages of each document in the selected folder.
	**View > Subfolder View**	**CTRL+U**	**Subfolder View** Displays the first pages of each document in the selected subfolder.
	View > Advanced Display Settings		**Advanced Display Settings** Opens the **Advanced display settings** dialog for specifying document display settings.
	**View > Show** **Stapled** **Documents**	**CTRL+S**	**Show Stapled Document** Displays all documents that are assigned to the same batch number as the selected document.
	**View > Show Status of Documents**	**CTRL+T**	**Show Status** Displays the status column in the document table.
	**View > Switch to Query Window**	**F5**	**Switch to Query Window** Switches to the **Query** window, allowing another search to be performed.

Retrieve Results object buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Choose Highlight Color		**Choose Highlight Color** Allows the selection of the color in which the search words in the documents are displayed when using Full Text Search.
	View > Show ERM (left) as	**CTRL+W** for rich text format. **CTRL+E** for Excel format.	**Left ERM Display Setting** Selects the ERM display setting for document display at left: ▪ Default considers the auto-recognition of the required viewer type: Exigen Image Overlay Report Viewer is started if .dms overlay is assigned for the ERM model. Exigen Standard Report Viewer is started if there is no .dms overlay assigned. ▪ Plain Text starts the application for text file viewing defined in ERM Setup ▪ Rich Text Format ▪ Excel **Warning:** Settings for the ERM Display become effective only when the ERM process is enabled.

Retrieve Results object buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	View > Show ERM (right) as		**Right ERM Display Setting** Selects the ERM display setting for document display at right: ▪ Default considers the auto-recognition of the required viewer type: Exigen Image Overlay Report Viewer is started if .dms overlay is assigned for the ERM model. Exigen Standard Report Viewer is started if there is no .dms overlay assigned. ▪ Plain Text starts the application for text file viewing defined in ERM Setup ▪ Rich Text Format ▪ Excel **Warning:** Settings for the ERM Display become effective only when the ERM process is enabled.
	View > Show Original	**CTRL+O**	**Show Original** Displays the selected document in its original format.
	View > Show Versions	**CTRL+V**	**Show Versions** Displays a list of all versions of the selected document. The current version is displayed at the bottom of the list.
	View > Task Toolbar Position		**Task Toolbar Position** Specifies the task toolbar position. The following options are available: • **Top** • **Top Next** • **Left** • **Right** • **Bottom**
	View > Default Toolbar		**Default Toolbar** Displays or hides the default toolbar.
	View > Task Toolbar		**Task Toolbar** Displays or hides the task toolbar.

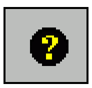
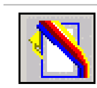
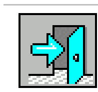
Retrieve Results object buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**Task**		**Task** Lists all tasks that are assigned to the queue and for which the **Launch Task (No Document is Created)** option is enabled. Clicking a task opens the appropriate external application, but does not allow document creation. The **Task** menu and task buttons are displayed only if tasks with the **Launch Task (No Document is Created)** option are assigned to the queue.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of available help topics.
	**Help > Context Help**	**F1**	**Context Help** Displays context help.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow copyright and release information.
			**Publisher Collector** Opens the Publisher Collector window.
	**File > Exit Retrieve Object...**	**F12**	**Exit** Closes the **Retrieve** window.

Image Viewer

The Image Viewer menus and button bar contain the following utilities:

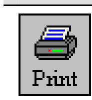
Image Viewer buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
			**Print** Opens the **Print** dialog box, allowing the image or zone to be sent to a printer or fax machine.
	File > Save	**CTRL+S**	Saves the document.
	File > Print/Fax Image...	**CTRL+P**	**Print / Fax Image** Sends the selected image to a printer or fax machine.

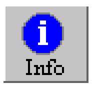
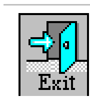
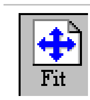
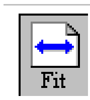
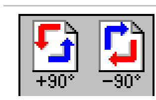
Image Viewer buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	File > Print/Fax Zone...	**CTRL+Z**	**Print/Fax Zone** Sends the selected zone to a printer or fax machine.
	File > Send Email	**CTRL+M**	**Send Email** Sends selected pages to another user by email.
	File > Save Config	**CTRL+C**	**Save Configuration** Saves the size and position of the current window for the next time when the window is opened.
	**File > Image Info**		**Image Info** Displays information about the current image.
	File > Document Notes	**F3**	**Document Notes** Opens the **Document Notes** window to add and view document notes.
	**File > Exit**	**F12**	**Exit** Closes the Image Viewer.
	View > Toolbar Hide/Show	**CTRL+T**	**Toolbar Hide/Show** Hides the toolbar if checked.
	View > Display Settings	**CTRL+D**	**Display Properties** Opens the **Display Settings** window to modify Image Viewer settings.
	**View > Best Fit**	**CTRL+B**	**Best Fit** Resizes the image to fit in the window.
	**View > Fit in Window**	**CTRL+W**	**Fit in Window** Resizes the image to fit horizontally in the window.
	View > Scale		**Scale** Reduces or enlarges image size.
	**View > Rotate**		**Rotate** Rotates an image 90 degrees, either clockwise or counterclockwise.
	View > Contrast		**Contrast** Increases or decreases contrast in an image for enhancement purposes.

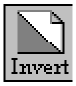
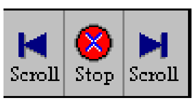
Image Viewer buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
	**View > Invert**	**CTRL+I**	**Invert** Changes the display of the image from black-on-white to white-on-black and vice versa.
	Page > Next Page	**PgDn**	**Next Page** Scrolls to the next page in the document.
	Page > Previous Page	**PgUp**	**Previous Page** Scrolls to the previous page in the document.
	Page > First Page	**Home**	**First Page** Skips to the first page in the document.
	Page > Last Page	**End**	**Last Page** Skips to the last page in the document.
	**Page > Auto Document Scroll > [<], [STOP], [>]**		**Auto Document Scroll** Automatically scrolls forward or backward through the document. The **Stop** option stops the scrolling.
	OCR > OCR Page		**OCR Page** Creates a text version of the displayed page.
	OCR > OCR Document		**OCR Document** Creates a text version of the entire document.
	OCR > OCR Zone		**OCR Zone** Creates a text version of a selected area on the page, outlined by using the cursor.
	Barcode > Document Info		**Document Info** Displays barcode information assigned to the specific document.
	Barcode > Read Barcode		**Read Barcode** Changes the pointer into a capture tool, allowing barcode values to be captured and displayed.
	Barcode > Select Engine		**Select Engine** Allows selecting the barcode engine.

Image Viewer buttons

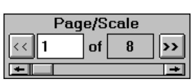
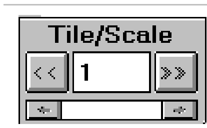
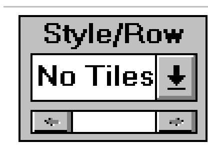
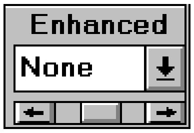
Button	Menu Option	Shortcut Key	Description
	**Find > Search Text**	**F6**	**Search** Opens the **Find** dialog box, allowing a document to be searched for specific words.
	Find > Show Result	**F7**	**Show Result** Displays a window containing the page numbers where the last search word is located.
	Stamp		**Stamp** Opens the **Stamp** window, allowing predefined rubber stamps to be applied to the image.
	Help > Context Help	**F1**	**Context Help** Displays context Help.
	Help > Help Topics	**CTRL+F1**	**Help Topics** Displays a list of Help topics.
	Help > About Exigen Workflow		**About Exigen Workflow** Displays Exigen Workflow version and copyright information.
			**Edit Tools** Opens the **Edit Tools** window, allowing images to be annotated.
			**Document Notes** Opens the **Document Notes** window, allowing comments to be viewed, added, or modified in the current document.
			**Page/Scale** Displays the current and total number of pages in the document. The buttons allow scrolling through the document. The scroll bar allows the image scale to be changed.
			**Tile/Scale** Displays the current tile number. The scroll bar allows the scale of the image tiles to be changed.
			**Style/Row** Allows the image tiles to be displayed on the left side or at the bottom of the Image Viewer. The **No Tiles** option removes all tiled images.

Image Viewer buttons			
Button	**Menu Option**	**Shortcut Key**	**Description**
			**Enhanced** Adjusts the contrast and uses the gray filter for clarity.
Remote			Reduces the display resolution to increase the display speed.
Hidden			Displays the hidden annotations on the page and allows creating and modifying hidden annotations.
Magnify			Displays the magnifying tool.
Filter			Applies the current filter settings to the image.
Edit security			If this check box is selected, a user creates secured annotations and can modify annotation security settings.

Appendix B: Document Versioning

Document versioning allows Exigen Workflow users to maintain different versions of the following types of documents:

- document images created in Exigen Workflow
- task documents created by external applications such as Word

Document versioning is not supported for ERM documents.

Users with the appropriate document versioning access rights can perform the following tasks:

- view a document version
- delete a document version
- designate a document version as current

The current document version is opened by default and processed in Exigen Workflow.

The following topics are included in this section:

- Setting Up Document Versioning
- Creating Document Versions
- Working with Document Versions

Setting Up Document Versioning

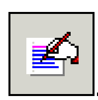
A system administrator must set up document versioning.

For information on setting up document versioning, see the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration*, Chapter 3: Creating Projects, Setting Up Document Versioning.

Creating Document Versions

Exigen Workflow users can create document versions in any node.

To create a version of an image document, proceed as follows:

1. Open a node, such as Retrieve, and select a document.
2. Select **View > Modify Image** or click the **Modify Image** icon: .
3. In the Image Viewer, make the required changes.

   For information on modifying images, see Chapter 11: Image Viewer.

4. Click **Apply** and **Close.**

To create a version of a task document, proceed as follows:

1. Open the document using the appropriate application, such as Word.
2. Modify the document.
3. Save the document under the same name.

A new version of the document is created and is designated as the current version. The previous version of the document is saved.

Working with Document Versions

The following conditions must be fulfilled for a user to view, delete, or designate a document version as current:

- The user must have the required access rights, as described in the *Exigen Workflow Administrator's Guide, Part 1: Design and Configuration,* Chapter 3: Creating Projects, Setting Up Document Versioning.
- More than one version of the document must be available.
- The user must be working in one of the following nodes:
  - Queue
  - Retrieve
  - Workflow Monitor

To work with document versions, proceed as follows:

1. In the Queue, Retrieve, or Workflow Monitor node, select the document.
2. Select **View > Show Versions.**

   The **Document versions** dialog appears.

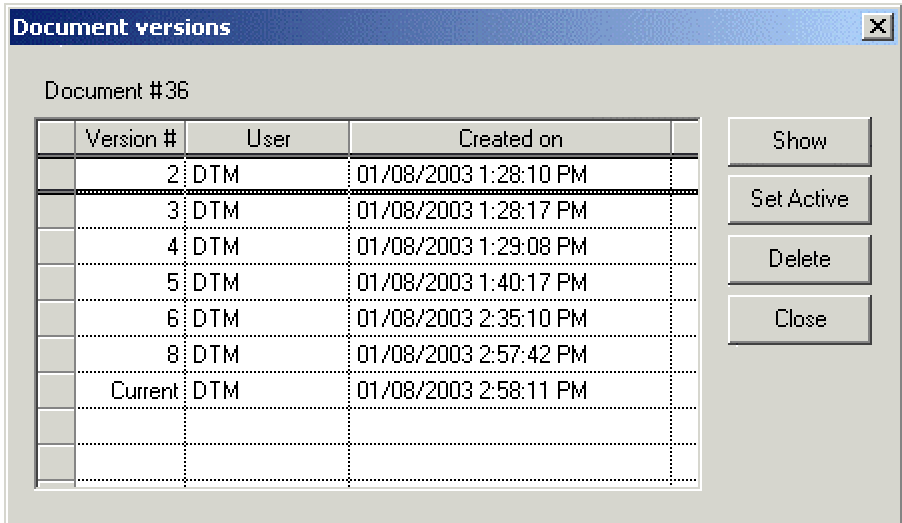


Figure 121: Working with document versions

3. To view a document, select it and click **Show.**
4. To set a document as current, select it and click **Set Active.**

   Setting another version as active can cause a situation where some audit events that are stored inside the DMS document are not synchronized with the database by Audit Server.

5. When prompted to confirm the action, click **Yes.**
6. To delete a document, select it and click **Delete.**
7. When prompted to confirm the action, click **Yes.**
8. To close the window, click **Close.**

Glossary

Glossary	
Term	**Explanation**
A	
access control entry	Permission and global group associated with a privilege in the ACL based security scheme. When a user assigns a privilege to a workflow resource, access control entries associated with that privilege define which users or groups can perform which actions with the workflow resource. **See also:** *ACL based security, global group, permission, privilege, resource*.
access control list	List of access control entries associated with a workflow resource that defines the security restrictions for system users in the ACL based security scheme. **See also:** *ACL based security, access control entry, resource*.
ACE	See *access control entry*.
Active Directory Synchronization Service	Service that retrieves and synchronizes user data so that users registered outside the Exigen Workflow system are not required to be registered individually by an Exigen Workflow administrator.
ACL	See *access control list*.
ACL based security	Exigen Workflow security scheme for specifying security restrictions on individual documents, folders, and subfolders. In the ACL based security scheme, users assign privileges to restrict actions that can be performed on workflow resources. **See also:** *privilege*.
ACL security entry	See *access control entry*.
active status	State in which a parcel can be processed. Unless otherwise specified, all parcels in the workflow are assigned active status.
activity	Event or sequence of events that occurs automatically as scheduled by the system administrator.
ad hoc node	Node that can exchange parcels with another ad hoc node from the same group without being connected with workflow links. In Workflow Builder, ad hoc nodes are identified by a yellow mark in the lower left corner.
Administrator	Application that performs administrative tasks in Exigen Workflow.
ADSync	See *Active Directory Synchronization Service*.
Advanced Event Server	Automatic workflow object that performs custom events on parcels sent through the workflow. The events replace manual processes and are transparent to the end user. Advanced Event Server is replaced by Automatic Queue Server, and should not be used for new applications. **See also:** *Automatic Queue Server.*
annotation	Element assigned to a document image by document reviewers in Image Viewer. **See also:** *Image Viewer*.

Glossary	
Term	**Explanation**
Application Services	Service that provides access to the Exigen Workflow data store. Application Services is required by Advanced Event Server and Automatic Queue Server. **See also:** *Advanced Event Server, Automatic Queue Server*.
audit	Exigen Workflow mechanism that records activities and errors in the Exigen Workflow system. **See also:** *Audit Server, Audit Viewer*.
audit filter	Set of conditions that define the audit data collected by the Exigen Workflow system.
Audit Server	Automatic workflow object that synchronizes DMS file audit data with the Exigen Workflow database. **See also:** *audit, DMS*.
Audit Viewer	Application for viewing Exigen Workflow audit records. **See also:** *audit*.
authentication	Method to identify Exigen Workflow users and grant access to system applications and resources. **See also:** *CCID Win32 authentication, database authentication, Genesys authentication, Win32 authentication, workflow authentication*.
Automatic Queue Server	Automatic workflow object that processes parcels in background mode without user interaction. Automatic Queue Server can be mapped to multiple custom scripts that implement customer-specific business logic. Automatic Queue Server handlers can be set up to process events. **See also:** *event, Exigen Workflow handlers.*
B	
bar code	Graphical machine-readable lines of varying widths. In Exigen Workflow documents, bar codes encode indexing information. **See also:** *Barcode Server*.
Barcode Server	Automatic workflow object that reads document bar codes and populates document index fields with the extracted information. **See also:** *bar code*.
batch	Group of documents that are scanned into the system together. This is the initial life cycle stage for scanned documents. **See also:** *scanning*.
C	
Capture Desktop	See *Interactive Document Capture Desktop.*
Capture Server	See *Interactive Document Capture Server.*
CCID Win32 authentication	Authentication mode that allows users to be authenticated by the current Windows user identity. Users are not required enter a login and password to access the Exigen Workflow system. This mode is also known as single sign-on.
Check Document Utility	Application to check the integrity of images in the system. If corrupt images are located, they can be sent to a specific node and user for special handling.

Glossary	
Term	**Explanation**
check-in and check-out	Functionality that prohibits documents from being modified by more than one user at a time.
Clear Cache Utility	Application to clear specific cache directories used to retrieve, edit, and view committed documents. **See also:** *committing*.
cluster index	Index that combines similar data in specific areas of the database. **See also:** *unique index.*
COM	Identifier of the default common user. **See also:** *common user*.
committing	Action to archive processed documents to a predefined storage medium. Committing is performed by the Commit object. **See also:** *Commit*.
Commit	Workflow object that archives documents to a predefined storage medium, such as an optical disk, magnetic file storage, or a third-party file storage system.
common user	Virtual user used as a common repository for documents that are sent to a specific group of users doing similar work. Users can access documents sent to the common user if they belong to the same workflow group. **See also:** *regular user, workflow group, COM.*
Component Configuration Manager	Application that creates and manages reusable workflow components such as plugins, applications, and nodes, which can be inherited by other components.
Configuration Browser	Application that manages configurations of Exigen Workflow components.
configuration schema	Template for a configuration section in Configuration Browser. Only the configuration parameters and items defined in the schema can be included in the configuration section.
corporate location	Definition of a geographical location or branch office where users are located. If a company has many employees performing the same functions in different cities, corporate locations can be used to restrict the destinations where parcels are sent.
D	
database authentication	Authentication mode that requires users to enter a login and password of the database account to access the Exigen Workflow system.
diagnosis	In E-Capture, a set of error codes that address typical business processing problems. For example, a diagnosis is used to automatically route documents that are missing required information.
Distribution Server	Workflow object that exports image files and database records from one database to another.
DMS	Internal Exigen Workflow file format to store document images and annotations. **See also:** *document image, annotation*.
DMS Viewer	See *Image Viewer*.

Glossary	
Term	**Explanation**
document	Most basic object in Exigen Workflow, either an image of a scanned document or an electronic document created using applications such as Notepad or Word. Documents can also be imported using Import Server, produced by Enterprise Report Management systems, or delivered by email. **See also:** *Enterprise Report Management, Import Server, scanning, task*.
document context security level	Security element associated with a global group that defines which users can perform which actions with document image editing tools in Image Viewer. **See also:** *global group, Image Viewer*.
document image	Image of a scanned or virtually printed document.
document type	Category assigned to Exigen Workflow documents for indexing purposes and for protecting documents against unauthorized users. **See also:** *indexing, document*.
document versioning	Feature that allows Exigen Workflow users to maintain different document versions.
E	
E-Capture	Set of applications used to extract index information and import PDF and PCL documents into Exigen Workflow. **See also:** *E-Capture Administrator, E-Capture Definition Utility, E-Capture Server, E-Capture Split Server*.
E-Capture Administrator	Application that configures and manages the E-Capture environment. **See also:** *E-Capture*.
E-Capture Definition Utility	Application that prepares E-Capture form templates for data recognition and extraction. **See also:** *E-Capture*.
E-Capture Server	Automatic workflow object that captures indexing information from PDF and PCL files. **See also:** *E-Capture*.
E-Capture Split Server	Optional E-Capture module that extracts small portions from PCL files and sends them to E-Capture Server for further processing. **See also:** *E-Capture*.
Empty Folders Maintenance Utility	Application that creates a file listing all folders to which no documents are assigned. This helps administrators identify and delete empty folders to free up space in the database. **See also:** *folder*.
Enhanced Form OCR	Exigen Workflow based module for processing electronic forms that includes optical and intelligent character recognition and data extraction. **See also:** *Form OCR Template Builder*.
Enterprise Report Management	Set of applications used to capture, index, and store report print streams in Exigen Workflow. **See also:** *ERM Indexer, ERM Setup, ERM Storage Maintenance, Report Definition Wizard*.

Glossary	
Term	**Explanation**
entitlement	Element in the ACL based security scheme associated with a privilege. An entitlement defines a set of rules by which privileges can be assigned to workflow resources automatically. **See also:** *ACL based security, privilege*.
ERM	See *Enterprise Report Management*.
ERM Indexer	Workflow object that imports data from report files into the Exigen Workflow system according to the parameters defined in the ERM Setup object. **See also:** *Enterprise Report Management, ERM Setup*.
ERM Report Viewer	Application used to view and annotate ERM reports in text format. **See also:** *Enterprise Report Management*.
ERM Report Queue Monitor	Component used by ERM Indexer to acquire an AS/400 report printstream directly from an AS/400 output queue. **See also:** *Enterprise Report Management*, *ERM Indexer.*
ERM Setup	Workflow object that registers report files, models, and templates for processing in Enterprise Report Management using ERM Indexer. **See also:** *Enterprise Report Management*.
ERM Storage Maintenance	Workflow object used to move ERM storage files from the original location to any other location on the network, including optical storage. **See also:** *Enterprise Report Management*.
Escalation Server	Automatic workflow object that routes parcels through the workflow depending on time restrictions on how long parcels remain in a specific node.
event	Predefined, automatic action performed on parcels. Events are assigned to links between workflow nodes. An event is activated when a parcel travels through the associated workflow link. **See also:** *Event Server, link, node*, *Automatic Queue Server.*
Event Server	Automatic workflow object that processes events when parcels travel through workflow links. Event Server is replaced by Automatic Queue Server, and should not be used for new applications. **See also:** *event, link, Automatic Queue Server.*
Exigen E-Forms	Application that captures information in electronic forms via the Internet.
Exigen Integrator	Application to connect to and retrieve data from disparate sources.
Exigen E-Mail	Web application used by company employees to perform the following tasks: • receive and send emails, including sending email responses automatically • maintain incoming and outgoing email history • maintain the rules and events system to process the emails • maintain the knowledge base used for composing and responding to emails
Exigen Workflow	Customizable workflow management and document imaging system. Exigen Workflow enables system administrators to create workflow applications for solving document management problems. End users use these applications to scan, import, index, view, route, archive, and retrieve documents.

Glossary	
Term	**Explanation**
Exigen Workflow Explorer	Application to launch Exigen Workflow objects and configure the user desktop.
Exigen Workflow handlers	Handlers that use Automatic Queue Server processes to perform workflow jobs. Exigen Workflow handlers can be used in place of Exigen Workflow servers.
Exigen Workflow Web	Exigen Workflow web solution that allows users to perform basic operations in the Exigen Workflow system through a web browser. **See also:** *Exigen Workflow*.
expired status	Status given to a parcel after the due date and time are reached. **See also:** *parcel*.
F	
FIX	Identifier of the default fix user. **See also:** *fix user*, *Fix Queue.*
Fix Queue	Queue that handles batches or parcels that cannot be correctly processed in the workflow. **See also:** *fix user*, *FIX.*
fix user	Virtual user to whom other users send defective documents. **See also:** *FIX*, *Fix Queue.*
folder	Level in the document indexing hierarchy. In Exigen Workflow, folders can contain documents and subfolders. Users can retrieve documents based on assigned folder field values. **See also:** *indexing, subfolder*.
folder and subfolder security group	User group that restricts access to individual folders and subfolders in the role based security scheme. **See also:** *folder, role based security, subfolder*.
form	Document with a specific graphical pattern that can be used for automatic extraction of indexing information. **See also:** *Enhanced Form OCR, form OCR, optical character recognition*.
form category	In E-Capture, a logical grouping of forms within a policy type. For example, all form types used for customer evaluation can be grouped as a form category named Evaluations.
Form Index Server	Automatic workflow object that populates the database with data extracted from forms during the form OCR process. **See also:** *form, form OCR*.
Form OCR Template Builder	Component that creates form templates used to extract information from incoming scanned documents using OCR. The incoming documents are forms such as loan applications or insurance claims. The templates define the data to be extracted from the forms by Enhanced Form OCR. **See also:** *Enhanced Form OCR.*

Glossary	
Term	**Explanation**
form OCR	Process in which the Exigen Workflow system performs optical character recognition in forms, extracts text information, and populates the database with data from defined form zones. **See also:** *form, optical character recognition*.
Form OCR QA	Workflow object that verifies and corrects data extracted from forms during the form OCR process. **See also:** *form, form OCR*.
Form OCR Server	Automatic workflow object that extracts OCR data from incoming documents based on predefined form templates. **See also:** *form, form OCR*.
form overlay	Presentation form to display ERM reports. **See also:** *Enterprise Report Management*.
FTS	See *full text search*.
FTS Maintenance Utility	Application that configures FTS settings in projects. It defines stopwords and the algorithm for splitting extracted text into words, and detects documents that are not correctly processed. **See also:** *FTS Preprocessor, full text search, stopword.*
FTS Preprocessor	Automatic workflow object that extracts text from each page of every document sent through the workflow. It performs OCR on images, and uses other methods for other file formats, including DOC, PPT, XLS, and PDF. Custom Conversion Engine plugins can be developed for specific formats. Document search and retrieval can be performed based on the document text. **See also:** *FTS Server, full text search, optical character recognition*.
FTS Server	Automatic workflow object that works with FTS Preprocessor and creates an index used for full text searches.
full text search	Functionality used to retrieve documents based on words or phrases in the document text. **See also:** *FTS Preprocessor, FTS Server*.
G	
Genesys authentication	Authentication mode that allows Genesys users who are logged on to a Genesys desktop application to access the Exigen Workflow system without additional Exigen Workflow authentication.
global group	In the role based security scheme, groups that are used together with document context security levels to restrict the actions that specific users can perform with image editing tools in Image Viewer. In the ACL based security scheme, global groups are used together with permissions and privileges to restrict actions that specific users can perform with individual workflow resources. Global groups are also used to synchronize users with groups of external user systems. **See also:** *ACL based security, document context security level, Image Viewer, permission, privilege, role based security*, *synchronization*.
H	

Glossary	
Term	**Explanation**
handlers	See *Exigen Workflow handlers.*
High Volume Index	Workflow object to manually index workflow documents. **See also:** *indexing*.
High Volume Scan	Workflow object that scans paper documents into the Exigen Workflow system as electronic images. **See also:** *document image, scanning*.
hold status	Status for parcels that must wait until the hold time is over. These parcels become active after the hold time expires. **See also:** *hold time, parcel*.
hold time	Period during which parcels assigned to be processed are held prior to processing. **See also:** *hold status, parcel*.
I	
Image Enhancement Server	Automatic workflow object that improves document image quality. **See also:** *document image*.
Image Viewer	Application for viewing and annotating document images. **See also:** *annotation, document image*.
Import Server	Automatic workflow object that imports external documents and faxed images into the Exigen Workflow system without scanning. Import Server can also import index information and convert different file formats into DMS by printing the document through a virtual printer. **See also:** *DMS, scanning*.
imprint	Electronic marking that can be automatically added to each page of a scanned document image. An imprint can include information such as the Exigen Workflow project name and the current user's name.
indexing	Process of assigning documents to folders, subfolders, and document types so that the documents can be identified, classified, and retrieved by users based on assigned index values. **See also:** *document, document type, folder, subfolder*.
Inspect	Workflow object that verifies if document images and indexing information meet quality standards.
Integrated Security Management Console	Web-based application that administers Exigen Security Services policies for Exigen applications in directory services.
Interactive Document Capture	Application that captures documents from external applications, indexes the documents, converts the documents if required, and submits them to the appropriate location in Exigen Workflow as designated by the user. **See also:** *Interactive Document Capture Desktop, Interactive Document Capture Server.*
Interactive Document Capture Desktop	Client application that captures external files, indexes them, and sends them to Interactive Document Capture Server. **See also:** *Interactive Document Capture, Interactive Document Capture Server.*

Glossary	
Term	**Explanation**
Interactive Document Capture Server	Set of components that are run in the Automatic Queue Server environment to automatically perform tasks such as the following: • receive files prepared by Capture Desktop or another application • convert files to another file format • split files • import files into Exigen Workflow projects • send emails **See also:** *Interactive Document Capture, Interactive Document Capture Desktop.*
interaction script	Series of prompts that guide a user through a task. Interaction scripts are created using Exigen Interaction Script Builder.
L	
link	Connection between two nodes on a workflow map. **See also:** *node, workflow map*.
Low Volume Scan	Workflow object that combines the functionality of the High Volume Scan and High Volume Index nodes. Low Volume Scan also is used to retrieve documents from optical storage or an image server. **See also:** *High Volume Index, High Volume Scan, image server, indexing, scanning*.
N	
node	Element on a workflow map that represents a step in the document processing life cycle. Each node is associated with a particular business task that can be performed with documents. **See also:** *workflow map*.
O	
OCR	See *optical character recognition*.
optical character recognition	Text recognition in a document image. **See also:** *Enhanced Form OCR, form OCR, full text search*.
Orphan Utility	Application used to identify discrepancies between information in the database and in file storage.
output group	In Exigen E-Capture, a group of fields that contain text to be captured.
overlay	Predefined image added to a document image for presentation purposes. For example, the overlay image can include the company logo or headings.
P	
page	Image of a physical document page.
parallel parcel	Parcel sent to more than one node and user. **See also:** *node, parcel*.
parcel	Package of one or more documents transferred through the workflow.
pending parcel	Current parcel that is placed on hold, awaiting a required document.

Glossary	
Term	**Explanation**
permission	Element in the ACL based security scheme that defines a generic level of access to a workflow resource type. Permissions are combined with global user groups and privileges to define ACL security entries. **See also:** *ACL based security, ACL security entry, global group, privilege*.
policy type	In E-Capture, a group of form categories. For example, a policy type named Payments contains the following form categories: • Invoices • Receipts • Account Statements
Print Monitor	Application for managing print jobs in all registered print devices in Print Server. **See also:** *Print Server*.
Print Server	Application that schedules print jobs on registered printers to improve printing efficiency in Exigen Workflow. **See also:** *Print Monitor*.
privilege	Element in the ACL based security scheme. Users assign privileges to individual workflow resources to define which actions can be performed by which users. **See also:** *ACL based security, entitlement, permission, global group, resource*.
processflow	In Task Oriented Workflow, a type of taskflow that describes a high level business process and controls its execution. **See also:** *Task Oriented Workflow.*
Process Monitor	Application for viewing and managing user connections to workflow objects in the Exigen Workflow system. System administrators can see who is logged onto which workflow object. Process Monitor is also used to unlock workstations that are improperly or incompletely logged out of a specific node.
project	Business process data scheme that contains a collection of database tables and settings that define how documents are processed in all workflows that belong to the project. **See also:** *workflow*, *Project Builder.*
project table	Default or custom table associated with an Exigen Workflow project.
Project Builder	Application for creating and configuring projects. **See also:** *project*.
Publisher	Set of applications used to create, export, and view document collections outside the Exigen Workflow system. **See also:** *Publisher Cabinet, Publisher Collector, Publisher Packager*.
Publisher Cabinet	Application to view document collections that are exported from the Exigen Workflow system. Publisher Cabinet is run separately from Exigen Workflow and does not require a connection to the database. **See also:** *Publisher*.
Publisher Collector	Application to collect documents from Exigen Workflow into a document package that can be distributed outside the Exigen Workflow system. **See also:** *Publisher*.

Glossary	
Term	**Explanation**
Publisher Packager Utility	Application to distribute document collections outside the Exigen Workflow system. **See also:** *Publisher*.
Push Server	Automatic workflow object that sends documents to the next node and user according to defined routing rules. **See also:** *node, routing rules*.
Q	
queue	See *node*.
Queue	Workflow object that uses external applications for document processing. Queues are also used for implementing custom business logic in a workflow.
Queue Server Console	Application that performs tasks such as creating, starting, and stopping Automatic Queue Server jobs. **See also:** *Automatic Queue Server*.
R	
recycling bin	Logical container of Exigen Workflow documents that are marked for deletion. Documents are physically removed from the database and document storage systems only when Retention Server deletes them from the recycling bin. **See also:** *Retention Server*.
reference document	Document that exists only as a reference to another document.
regular user	Person who uses the Exigen Workflow system for daily business tasks. A user is authenticated by a user name and password. **See also:** *authentication*.
Remote Storage Server	Application that accesses and manages Exigen Workflow documents at a remote location.
rendezvous parcel	Parcel waiting to be reunited with its respective parallel parcels in a specific rendezvous node. **See also:** *node, parcel*.
report	Document processed by Enterprise Report Management objects. **See also:** *Enterprise Report Management*.
Report Definition Wizard	Application that creates templates to extract data from reports in ERM objects. **See also:** *Enterprise Report Management.*
Report Queue Monitor	See *ERM Report Queue Monitor.*
report template	Data presentation layer used by the ERM Indexer and ERM Storage Maintenance objects to index ERM reports, and by the Queue object to retrieve and view ERM reports. **See also:** *Enterprise Report Management, Queue.*
resource	In ACL based security, a workflow resource such as a document, folder, or subfolder.
Retention Server	Automatic workflow object that manages the disposal of outdated documents and other documents that are marked for deletion. **See also:** *recycling bin*.

Glossary	
Term	**Explanation**
Retrieve	Workflow object that performs a search for project documents, subfolders, and folders based on index values or a full text search. **See also:** *document, folder, indexing, subfolder*.
role based security	Exigen Workflow security scheme in which access to workflow objects is restricted by security levels, and access to individual folders and subfolders is restricted by folder and subfolder security groups. **See also:** *folder and subfolder security group, security level*.
routing rules	Rules that define which documents can be sent to which nodes based on document index values. Routing rules are associated with workflow links. **See also:** *link*.
RSS	See *Remote Storage Server*.
S	
scanning	Process of capturing physical documents as document images to import into the Exigen Workflow system. **See also:** *High Volume Scan, Low Volume Scan*.
security entry	See *access control entry.*
security level	Security element that defines what actions users can perform in each workflow object. Each user is assigned a security level.
single login	See *CCID Win32 authentication*.
single sign-on	See *CCID Win32 authentication*.
skill	Rules that allow managers to evaluate if specific user abilities are required to process parcels. Skill rule definitions are based on parcels, and they are different for each project.
stamp	Rubber stamp image that users can add to document images. **See also:** *Stamp Management Utility*.
Stamp Management Utility	Application that manages stamp images. **See also:** *stamp*.
Statistics	Application that monitors statistical information on user actions and processed documents.
stopword	Word that is ignored when building a full text search index. **See also:** *full text search*.
subfolder	Level in the document indexing hierarchy. In Exigen Workflow, subfolders contain documents and are usually assigned to folders. Users can retrieve documents based on assigned subfolder field values. **See also:** *document, folder, indexing*.
synchronization	Process of synchronizing Exigen Workflow users with external user systems, such as Windows domains. The status of synchronized users is automatically updated according to the situation in the external environment. Synchronizing can also be used to automatically update a user association with global groups.
T	

Glossary	
Term	**Explanation**
task	In an Exigen Workflow object, an external application, such as Word, that is used to process Exigen Workflow documents. In Task Oriented Workflow, a task is a custom business function associated with a parcel. A task must be completed as part of the document processing procedure. **See also:** *Task Oriented Workflow*.
task list	In Task Oriented Workflow, a list of business functions that must be completed before the associated parcel can travel further in the workflow. **See also:** *task, Task Oriented Workflow*.
task object	See *task*.
Task Oriented Workflow	Exigen Workflow based solution that automates business activities using an electronic task list on the user's desktop. **See also:** *task, task list, taskflow*, *Taskflow Server.*
Taskflow Server	Workflow object that processes tasks and automatically sends parcels to the next workflow node when all required tasks are completed in taskflow nodes. **See also:** *Task Oriented Workflow.*
Task Oriented Workflow Engine	Handler that performs automatic operations on parcels in queues and marks the parcels as processed. Task Oriented Workflow Engine contains a script that replaces Taskflow Server with an Automatic Queue Server job. **See also:** *Exigen Workflow handlers.*
taskflow	In Task Oriented Workflow, a sequence of tasks in a business transaction represented as a workflow map. **See also:** *Task Oriented Workflow*.
Template Management Utility	Application to create and maintain form templates for form overlays, optical character recognition, Enhanced Form OCR, and document attachments. **See also:** *Enhanced Form OCR, form OCR, optical character recognition, overlay*.
tile	Smaller image of the document page used for navigation purposes in Image Viewer. **See also:** *Image Viewer*.
Transfer Utility	Application to transfer the document image file location from one storage location to another.
U	
unique index	Combination of fields that define an index for a specific Exigen Workflow table. **See also:** *cluster index.*
Usage Logging Server	Service that provides information on the number of instances of Exigen Workflow applications running on a given day.
user	Exigen Workflow user. **See also:** *common user, regular user*.
Users Synchronization Setup	Application that configures Active Directory Synchronization Service and sets up log levels, security levels, timeouts, default passwords, and notifications. **See also:** *Active Directory Synchronization Service.*

Glossary	
Term	**Explanation**
V	
versioning	See *document versioning*.
W	
Win32 authentication	Authentication mode that requires users to enter the login and password of an existing Windows account to access the Exigen Workflow system. This authentication mode is available only in Exigen Workflow Web.
work item	Parcel being processed in a workflow.
Work Item Submitter	Workflow object that performs all Retrieve object functions and can create a parcel of referenced documents that is forwarded in the workflow. **See also:** *Retrieve*.
workflow	Design of a document flow in a business organization. A workflow consists of nodes and links. **See also:** *link, node, workflow map*.
workflow authentication	Authentication mode that requires users to enter the login and password of an existing Exigen Workflow account to access the Exigen Workflow system.
Workflow Builder	Application that builds and manages workflows and configures node settings. **See also:** *workflow*.
workflow group	Set of users used to limit access to workflow nodes. Workflow nodes are associated with specific workflow groups to define which users can access which workflow nodes.
workflow link	See *link*.
workflow map	Graphical representation of a workflow. **See also:** *workflow*.
Workflow Monitor	Application to monitor and manage processes in workflows.
workflow object	Exigen Workflow application associated with a specific workflow node. **See also:** *node*.
Workflow Simulator	Mode used to test a workflow and log in to multiple queues as multiple users.
workflow submap	Workflow within the main workflow represented by a single icon. Submaps are used in cases when workflows are particularly complex. **See also:** *workflow*.
Workflow Viewer	Application used to view workflow maps in read-only mode. **See also:** *workflow map*.

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