

# Infothek<sup>®</sup> Docudex

Version 10

Document Archiving / Imaging Database

## User Guide

Please print this manual for easy reference

May 12, 2005

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Important: Make sure that you backup the database and image files regularly and that you keep the backup files in a different and safe location.

## Getting Started

### Installation

If you downloaded the software from the Internet, locate and run the self-extracting docu100s.exe file.

If you are installing from a CD, insert the CD, open the Infothek Docudex folder and run the setup.exe or setup.exe file. Follow the prompts.

If you are installing the program on Windows 95/98/Me, please read section on MDAC below.

After the installation, restart Windows.

It is imperative that you spend a few moments going over the **Tutorial** included in this document.

### MDAC (Microsoft Database Access Connectivity) and JET Engine 4.0

Infothek Docudex requires the MDAC and JET Engine 4.0 files. If you get an error message when opening a database, you may be missing the MDAC and/or JET Engine 4.0 files. Both are free downloads from the Microsoft web site.

If your computer runs Windows XP or if you have Microsoft Access installed, then you already have the MDAC and JET Engine files. If your computer runs on the Windows 95, 98 or ME platform, you may not have these files. To download go to <http://msdn.microsoft.com/data/downloads/default.aspx> and download the lowest available version of MDAC. If you download MDAC 2.8 then you must also download the JET Engine 4.0 (since MDAC 2.8 no longer includes the JET engine 4.0).

### Tutorial

It is imperative that you spend a few moments going over the **Tutorial** included in this document.

### Graphics Formats

The basic version of the program includes the filter files for **TIFF, BMP and JPEG formats** only.

The following additional file formats are supported if you download the appropriate graphics filters from [www.informatik.com/infothek.html](http://www.informatik.com/infothek.html):

TIFF  
JPEG  
BMP  
PCX  
PNG  
GIF

## **Database**

Please also read the Database section below.

The program support MS Access (JET) and most ODBC compliant databases. MS Access 2000 databases can be created with your MS-Access software. If you do not have MS-Access, you can create the database with the **DB90.exe Database Maker**. You will find this utility in the Infothek Docudex folder (probably in the C:\Program Files\Informatik Inc\Docudex folder). You do not need a MS Access license to run Infothek Docudex. For a quick the evaluation of the program you can use the 'dummy' PLAYDB database included in program's folder. Please note that the PlayDB is 'oversimplified' with only four index fields; your real database can have up to 30 index fields.

Finally, we cannot stress enough that this program is a comprehensive document imaging system with many functions and features, and you probably will need assistance. If you have any questions or suggestions, please do not hesitate to ask for support. Not all functions and shortcuts are fully covered in this user documentation.

If you run the program on Windows 95/98/ME, make sure that you have the MDAC and JET engine 4.0 installed.

This section is just an introduction to the database; see more information in the Database section below.

## **Scanning Documents**

Please read section on scanning below.

Infothek Docudex includes a basic scanning module (Scanning – Limited from File menu). For volume scanning you are advised to use a more powerful and versatile Infothek Scan software. If you are using Docudex version 10.20 or higher the trial version of the Infothek Scan is included and can be run from the File menu (Scanning – Complete). If you are using an older version, the Infothek Scan can be downloaded. Please contact Support. Please note that Infothek Scan is not integrated; it is a separate program with its own User Guide, and a separate license is required, except for site licenses. With Infothek Scan you scan all your documents first, then you open Infothek Docudex and create the index for the scanned documents.

## **Licensing**

Please read the README.TXT file.

## **Warranties, Disclaimer**

Before you use this software please read important disclaimer information in the README.TXT file. This program is supplied AS IS without any warranties or liability.

## **To obtain technical support**

Please go online to [www.informatik.com/support.html](http://www.informatik.com/support.html) for contact information.

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## Tutorial, Walk-thru

When you first read this tutorial you probably have not created an index database and have not scanned in any documents. No problem. The downloaded software includes a few sample TIFF files and a dummy PLAYDB database. Please note that the Playdb is 'oversimplified' with only four index fields; your real database can have up to 30 index fields.

(To create your own database, use MS Access or use the db90.exe database creation tool. Infothek Docudex is also compatible with virtually all ODBC databases.)

- Start up Infothek Docudex. Initially, Docudex should start up with the 'play database' (playdb.mdb). If the 'Select Database' window appears, select the PlayDB database yourself. You will find the PlayDB database in the same folder as the Infothek Docudex program files, probably in C:\Program Files\Informatik Inc\Docudex.
- (Alternatively, from the File menu, select Database Selection.)
- In the Database Selection window, inside the MS Access Databases frame, click on the Database Selection button and specify the drive and the directory (folder) where you have installed Infothek (probably in C:\Program Files\Informatik Inc\Docudex). Note that the Playdb is over-simplified; the real databases can have up to 30 fields.
- From the Database list, select PLAYDB.MDB.
- From the Table list, select PlayTable (it may already be selected).
- Click on OK button.
- Click on the Open Images button (camera, first button in the toolbar).
- Select the Infothek Docudex directory (folder), for this test probable the C:\Program Files\Informatik Inc\Docudex folder.
- In the File Types list, select TIFF Files. You now see the Sample Tiff files listed.
- Select the Sample1.tif file and click on the OK button.
- The Sample1.tif file is displayed.
- We will now index the image. Click on the Indexing button (pencil, second button in the toolbar).
- The Indexing window is displayed with the file name already defaulted. The indexing window is displayed in the upper-right corner of the screen. You should not move it; otherwise it may cover up error messages and the system might appear 'frozen'. If that happens, press the 'Enter' key.

- Type a number in the Account Number field (this field is assigned a numeric data type, so it must be a number). Type *Miller John* in the Customer Name field, and enter some valid date in the Date field. There are many shortcuts for the indexing process, and you can make the process virtually automatic. Later, please review the Indexing section in this user guide.
- Click on the Checkmark/Plus button in the Indexing window (the button with the checkmark AND the plus symbol). This updates the database and opens the next image.
- The next image is displayed. If the Indexing window is not already displayed, click on the Indexing button (pencil). Click on the Indexing window if it does not already have the focus.
- In the Indexing window, enter some different data. Make the Customer Name field *Millhouse Robert*.
- Click on the Checkmark/Plus button again. The database is updated and the next image is displayed.
- Click on the Indexing button (pencil) again, or simply click on the Indexing window so that it get the focus, and fill in the indexing information in the Indexing window. Enter some text.
- Click on the Checkmark/Plus button for updating.
- Next we will do a Query. (You can close the Indexing window by clicking on the x-button in the upper right corner of the Indexing window.)
- Click on the Query button (2 question marks, third button in the toolbar).
- The Query, Search window is displayed.
- From the first Search Field list, select 'Customer'.
- From the Search Operator list, select STARTS WITH.
- In the Filter field, type *Mill* (i.e. the first four characters of *Millhouse*).
- Click on the Execute Search button in the Query window (green spot).
- The system found all records that match the query, i.e. *Miller* and *Millhouse*.
- Double-click on the *Miller* record. (Alternatively you can display the images as thumbnails, then view the full image by clicking on the thumbnail. The thumbnails display can be selected from Image List in the File menu.)
- The *Miller* image file is displayed.

\*\*\* END OF TUTORIAL \*\*\*

This tutorial covers a very tiny portion of the program's capabilities. You now should go through each of the online help topics. The program is very comprehensive. Special areas of interest are:

- Scanning
- Image List (thumbnails)
- Window panning
- Notes (annotations)
- Cropping
- Display sizes
- Zooming
- Multi-page handling
- Indexing shortcuts

.... and more

## Database

Infothek Docudex requires the MDAC and JET Engine 4.0 files. If you get an error message when opening a database, you may be missing the MDAC and/or JET Engine 4.0 files. Both are free downloads from the Microsoft web site.

If your computer runs Windows XP or if you have Microsoft Access installed, then you already have the MDAC and JET Engine files. If your computer runs on the Windows 95, 98 or ME platform, you may not have these files. To download go to <http://msdn.microsoft.com/data/downloads/default.aspx> and download the lowest available version of MDAC. If you download MDAC 2.8 then you must also download the JET Engine 4.0 (since MDAC 2.8 no longer includes the JET engine 4.0).

The program requires a database for the indexing of images. Supported databases include Microsoft Access and most ODBC compatible databases. Included in the program files is a 'practice' database in the MS Access 2000 format, called Playdb. You should create your own database to suite your exact indexing requirement. A MS Access 2000 database can be created with either the MS Access software or, if you do not have the MS Access software you can create a simple MS Access compatible database with the db90.exe **database creation utility**. You will find this utility in the Infothek Docudex folder (probably in the C:\Program Files\Informatik\Docudex folder). You do not need the MS Access software license, although, if you plan do run complex database management functions, database restructuring, compaction, database repairs, etc. you will need the MS Access software. Please note that the Playdb is 'oversimplified' with only four index fields; your real **database can have up to 30 index fields**.

When creating the database structure bear in mind that one field (ideally the last field) must (should) be named **Imagefile**. This field must be sufficiently large to hold the pointer to the image file (full path name of the image file). Also, for efficient searching it is recommended that the searchable fields be **indexed fields**. Properly planned indexes will significantly improve the search performance. Carefully specify the data types of the database fields. For example Date fields should be designated as DATE data type. Ensure that the field size is adequate for all your data input. The database table can have up to 30 searchable index fields.

Also, it is highly recommended that you break the database into manageable sub-directories, each directory small enough so that the image files can fit on a CD should you decide later to transfer the image files from the hard drive to CDs. The sub-directories should have meaningful names, such as 2004Q1 for example for files of the first quarter of the year 2004.

For the purpose of system testing, the system includes an over-simplified database called PLAYDB.MDB. If the file is missing and you wish to obtain a new file you can download it from [www.informatik.com/infothek.html](http://www.informatik.com/infothek.html). Please note that the Playdb is rather 'oversimplified' with only four index fields; your real database can have up to 30 index fields.

You can add special edit options, such as:

- Default Entries (fixed text or the current date)
- Imports from other databases
- Abbreviations (for quick input)
- Compulsory Tag (to specify that the field must be entered)
- Format Mask (to verify a predetermined format)
- Match (entry must match one of the pre-defined strings)
- Skip Tag (to skip a field when pressing the tab key)
- Popup list for a selection of entries

The **Default** tag populates the field with a specific initial entry (can be the current date or fixed text). The **Abbreviation** tag activates a list of field-specific abbreviations. The abbreviation is looked up and invoked when you enter a space. The **Pattern** tag verifies that an entry matches a certain specified pattern. The **Match** tag verifies that an entry matches one of several listed values (numbers or words). If a **Compulsory** tag is specified, the record can only be posted if a field entry exists. A **Skip** tag causes the field to be skipped when you press the Tab or Enter keys. The **Popup** option displays a popup list of entries for selection.

For information and instructions on setting up these options, please read the Database Setup at the end of this user guide.

Once you have built a database structure, it can be selected from Database Selection in the File menu. Many users also create a UDL file. The UDL file is a Microsoft concept that simplifies the access to databases. Generally, a UDL file is needed for all ODBC databases and for MS Access databases that are protected by passwords. For more information about creating a UDL file see Universal Data Link File (.udl) section in the Database Setup section at the end of this user guide. Once selected in the Database Selection, the database name will be saved as the default database.

- From the File menu select Database Selection.
- The Database Selection window is opened.
- For MS Access databases and databases that have a UDL file click on the Select Database button, locate the database file (.mdb file or .udl file) and specify the Table. Databases that have been defined in Database Setup (see section below), including ODBC databases, must be selected from the 'Defined Databases' list. Defined Databases can also be easily selected from the Databases pull-down list in the main window.
- Click on the OK button.

When selecting a database and table, the system will look for the database field that contains the link to the image files, normally called IMAGEFILE. If the field is missing, or not readily known to the system, you are prompted to enter the appropriate field name. For simplicity it is suggested that you always use the name 'Imagefile' for the database field that contains the link to the image file.

If you need to make global changes to the entries in the Database, for example to change the driver or folder of the image file location, please use the Global Replace in the Index window (Edit menu).

The database is selected from 'Database Selection' in the File menu. Once selected, it becomes the default database. Click on the Database Selection button and locate the .UDL or .MDB file. If a database has been defined, it is be listed in the 'Defined Databases' pull-down list for quick selection, or select the database from the pull-down list in the main window. To define a database, open the database, then, select the Indexing window, and from the File menu, choose 'Database Setup'. For more information, please read the Database Setup section below.

Defined databases (only) are shown in the Database pull-down list on the main page and can be opened by clicking a listed database.

### **ODBC databases**

If you use an ODBC database (instead of the MS Access), you should create a UDL (Universal Database Link File). UDL files define the connection string needed to open the database. Please read the Universal Data Link file section in the Database Setup section below.

### **Record ID**

If your database includes an auto-incrementing Record ID you must specify a default entry of [Ex] for that field. See Database Setup section below. The [Ex] will cause the system to send a blank entry to the database, which will then insert the Record ID. Note that your database must be setup for the Record ID when the database is created with the database software, e.g. Microsoft Access; the simplified Database Creation utility has no option for the Record ID. Please read the Database Setup section below for instructions on how to specify default entries.

## Scanning, Acquisition

Infothek Docudex includes a basic scanning module (Scanning – Limited from File menu). For volume scanning you are advised to use a more powerful and versatile Infothek Scan software. If you are using Docudex version 10.20 or higher the trial version of the Infothek Scan is included and can be run from the File menu (Scanning – Complete). If you are using an older version, the Infothek Scan can be downloaded. Please contact Support. Please note that Infothek Scan is not integrated; it is a separate program with its own User Guide, and a separate license is required, except for site licenses. With Infothek Scan you scan all your documents first, then you open Infothek Docudex and create the index for the scanned documents.

This section covers only the scanning operations of the simple, integrated scanning functions of Infothek Docudex; for scanning with Infothek Scan (Scanning – Complete) please read the separate User Guide of Infothek Scan. Scanning with the simple, integrated scanning software is suitable for occasional or low-volume scanning; for large volume scanning you should always use Infothek Scan.

The scanning options are accessible from the File menu.

The scanning functions require a TWAIN-compliant scanner. Make sure that you have the latest TWAIN driver supplied by the scanner manufacturer.

It is suggested that you scan the documents into a sub-folder of the ultimate folder. The sub-folder should be called 'Pending'. When you later index, the file will automatically be moved up to the parent folder (i.e. the ultimate folder). So, when the Pending folder is empty you are assured that all documents have been indexed. See also section on Pending folder below.

If you scan with Infothek Scan, the current file name can be transferred (poked) to the Infothek Scan application by choosing the **Poke File Name to Scan** option in the File menu (Shift+F8).

### Scan (Single)

This option is for scanning a single sheet with a flatbed scanner.

- Power up your scanner.
- From the File menu of the image display window, select Scan (Single).
- The Twain interface is displayed.
- Specify the settings, like resolution, monochrome/color, size, etc.
- Confirm.

- It may take some time before the scanner device warms up.
- When the scan is finished, the image is displayed. Select **Save As (Page Only)** from the File menu. The Save As (Page) window is displayed. If you scanned and saved an image before, the previous file name is displayed in the Filename field, otherwise the Filename field will be blank. It is suggested that you use numeric file names, such as abc0001.tif or 123456.tif. If the file name includes a numeric element, the file name can be incremented with the Plus (+) button. If the file name shown in the Filename field is correct or if the field is blank, click on Save Page to save the image to a new file, or click on Append Page to append the file to an existing TIFF file. If you want to save to a file other than the file shown in the Filename field, select the 'Browse+Save Page' or 'Browse+Append' Page button instead. Be careful not to append to a file format that does not support multiple pages. Only TIFF files support multiple pages. Use with great care. If not used correctly, good files might be overwritten and lost. Always make sure that you have a good backup of all files that are being affected.

The image can be saved in various formats. Just give the file name the appropriate extension and the system will save it in the correct format. For example to save a file as a JPEG, give it a name with a .jpg extension, for example somefile.jpg. Other extensions are: tif, bmp, png, pcx, gif, etc.

If you save the file in the JPEG format, you should also specify the **JPEG Quality** (2-99). For color images a JPEG quality factor of 75 is recommended. For black and white images a quality factor of 40 is adequate.

## Scan (ADF Multi)

This option is for scanning with an Automatic Document Feeder (ADF) and creating a new multi-page TIFF file.

- Power up your scanner.
- Click on Scan (ADF-Multi) in the File menu.
- The Save As Dialog will be displayed. Select or specify a file name. If the file already exists, it will be overwritten. It is suggested that you use numeric file names, such as 12345678.tif or abc00001.tif. If the file name includes a number, the file name will be incremented automatically for the next scan. Press on OK button.
- The Twain interface is displayed.
- Specify the settings, like resolution, monochrome/color, size, etc
- Confirm
- Wait for the scanner device to warm up.

- After scanning the batch in the tray, the last page will be displayed. You can open the entire multi-page document by clicking on the Open Scanned File. Do not save the file again; it has already been saved.

Note that with ADF scanning the file is now already saved. Unlike the Scan (Single) option, Scan (ADF-Multi) prompts you to enter the file name before you scan.

## **Scan (ADF Multi) Append**

This option is similar to Scan (ADF-Multi), it scans all documents in the Automatic Document Feeder (ADF) and appends it to an existing TIFF file. If the specified file does not exist, it will create a new file. Make sure that you only append to file formats that support multiple pages. Only TIFF files support multiple pages. If you append to a file that does not support multiple pages, the file may be overwritten and lost.

## **Pending Folder**

It is suggested that you scan the documents into a sub-folder of the ultimate folder. The sub-folder must be called 'Pending'. When you index later, the file will automatically be moved up to the parent of the 'Pending' folder (i.e. the ultimate folder). For example, if the documents are scanned into the c:\doc123\Pending\ folder, when you confirm the index entry, the image files will be moved to the parent folder, i.e. to c:\doc123. The 'Pending' folder can have sub-folders. So, files in c:\archive\pending\invoices will be moved to the c:\archive folder. When the Pending folder is empty you are assured that all documents have been indexed.

## **Print Scanned Document**

The scanned document can be printed. Select the File menu and choose Print. If the print size is incorrect you need to change Print Scale in the Print window.

See also the Print section below.

## **Combine Files**

The Combine Files option (in the Files menu) provides an easy method of combining single-page TIFF files into one multi-page TIFF file. Open a single-page image file and select the Combine Files option from the File menu. In the displayed Combine Files window specify the destination folder and file name and click on the Save button. The displayed image will be appended to the specified destination file and the next image is displayed.

## View and Change Images

An image file can be opened from the File menu or, more likely, you will find and open an image file by way of a query.

Multipage TIFF files also show all pages in scrollable **thumbnails display**. The thumbnails can be closed (hidden) by clicking the checkbox at the top of the thumbnails display. To re-display the thumbnails (if you have removed them), choose Thumbnails from the View menu.

### Open an image file from the File menu

- From the file menu, choose Open Image File, or click on the Imaging button (camera). The Open File dialog is displayed.
- Select the drive, folder and file name. The image is displayed.
- To open the next sequential file in the folder, click on the Open – Next Image button (yellow file with red arrow). To go back, click on the Open - Prior Image button. Instead of clicking on the buttons you can select the equivalent functions from the File menu (with optional shortcut keys).
- If the image is a multi-page file, click on the thumbnail image of the page or use the page navigation buttons to view the pages. Please read the Multiple Page Image Files section below.

### Open an image via a Query

- Run a query. Please read the section on Query for instructions.
- The query will list all files that match the query criteria. Each row in the query table lists one file with selected detail.
- Select a row and double-click on any cell and the image file is displayed. The data in the cell that you clicked will become the header for the displayed image. Instead of double-clicking on the cell, you can select the cell and click on the Imaging button (camera).
- To open the next sequential file in the query table, click on the Open – Next Image (Query) button (blue magnifying glass with red arrow). To go back, click on the Open - Prior Image (Query) button. Instead of clicking on the buttons you can select the equivalent functions from the File menu (with optional shortcut keys).

If the database points to an invalid driver letter (for example if the image files are on a CD), specify the **Substitute Drive** from the File menu. The substitute drive (and network drives) can also be defaulted in Setup.

## **Open an image from the Indexing window**

You can also open an image while working in the Indexing window. Typically, you would first run a search in the Indexing window, then optionally, navigate to the desired record (with the Next and Prior arrow buttons in the Indexing window). To open the image file for the current record click on the View Image button (camera) in the Indexing window, or select the function from the File menu. To open the next sequential image file you must select the next record, then click on the View Image button again; do not use the navigation buttons in the general toolbar.

## **View Options**

### **Thumbnails**

See Multi-page Images section below.

### **Multiple Display**

When you open an image it is always displayed in the active image window. If you want to display the image in a new and separate window, select New Image Window from the File menu in the Image window before you select the new image. For viewing images from the query window you can opt for individual windows by checking the Automatic New Frame check box in Setup. Please also read the Setup section.

This option should not be used for multi-page files. If you have several windows open, you can arrange the windows with options from the Windows menu (Tile, Cascade). You can also clear and close all windows with the Clear Windows option in the Windows menu.

### **Pan Window (Panning)**

For very large images you can use panning to view a particular area of the image. When panning is active, the full image is represented in a miniature window. A small rectangle inside the miniature picture represents the area of the image that is displayed. With your mouse, move the small rectangle to the area that you wish to see.

For panning, the setting in the View menu must be Actual Size or Fit-to-Width.

The Pan Window can be turned off in the View menu.

## Sizing

The displayed image can be resized:

- Full Size
- Fit-to-Width
- Fit-in-Window
- Magnification Factor

Click on the **Full Size** button in the toolbar or select the option in the View menu. Actual Size displays the image in its natural state, adjusted for the zoom and magnification factor. You may need to use the horizontal and vertical scroll bars to see the entire image, or you can use the Window Panning function. The Magnification Factor is used to customize the size of the image. The selection Factor can be saved as a default setting in Setup.

Click on the **Fit-to-Width** button in the toolbar or select the option in the View menu. Fit-to-Width resizes the image so that the width fits the window. This option is most suitable and recommended for viewing letter-size and legal-size documents. You may need to use the vertical scroll bars to see the lower part of the image. The selection Factor can be saved as a default setting in Setup.

Click on the **Fit-in-Window** button in the toolbar or select the option in the View menu. Fit-in-Window resizes the image so that the entire image fits inside the window. This option is suitable for small images or if you have a large display screen. The selection Factor can be saved as a default setting in Setup.

The window size and state is set in the Setup. See Setup section.

## Magnification Factor

The Magnification Factor is used to customize the size of the image. The selection Factor can be saved as a default setting in Setup.

## Zooming

You can zoom in and zoom out with a click on the Zoom button (magnifying glass with plus and minus signs), or by choosing the zoom option from the View menu. Typically, the zoom increases the size by 25% but the zoom factor can be changed in the Setup.

## Zoom Area

You can also select a Zoom Area with a click on the Zoom Area button or from the View menu. After selecting the Zoom Area option, move the mouse while holding down the left mouse button and outline a rectangle, then release the mouse.

## Multi-page Images

The TIFF file formats support multi-page files (one file consisting of several pages). When you open a multi-page file, the **thumbnails** of the pages are displayed on the right-hand side of the screen. Click on a thumbnail to open the respective page. Several useful navigational buttons are also available in the Pages menu and sidebar. These buttons allow you to move to the first, next, prior and last page of the current file. To open a specific page, type a valid page number in the page number box (between the page navigation buttons in the toolbar), and press Enter. The page navigation functions are also available from the Pages menu. The number of pages in the multi-page TIFF file are shown in status bar at the bottom of the window.

If your TIFF files have a very large number of pages, in order to improve performance, you may want to limit the number of thumbnails. The default limit of thumbnails is 300. The number of thumbnails can be changed in Setup. If the number of thumbnails is set to zero, the thumbnail display is disabled.

The thumbnails can be closed (hidden) by clicking the checkbox at the top of the thumbnails display. To re-display the thumbnails (if you have removed them), choose Thumbnails from the View menu. To refresh the thumbnails, choose Thumbnails Refresh from the View menu.

You can also opt to rotate all pages of a multi-page file. From the Pages menu, select Perma-Rotate. For more information, read the View Image section.

The currently displayed image can be appended, inserted to another TIFF file or can replace a page of another TIFF file:

### Append Page:

- From the Pages menu, select 'Append this Page to'
- In the Dialog window, specify the file to which you want to append the currently displayed image. The file must be a TIFF file.
- Click on OK button.

### Insert Page:

- From the Pages menu, select 'Insert this Page to'
- In the Dialog window, specify the file in which you want to insert the currently displayed image. The file must be a TIFF file.
- Click on OK button.
- In the pop-up window, specify the page in front of which you want to insert the currently displayed image.
- Click on OK button.

## Replace Page:

- From the Pages menu, select 'Replace this Page from'
- In the Dialog window, specify the file in which you want to replace a page. The file must be a TIFF file.
- Click on OK button.
- In the pop-up window, specify the page which you want to replace with the currently displayed image.
- Click on OK button.

## Delete a Page

To delete a page, choose the **Delete Page** function from the Pages menu. After deleting a page, you should re-open the image file. Use the Delete function carefully, the delete action cannot be undone.

## Re-Arrange Pages

To re-arrange the sequence of pages, or to segregate pages from a multi-page file and create a new file, use the **Re-arrange Pages** option from the Pages menu. Pagination allows you to re-arrange and intermingle pages from three files. Before you use this function, familiarize yourself with its capabilities and limitations and make sure that you have a good backup of the files that are affected.

By default the current file is displayed in List A. To open other files, click on the **Open File** button, or select option from File menu.

**Select the pages** that you wish to relocate or delete. Click on a single page to select one page; to select a range of pages, click on first and last page of a range while holding down the SHIFT key; to select several pages (contiguous or non-contiguous), click on the pages while holding down the CTRL key.

To **move the highlighted pages**, press down the left mouse button on the yellow 'Drag' marker, drag the marker to the destination position, and release the mouse button. The location spot must be either between two existing pages, or in front of the first page, at the end of the last page, or anywhere on an unused list. When moving pages within the same list, only one page can be moved at one time.

The last dragging operation can be cancelled. The undo function is in the Edit menu.

Select the pages that you wish to **rotate**, one or several (see Select Pages section above). From the Pages menu, choose a Rotate function. Confirm.

Select the pages that you wish to **delete**, one or several (see Select Pages section above). From the Pages menu, choose Delete Selected Pages. Confirm. The Delete action cannot be undone. Note that the delete function does not remove the pages from the original file until you save the changes.

As you mouse moves over a page, the image is displayed magnified in the **viewer**. The viewer can be disabled in the View menu.

The above functions are reflected only in the thumbnail display lists. The actual file is changed only once you choose the option.

A click on **Save (All Pages)** button saves **all the pages** displayed in the list. Generally, if formats are supported, the pages are saved in their original compression and color depth. The Tag 270 values are preserved, but other special tags are generally lost.

Check the '**Append File**' if the pages are to be appended to an existing file.

The **Clear** functions (button or selection in Options menu) clears the screen, without saving the changes.

## **Indexing, Database Entries**

*A 17-inch or larger monitor is recommended for indexing. If you have a smaller monitor, to increase the viewing area, you should set the resolution of the monitor as high as possible.*

*The indexing window is displayed in the upper-right corner of the screen. You should not move it; otherwise it may cover up error messages and the system might appear 'frozen'. If that happens, press the 'Enter' key.*

**There are many shortcuts for the indexing process, and you can make the process virtually automatic. Please also review the Semi-Automated Indexing section below.**

Each image file should be indexed in the index database so that it can be located instantly by simply keying in known keywords.

It is generally suggested that you scan all the days' documents in a batch mode and only index after all documents are scanned. Please read the section on Scanning for more information.

The program has many features to make the indexing easier and faster. For example, an entry from the previous record can be repeated by simply pressing Function Key 3, or you can create master records that can be cloned with a single key press. If one of the fields is (for example) to show the document type, you may want to scan all documents of the same type into one special sub-folder and let the indexing default the field entry to the folder name. This and other shortcuts can be formulated in the Database Setup; see section below, or contact Informatik.

Before you can index, you need a valid database. If you have not access to an existing database or have not yet created a database, please read about it in the Database section. The Database section tells you how to structure the database and how to add various editing options.

Generally, you create one index record for each scanned document, but it need not be so; you can create several indexes for one document or you can have indexes without documents (un-attached index records).

The entered data is validated at three levels: Some basic validation (like validating that a number field has a valid number or a date field has a valid date) is done when you move to the next entry field. Additional verification is done at a field level for edit specifications that you have in Database Setup (see Database Setup section below). Finally, the database engine performs a final validation before the record is created or amended.

Here is a step-by-step procedure to index documents that have previously been scanned. If you wish to create un-attached records (not indexed to a scanned document), then simply by-pass the first several steps.

- Start up Infothek Docudex. If you are using a trial version, you will see the Licensing window; for now simply click on the Continue button. When Infothek starts up it will display a blank window that will later hold the document image. If you have not previously selected the database, select it from the File menu (Database Selection). Once selected, the database will be defaulted until changed.
- From the File menu, select Open Image File. From the Open File dialog box, select the image file that you wish to open and index (select drive, folder and file). Click on the OK button and the image will be displayed.
- You can navigate to the next or prior image file (alphabetical order) by clicking on the Open Next Image and Open Prior Image button in the toolbar (the buttons with the arrow and yellow file folder, not the buttons with the arrows and magnifying glasses). The same navigation functions are also available from the File menu with shortcut keys. If the image file is a multi-page file you can navigate thru the pages with the Pages button in the toolbar (the cluster of arrow buttons on the left side of the toolbar) or choose an option from the Pages menu. To move to a specific page of a multi-page file, just type in the page number in the small box next to the Pages buttons. For other viewing functions, such as zooming, rotation, etc. please read the Image Viewing section.
- To open the Indexing window, click on the Indexing button (pencil) or choose the Indexing option from the File menu. The Indexing window is displayed showing blank entry fields. If you have specified a default entry (see Database section), the default entry will appear in the field. The *Imagefile* field always shows the file path of the currently displayed image. If a record is already open you must click on the Clear button (clr) before you create a new record. Click on the Indexing window to refresh the data.
- In the Indexing window, enter the various fields. You can move to the next field by pressing either the Enter key or the Tab key. To repeat the entry from the previously record, press Function Key 3 (or choose the equivalent function from the Edit menu. If a certain field should always be skipped, you can specify so in Database Setup (see Database Setup section below).

If the entry fields are white the system is ready for a **NEW record**; if the field is gray, an existing record is displayed and you can edit (modify) that record. If the field is gray and you want to create a new record you must click on the Clear button (in the Indexing window) first.

There are several productivity options. In addition to the **Repeat** function (F3) you can create a **Template** (from Edit menu), then post the template into a new record (Ctrl + F3). If a field includes a numeric item, you can **increment** the number by 1 unit (Edit menu, or Ctrl+I). Finally, you can set up field-specific **abbreviations**, **default entries** and **pop-up lists** (see Database section).

To post the index to the database click on the confirm button (checkmark). To post the entry and immediately display the next image for indexing, click on the Confirm+Next button. Before the record is posted, the system will validate the entries. Certain entries are validated by the database. You can pre-validate the entries with specifications in Database Setup (see Database Setup section). If a certain field must have an entry, you can specify so with a Mandatory tag in Database Setup (see Database Setup section below).

After you have posted the record you should click on the **Clear** button (clr) to ready the window for the next record.

You can specify the field that should get the **initial focus in the Indexing window**. The field of the initial focus can be specified in the Database Setup. See Database Setup below.

If you have a large number of documents with the same layout, you can set up the system so that a specified section of the image is displayed, zoomed for easier reading. See DocType section immediately below.

## **DocType (Document Type)**

When navigating through image files while indexing, individually defined document types can open a specified rectangle of the image, zoomed in for easy reading. To set up and use the DocType, please follow this procedure:

1. Open an image file.
2. Click on the Zoom button (in toolbar) and enlarge the image and move the scrollbars so that you just see the rectangle that you need for reading the index information.
3. Open the Indexing window.
4. Select the DocType menu.
5. Select Set up New Document Type.
6. In the dialog box, type a meaningful, user-friendly name for the document type.
7. Click OK button.
8. Close the Indexing window and reopen it.

Once the document types are setup, simply select it from the DocType menu.

## **Editing, Search**

The Indexing window features a simple search function. Select the field that you wish to search and enter the search criteria (leading characters of the search text) and press the Search button. All matched records are displayed. If there is more than one record, navigate to the correct record with the navigation buttons (arrows). The records so displayed are open for editing. To edit a record, type the changes and click on the confirm button.

## **Restore**

The Restore function (File menu) restores to current record.

## **Delete**

To delete a record, run a search to find the record, then click on the Delete button or choose Delete Record from the File menu.

## **View Image**

If you wish to see the image associated with the open record, click on the Open Image File button (camera) in the Indexing window, or choose Open Image File (Current Record) from the File menu.

## **Import, Export**

The Import function imports a tab-delimited text file. The export function exports all the records of the database to a tab-delimited text file.

## **Validation**

For validation of entries, please read the Database section.

## **Pending Folder**

It is suggested that you scan the documents into a sub-folder of the ultimate folder. The sub-folder must be called 'Pending'. When you index later, the file will automatically be moved up to the parent of the 'Pending' folder (i.e. the ultimate folder). For example, if the documents are scanned into the c:\doc123\Pending\ folder, when you confirm the index entry, the image files will be moved to the parent folder, i.e. to c:\doc123. The 'Pending' folder can have sub-folders. So, files in c:\archive\pending\invoices will be

moved to the c:\archive folder. When the Pending folder is empty you are assured that all documents have been indexed.

## **Global Replace**

You can globally edit all database entries. This procedure is useful if you move files from the hard disk to CDs and want to change the database entries to reflect the move (instead of using the Substitute drive option). To globally edit index fields, use the following procedure (use with care, the global edit cannot be undone).

1. Ensure that you have a good back up of the database file.
2. Open the Indexing window.
3. In the Search Field pull-down list, specify the field that you wish to change, type in a search parameter to isolate the records that you wish to include (recordset) and click on the Search button. It does not matter if the recordset includes records that need not be changed.
4. From the Edit menu, choose Global Replace.
5. In the prompt, type in the 'replace from' and the 'replace to' strings, separated by a pipe character. For example, to replace the driver letter from C:\ to D:\ you would type in `c:\|d:\`. To replace a folder name you would type in (for example) `\firstfolder\|\secondfolder\`. Do not use spaces at the beginning or at the end of the string; these will be trimmed by the system.
6. Click on Yes. The system will show you how the first record would be edited. Click on Yes to confirm and proceed.

## **Semi-Automated Indexing**

Docudex includes many features that will simplify and automate the indexing process. If you use some or all of the features, the indexing task will be much alleviated. Below is a short summary of the features. For more information please also read the section on Database Setup in this user guide.

1. Place the scanned documents in a directory called 'Pending', or a subdirectory of the 'Pending' directory. A document indexed out of the Pending directory (or a sub-directory of a Pending directory) will automatically be moved to the parent directory of the Pending directory, and the image link in the for the database index is automatically adjusted. With this feature you always know which files have not yet been indexed. For more information please read the 'Pending' section in this user guide.

2. Press Function Key 3 (F3) to repeat the field entry from the previous confirmed posting. You can accomplish the same shortcut by using the [COPY] default in the Database Setup. For Database Setup see the Database Setup section in this user guide.
3. Press Shift+Ctrl+F3 to create a template, then press Ctrl+F3 to recall and post the template. This feature is useful if most fields have the same entries.
4. In Database Setup create a [DATE] default so that the system date is automatically entered. Or, use [FILE] to extract all or part of the file name, or [DIR], [DIR2] to extract the folder names. [PAGES] will default the entry to the number of pages in the multi-page TIFF file. For more information on these options, please see Database Setup below.
5. Infothek Docudex does not support Optical Character Recognition (OCR), but you may want to implement a separate OCR program that captures the necessary data into a separate database. The data can then be used as default entries when indexing. See also the Database Setup section in this user guide. Or, the OCR program can create a tab-delimited text file. The text file can then be imported into the Docudex database. The import function is available in the File menu of the Indexing window.

For many other settings, please see Database Setup below.

If you work with different databases, you can associate a **default directory** (for image files) to each database. The default directory for a database is specified in the Database Setup. See Database Setup section below.

You can also specify the field that should get the **initial focus in the Indexing window**. The field of the initial focus can be specified in the Database Setup. See Database Setup below.

## Query

The program has powerful yet easy-to-use query functions.

Click on the Search button in the toolbar (question marks), or choose Query from the File menu. The Query, Search window opens.

Most query criteria and specifications can be saved so that they become the default for the next query. To save the criteria and specifications, choose **Save Settings** from the File menu. The entries are saved by Table name. If you have several databases that use the same Table name, you should set up the databases as Defined Databases (see Database Setup below).

Specify any (up to three) Search Fields and Search Operators. In the Filter box (with the blinking insertion point), type in the search criteria. From the list box on your right, select all the fields that you want listed in the search report. Drag the cursor over the selected fields, or click on the selected fields while holding down the Ctrl key (to change the field

sequence, see the section below). If necessary change the Boolean value (And, Or) for the second and search field. Optionally, specify the Sort Order. The Search Operators are described more fully below.

The AND/OR operators are analyzed in the following sequence:  
(Field1 AND/OR Field2) AND/OR Field3

The search specifications can be saved as defaults. To save the specifications, choose Setup, Preferences | Save Setting from the File menu.

Click on the Query button (green spot) or press Function Key 8; the search will be executed. The matched items will be listed in the report below.

To view the image of a record, select the record and click on the Image button (camera), or press Function Key 12, or simply double-click on the record. You can double-click on any cell in the row. The cell name will be used in the caption of the displayed image. When in view mode, simply click on the Open – Next or Previous Image File button in the toolbar (magnifying glass with blue arrow), or select the same functions from the File menu.

To view the listed images as thumbnails, choose Image List (Thumbnails) from the File menu. To open the image in full size, simply click on the thumbnail.

To return to the image window(s) without choosing a file from the query table, choose the Windows menu and select the image window.

### **Examples:**

You want to search the database for the name 'Smith' in the Name Field and for a date in 2004 in the Date Field.

In the first Search Field, choose the Name field.

In the first Search Operator, choose STARTS WITH if the surname is at the beginning, otherwise choose INCLUDES).

In the Filter box, type Smith (or smith)

In the second Search Field, choose the Date field.

In the second Search Operator, choose IS BETWEEN.

In the Filter box, type 1/1/04,12/31/04 (note the comma between the two values)

If you wanted to search for Smith, but not for names starting with Smith, like Smithson, use the Search Operator IS EXACTLY, instead of STARTS WITH.

If you wanted to search for all persons with names of Madison, Bauer and Mock, you would use the Search Operator IS IN. In the Filter you would type the three names, separated by a comma.

Date values can be entered in most common formats, such as 11/15/98, Jan 15,1999, etc.

## **Search Operators:**

### IS EXACTLY

You must enter the exact and complete text that you are searching. This option is generally used only to search short and unique text items such as account numbers. Only exact matches will be located.

### STARTS WITH

This is the most versatile search operator. You need only to enter a few leading characters of the search test.

### INCLUDES

This operator allows you to search for a text string included in the text field. For example, you can search for 'John' in a name field that includes other information, such as Miller, John. Use this option sparingly; the search will be slow because the system cannot use the index and it must read each record to determine if the search criteria is met.

### IS LESS/EQUAL THAN

This operator must only be used for numeric or date fields.

### IS MORE/EQUAL THAN

This operator must only be used for numeric or date fields.

### IS BETWEEN

This operator must only be used for numeric or date fields. Place a comma between the two values.

### IS IN

This function allows you to search for alternate matches. For example, CA, OH, MI will display the records that are California, Ohio or Michigan. Only exact matches are located.

## **Sequence of listed files**

To change the sequence of the File List, click on the field that you wish to move, then press the Insert key (or press the right mouse button), then enter the new field position. For example, if you enter the number 5, the highlighted field will be moved to the fifth position.

## Options

To **delete a row** in the search table, select the row and press on the Delete key (keyboard) or select Hide Row from the File menu.

The text of the search table can be **printed** or **exported**. Individual, marked and all image files can be printed from the File menu. These options can be found in the file menu.

To **copy the graphics files** identified by the search to another folder, choose Copy Graphics Files in the file menu.

You can **trim the table** to a few selected (or un-selected) rows. To select a row, click on the first cell (first cell on the left of each row). When selected, a check-mark is displayed. To de-select the item, click on the first cell again. After you have selected the rows, choose Trim from the File menu. The menu options delete all rows that have not been marked, or depending on the option, keep all the rows that have been marked. This feature is helpful if you need to print the content of the search table, export the images or export the data.

## Other File Types

The system can be set so that non-graphics files listed in the query table, such as **PDF, RTF, DOC, TXT, etc. files** are displayed by the respective native applications. To enable these various file types, make an appropriate entry in Setup, Preferences.

This option is practical only if you have a large screen. The document's native application will open behind the document imaging program and you will need to press ALT+Tab to move the hidden window to the front. Alternatively, you should set the document imaging program to Normalized (not Maximized), so that you can position it on the screen in order to make place for the document's native window.

# Save Image

## To re-save an in image (same file name)

If you made some changes to the displayed image, such as rotation, inversion, despeckling, deskewing, addition of notes (annotations), etc. and you want to save an image to the **same file name and same page position** proceed as follows:

- Click on the Save button in the toolbar or select **Save** from the File menu.

## To save a file under a different name

To save an existing file under a different name:

- Open the image file.
- Choose Save As from File menu. Do not click on the Save button in the toolbar.

Whenever an image is open, you can save the current file name to the Windows Clipboard and retrieve it later when saving or appending another file. The '**Save File Name**' option is available in the Edit menu.

## To save the currently displayed image

- From the File menu, choose **Save As (Page Only)**. The Save As (Page) window is displayed.
- If the file name shown in the Filename field is numeric, the file name can be incremented with the Plus (+) button. If the file name shown in the Filename field is correct or if the field is blank, click on Save Page to save the image to a new file, or click on Append Page to append the file to an existing TIFF file. If you want to save to a file other than the file shown in the Filename field, select the 'Browse+Save Page' or 'Browse+Append' Page button instead. Be careful not to append to a file format that does not support multiple pages. Only TIFF files support multiple pages. Use with great care. If not used correctly, good files might be overwritten and lost. Always make sure that you have a good backup of all files that are being affected.

The image can be saved in various formats. Just give the file name the appropriate extension and the system will save it in the correct format. For example to save a file as a JPEG, give it a name with a .jpg extension, for example somefile.jpg. Other extensions are: tif, bmp, png, pcx, gif, etc.

If you save the file in the JPEG format, you should also specify the **JPEG Quality** (2-99). For color images a JPEG quality factor of 75 is recommended. For black and white images a quality factor of 40 is adequate.

Whenever an image is open, you can save the current file name to the Windows Clipboard and retrieve it later when saving or appending another file. The '**Save File Name**' option is available in the Edit menu.

For **Appending, Inserting, Replacing** pages of a multi-page Tiff file, see Multi-page Images section above.

The Save As dialog defaults to All Files (\*.\*). The default can be changed in the General Setup (accessible via File menu). In the File Pattern field enter the file type, for example \*.tif.

### Auto-Index

If you save to a new file or rename a file, the Indexing window will appear automatically after the file has been saved. If you prefer to change the default so that the Indexing window is not automatically displayed, check the Auto-Index box in the Setup, Preferences window.

### Auto-Delete of Source File

If the 'Delete source file after Save' box is checked, the original source file (the file that is currently displayed in the main window) will be deleted after the file has been saved. For security reason, this option is available only if the source file is a single-page file. The box must be checked for each Save operation.

### Convert File to PDF

The option with PDF attachment requires the TIFF2PDF Command line program (available as an option). For information about the TIFF2PDF option, please visit [www.informatik.com/tiff2pdf.html](http://www.informatik.com/tiff2pdf.html). If you download the Tiff2pdf executable, it must be placed in the folder of the Infothek Docudex program files.

## **Printing**

- Select and display the image.
- From the File menu, choose Print (standard or centered) or click on the Print button in the toolbar. The Print Image window appears.
- Choose OK.

### **Printing from the Search/Query Window**

After you have run a query you can print the listed image files (current file, marked files or all files) from the File menu in the Search/Query window.

### **Printing of Scanned Documents**

The scanned document (un-saved) can be printed. Select the File menu and choose Print.

### **Printing Multiple Images, Bulk Printing**

If you want to print several files, selected files from a folder or entire folders, you should use the PrintAll (Bulk Printing) in the File menu in the image window. To print the files listed in the query table, choose Print from the File menu in the query window.

### **Spooler Service**

By default, multi-page files are treated as one job (this is important for faxing). To print each page of a multi-page file as a separate print job, un-check 'Print Spooler' in the Bulk Printing window or make an entry in the private INI file (docu100.ini). See Setup and Preferences section below.

# Other Options

## Image Information

The Image Information in the View menu displays various information about the image, such as width, height, compression method, formats, etc., all useful information for the technically minded.

The following options are available in the Images menu:

## Add Notes

You can add notes to an image file (or page). The notes are saved in a tag (Tag 270) and do not change the bitmap of the image. If the Notes are enabled (in Setup), each time the image file is opened the notes are displayed in a yellow strip at the top of the image. To add a note, select the Add Notes from the Images menu or click on the Notes button in the toolbar. Simply type in the note, or edit existing text, then save the image. By default, the Notes option is disabled. You can enable/disable the option in Setup.

The Notes can be printed via the default Text Viewer. Choose Print Notes from File menu.

## Invert Image

The Invert function reverses the colors; black letters on a white background become white letters on a white background and vice versa.

## Rotation

There are four Rotation options available in the Image menu. The basic rotation options are also available from the toolbar. The user-defined rotation can be undone from the Image File.

- Rotate 90 degrees clockwise
- Rotate 180 degrees upside
- Rotate 90 degrees counter-clockwise
  - User-defined rotation.

If you select the Perma-Rotate option in the Pages menu, all the pages are rotated at the selected angle. When you open a new file, the Perma-Rotate is cancelled.

## **Crop**

With the crop function, a rectangle of the displayed image can be cropped and saved as a new file or printed. Select the Crop function from the Images menu, then while pressing the left mouse button, outline the area that you want to crop, then release the mouse button. The cropped image is displayed and can be saved or printed. After cropping you can restore the original image with the Reload Image File option in the File menu.

## **Auto-Trim**

Auto-Trim removes the white borders. The operation can be reversed with the Undo function.

## **White-out, Black-out**

The White-out function allows you to remove a selected rectangle; the Black-out function can cover up a selected rectangle. Select the white-out or black-out function from the Images menu, then outline the rectangle that you wish to white-out or black-out with the mouse while holding down the left mouse button. When you release the mouse button the selected rectangle will be changed. The action can be reversed with the Undo function. To cancel the white/black-out mode, double-click on the image or de-select the option from the Images menu.

The following options can be found in the Edit menu:

## **Copy / Paste Image**

The Copy/Paste functions are handled via the Windows clipboard. Thus you can copy and paste images to and from another application.

## **Perma-Rotate**

If you select the Perma-Rotate option in the Pages menu, all the pages are rotated at the selected angle. When you open a new file, the Perma-Rotate is cancelled.

## **Convert File to PDF**

The option with PDF attachment requires the TIFF2PDF Command line program (available as an option). For information about the TIFF2PDF option, please visit [www.informatik.com/tiff2pdf.html](http://www.informatik.com/tiff2pdf.html). If you download the Tiff2pdf executable, it must be placed in the folder of the Infothek Docudex program files.

## **E-mail**

The viewer can be linked to some E-mail programs. The email client must be specified in the Setup, Preferences. This option is limited and only works with some email clients.

There are two E-mail options:

- E-mail with the TIFF attachment
- E-mail with a PDF attachment

The option with PDF attachment requires the TIFF2PDF Command line program (available as an option). For information about the TIFF2PDF option, please visit [www.informatik.com/tiff2pdf.html](http://www.informatik.com/tiff2pdf.html). If you download the Tiff2pdf executable, it must be placed in the folder of the Infothek Docudex program files. The E-mail (PDF) option creates a temporary PDF file in your system's designated temporary folder.

Generally, when the E-mail option is invoked, the current file is pasted as an attachment. Some E-mail clients only show the attachment if the file name has no embedded spaces.

## **User Login (Program Access and Security)**

For information and instructions on the User Login (User Ids and passwords) please contact technical support.

## Setup and Preferences

To specify the system parameters and the preferences, choose the Setup, Preferences from the File menu. The Setup window is displayed.

After you change the settings, you may need to restart the program for the changes to take effect.

### Image Window – Width, Height

This field specifies the width and height of the image display window (inner window). If the value is between 11 and 100, the entry represents a percentage of the screen width/height. If more than 100 it represents the measurement in twips (1440 twips = 1 inch; 57 twips = 1 millimeter). If zero (0), the size of the image window is retained from the previous session or previous use. The default values are 0.

### Master Window - State

This field specifies the state of the master window (Maximized, Normalized).

### Initial Directory

This field specifies the default directory for the Open Image file dialog window, for example c:\images\

### ShellExecute

If you enter standard file extension names, Infothek Docudex will open these files with the associated native program when selected from the Query table. For example, if the ShellExecute entry includes a reference to 'pdf', and if the Query table (Imagefile cell) lists a file with a .pdf extension, the file will be opened with the default PDF viewer. This feature should be used for viewing only; it is not practical to index files other than TIFF files.

Example of an entry in the ShellExecute field:

```
doc pdf txt
```

### Email

The Email field specifies the path to the Email client (executable name). This option works only with some email clients.

## **Magnification Factor**

If you images are displayed at 'Actual Size' you can specify the magnification factor. A typical entry would be 33 for 300x300 resolution images, or 50 for 200x200 resolution images. The default entry is 100.

## **Substitution Drive**

The path substitution will substitute (by an equal number of characters) the leading characters of the path name. For example, if the Path Substitution is D:\ and the query shows an image name of c:\mydir\myimage.tif, the system will display the d:\mydir\myimage.tif file. This option is useful and essential if the index database points to images in the C:\ drive while the images are stored on a locally inserted CD. The substitution drive can also be changed for the current session from the Disk Drive Substitution in the Setup, Preferences in the File menu.

Optionally you can enter a network drive, such as \\xyznet. The network drive name will then replace the 2-digit drive letters. For example, a fixed file path of c:\somedir\somefile.tif can be changed with an entry of \\xyznet to \\xyznet\somedir\somefile.tif.

## **File Pattern**

The Open Image File and the Save As dialog windows only list the All Files (\*.\*) and the TIFF Files (\*.tif) as file type filters in the File Type list. You can add a special filter here. For example, if you can make an entry of \*.bmp to list bitmaps in the File Types list.

## **Zoom Factor**

This entry represents the zoom factor. The default is 25. When you click on the Zoom-in or Zoom-Out the image is increased or decreased by the Zoom Factor.

## **Maximum Thumbnails**

Enter the maximum number of thumbnails that Infothek Docudex should display. The default is 300. If you enter a value of 0, then thumbnails will not be displayed. If your TIFF files have a very large number of pages you should consider specifying a maximum.

## **Display – Size**

Images can be displayed in three sizes:

Fit Width (preferred mode, default)  
Size-to-Fit  
Full Size

When using Full Size, you should specify the Magnification Factor (see above).

## **Notes Color**

Select one of the available colors. The default is Yellow.

## **Open Query at Start-up**

If this selection is checked, Infothek Docudex will display the Query window upon start-up.

## **Automatic New Frame**

If this option is checked, images from the query table are opened in new image frames. If un-checked, images are displayed in the active window, replacing the currently displayed image.

## **Auto-Indexing**

If this selection is checked, the Indexing window will be displayed immediately after a scanning operation.

## **HKEY\_LOCAL\_MACHINE**

If this checkbox is checked (default), the Windows Registry entries for the Database Setup are machine-based, otherwise they are user-based.

## **Print Spooler**

To disable the print spooler for printing, make the following entry in the [Setup] section of the docu100.ini file. The INI file can be found with the Infothek Docudex program files (probably in the C:\Program Files\Informatik Inc\Docudex folder). This affects only the printing done in the general printing option. For Bulk Printing, un-check the Print Spooler checkbox in the Bulk Printing window.

[Setup]  
Spooler=0

# Database Setup

## General

The following options can be set up for each field of the database table:

- Popup list
- Default entry
- Abbreviations (for speed typing)
- Pattern and text matching
- Flag for mandatory entry
- Flag for skipping of field (when using Tab key)

You also must make entries in the database setup

- a) If you use passwords for database access, or
- b) If you use an ODBC database (in most cases in order to specify the connection string).

Proceed as follows to make the entries in the database setup:

1. Select the database (File | Database Selection. If you have created a UDL file for the database (highly recommended, see section below), open the database via the UDL file, otherwise open it via the MDB file. For ODBC databases see section below. If you have previously made entries to the database setup, select the database from the 'Defined Databases' section.
2. Open the Indexing window.
3. From the File menu of the Indexing window, choose Database Setup. You can also select the option from the Setup/Preferences from the File menu (only if an image is open).
4. For new databases, the system prompts you to give a short user-friendly name for the database. The name should be short, meaningful and unique.
5. In the Database Setup window, select the field and make the necessary entries. See paragraph below for more detail.
6. Click on OK Save button.
7. You must restart Docudex, then re-select the database from the Defined Databases (listed on the right side of the Database Selection window).

The Database Setup window is self-explanatory. Here are some helpful hints.

If a **Compulsory** tag is specified, the record can only be posted if a field entry exists.

A **Skip** tag causes the field to be skipped when you press the Tab or Enter keys.

The **Default** tag populates the field with a specific initial (over-writable) entry. The entry can be any string or one of the following keywords (keywords must be capital letters and must be encapsulated in square brackets):

### **[COPY]**

Automatically copies the previous entry.

### **[DATE]**

Enters the current date (the date when the record is created). For formatting and parsing options.

The date can be in any format. If you do not want the default short date format (for example 12/31/2006), then add your own formatting code, for example:

[DATE]yyyy:mm:dd	will format to 2006:12:31
[DATE]yyyymmdd	will format to 20061231
[DATE]yyymm	will format to 0612
[DATE]yyyy	will format to 2006

You can also use hh for hours, mm for minutes and ss for seconds.

For short month name (e.g. Feb), use mmm.

For full month name (e.g. February), use mmmm.

### **[FILE]**

Enters the base file name or parsed sections of the file name into the index field.

[FILE] followed by a number allows you to take a section of the file's base-name and post it to an index field. The syntax is as follows: A positive number will read a number of characters from the left; a negative number will take a number of characters from the right. For example -10 (minus 10) will post the last 10 characters of the file's base-name to an index field. The numbers 999 have a special meaning. A positive number 999 will read all characters of the base-name starting from the left until a space is encountered. A negative number 999 (-999) does the same but starting from the right (end) of the base-name.

If the file name has text strings separated by a specific separator character (for example an underscore), then you can copy a particular section. For example, if the file name is 'aaa-bbb-ccc.tif', an entry in Database Setup of **[FILE]-,2** will capture 'bbb' (the second section). Or, if the file name is 111~222~333.tif and the setup entry is **[FILE]~,3** the third section (333) will be captured.

### **[FILEDATE]**

[FILEDATE] 0 to make the default the creation date of the file.

[FILEDATE] 1 to make the default the 'last change' date of the file.

[FILEDATE] 2 to make the default the 'last access' date of the file.

Optionally, use the same formatting syntax as for [DATE] above, for example  
[FILEDATE] 0,mmyy

### **[DIR]**

Posts the folder name of the current file in the index field. This useful feature allows you to pre-sort documents. For example, scan all invoices into a folder called 'Inv' and let the system automatically post the word 'Invoice'; to an index field.

### **[DIR2]**

Posts the parent folder name of the current file in the index field.

### **[Pages]**

Posts the number of pages of the current file.

### **[DB]**

This option can be used to read data from another database. Index fields are populated automatically upon initialization. This function is ideal for importing data from an OCR-created database. For advanced use only. For instructions please see section below.

### **[DB2]**

This option can be used to read data from another database. Index fields are populated when the Import Data option is requested by the user. For instructions please see section below.

### **[TXT]**

This option can be used to import text from a text file (.txt) that has the same name as the image file (except the extension). For example, [TXT]2 will read the second line of the text file and copy it into the index field.

### **[EX]**

to specify the field as a **Record ID** field. This will cause the software to pass a blank to the database (instead of a zero) and will disable editing by Informatik Archiver for that field. The database can then insert the Record ID. Record ID fields need to be created with the MS Access software; please refer to the MS Access user guide.

The **Abbreviation** tag activates a list of field-specific abbreviations. When indexing, the abbreviation is triggered and invoked when you enter a space, i.e. when you enter the

abbreviation code (without the explanation mark) followed by pressing of the space bar. Enter both a short abbreviation code and the expanded abbreviation text. The abbreviation code typically is a 2-3 character text string. The list is limited to approximately 50 entries (total number of characters cannot exceed 1000).

The **Pattern** tag verifies that an entry matches a certain specified pattern, for example to ensure that the social security number corresponds to a particular format.

The single pattern is entered in the setup specification field with fixed characters and/or placeholders, for example:

```
###-##-####  
or  
(###) ###-####
```

The following character placeholders are supported:

# stands for one single numeric characters (0-9).  
? stands for one single character (alpha-numeric).  
\* stands for one, zero or several alpha-numeric characters.  
In addition, the pattern can include any fixed characters or spaces.

The **Match** tag verifies that an entry matches one of several listed values (numbers or words). For example, if the Match list has the following five entries, only field entries that exactly match one of these listed items are accepted:

Feet meters inches centimeters millimeters.

The list is limited to approximately 50 entries (total number of characters cannot exceed 1000).

The **Popup** displays a popup list of entries when a field gets the focus. The list is limited to approximately 50 entries (total number of characters cannot exceed 1000).

Instead of listing the popup items you can also refer to a text file (.txt), for example c:\somedir\mypopup.txt. To use the Text File method, click on the 'Select a Text File' button. The popup text file must list all items, one item per line, for example:

```
Budweiser  
St Pauli  
Urquell  
Kronenbourg  
Stroh  
...
```

### **Copy the Database Setup specifications to other PCs**

For special utilities that make the copying of the Database Setup to other computers easy, please contact Technical Support.

## **Rename or Delete the Database Setup**

The setup for a database can be deleted by pressing the 'Delete Setup' button in Database Setup. To change the short name of the database, delete it, then re-create it, or change it in the Windows Registry HKEY\_LOCAL\_MACHINE\ Software\Informatik Inc\Infothek (alternatively in the HKEY\_CURRENT\_USER\...). Proceed with care.

## **Passwords**

(This section refers to passwords for database access only. For login passwords (program access and security), please see Login section.)

Docudex version 7.21 and higher supports passwords for Access 2000 databases. (Passwords for ODBC databases have always been supported). The password for a database can be entered in the Connection String, but that is generally unsafe. Instead of specifying the password in the Connection String, add a Prompt placeholder in the Connection String, like

Password=[?Prompt:Enter the Password]  
(exact spelling and spacing is important!)

Databases with passwords must be created with MS Access software. The Docudex database creation tool does not support passwords.

To use Docudex with password-protected databases you must first change the Connection String in the Database Setup:

1. If you have not already done so, create the Database Setup (see above sections). Once the Database Setup has been done, the given short name of the database will appear in the 'Defined Databases' section in the 'Databases Selection' window (File | Databases Selection).
2. Open the database from the 'Defined Databases' section in 'Database Selection' (File | Database Selection).
3. Open the Indexing window.
4. From the File menu, select Database Setup.
5. Click on the pull-down list next to the Connection String field, and select the 'MS Access with Password', for example.
6. In the prompt enter the path to the MS Access database (.mdb file).
7. Make any other changes to the Connection String, as necessary.

### **Samples of Connection Strings using passwords:**

Connection=Provider = Microsoft.Jet.OLEDB.4.0;Data Source=c:\mydir\mydb.mdb;Jet OLEDB:Database Password=[?Prompt:Enter Password]

Connection=Provider = Microsoft.Jet.OLEDB.4.0;Data Source=c:\mydir\mydb.mdb;Jet OLEDB:Database Password=pshhxyz

For ODBC databases:

(please refer also to the ODBC's reference manual)

(For ODBC databases, whenever possible, use the Data Link File method to specify the Connection String; see section below. The Data Link File removes the complexity of the connection string.)

```
Connection=Provider = SQLOLEDB.1;Data Source=(local);User ID=sa;Initial  
Catalog=pubs; PWD=pshhxyz
```

```
Connection=Provider = SQLOLEDB.1;Data Source=(local);User ID=sa;Initial  
Catalog=pubs; PWD=[?Prompt:Password Please]
```

You can use the Prompt placeholder for User ID also, for example: UID=[?Prompt:Enter User Id]

Check your database reference manual for exact syntax of the connection string.

### **Use of [DB] and [DB2] default in Database Setup**

The purpose of the [DB] and [DB2] default options is to retrieve data from another database (Source Database) and to post it to the Infothek Docudex (Main Indexing Database).

[DB] and [DB2] both import data into the indexing window, but there are some major differences in their use.

#### **[DB]**

[DB] imports the records immediately and automatically when the indexing window is initialized. [DB] looks for a record in the Source database that matches the entry in the Imagefile field. The path of image files in the Source Database must thus match the image files that you are indexing in Main Indexing Database.

The Source Database is typically created by an OCR operation. The fields of the Source Database contain the values retrieved from the image file that need to be posted to the Main Indexing Database. One of the fields in the Source Database has the full path to the image file that is being indexed, and data from that Source Database is then imported into the indexing window.

#### **[DB2]**

[DB2] is a universal import tool. Any field in the indexing window (not just the Imagefile as in [DB]) can serve for the query of records in the Source Database. The [DB2] import is not automatic as it is in the [DB] option. You type the search value in any of the fields in the indexing window and you specifically request the import. All the fields specified in the setup are then populated by the values from the record found in the Source Database.

## Setup of [DB]

(see below for setup of [DB2])

The [DB] is made functional as follows:

1. If not already done so, in Database Setup (in File menu of the Indexing window) select the Main Indexing Database. Give the database a user-friendly name. From now on, you will open the database with that user-friendly name. All databases with user-friendly names are listed in the pull-down list in 'Defined Databases' in the Database Selection window.
2. In the Database Setup window, select the field that you like to set up. Each field needs to be set up separately.
3. In the Default section enter the following text string:
4. [ DB ]<sub>n</sub>, where n stands for the ordinal number of the field of the Source Database that contains the text to be defaulted. All 'n' values refer to the Source Database, not the Main Indexing Database. For example, [DB] 3 will retrieve the value of the third field in the Source Database of the record that matches the current image file and posts the value to the Indexing window.
5. Confirm the entry and optionally select other fields that you like to set up.
6. If not already done so, create an INI file called XXX.INI where XXX is the user-friendly name of the database defined in the Database Setup. For example if the user-friendly name of the database is MYDB then the INI file must be called MYDB.INI.

The entry in the INI file for [DB] must have 4 lines. The [DB] set of entries can co-exist with the entries of [DB2]. All entries in the INI file refer to the Source Database. Exact spelling is essential; a single misspelled string or name will invalidate the operation of [DB].

- The first line is a fixed **[Setup]** header.
- **Database=**  
The second line is the full path to the Source Database (or UDL file that represents the Source Database). The file must have an .MDB or an .UDL extension. No other files are accepted. If the database is not an MS Access database (JET database), then you must use a UDL file.
- **Table=**  
The third line is the name of the Table of the Source Database.
- **Imagefile=**  
The fourth line is the field name in the Source Database that contains the path to the image file.

Example of an INI file:

```
[Setup]
Database=c:\somedir\somedb.udl (or ...\somedb.mdb)
Table=ImageTable
Imagefile=Image
```

7. Place the INI file in the same directory as the archiver software (for example same file as the docu100.exe program. Check the file name of the INI file; make sure that it has an .ini extension (not ini.txt).
8. The setup is complete. Now when you initiate the indexing window the indexing fields will be populated automatically with data from the Source Database relating to the open image file.

The [DB] option is operational only if the database is selected from the list of 'Defined Databases' (in Database Selection).

### **Setup of [DB2]**

(see below for setup of [DB])

The [DB2] is made functional as follows:

1. If not already done so, in Database Setup (in File menu of the Indexing window) select the Main Indexing Database. Give the database a user-friendly name. From now on you will open the database with that user-friendly name. All databases with user-friendly names are listed in the pull-down list in 'Defined Databases' in the Database Selection window.
2. In the Database Setup window, select the field that you like to set up. Each field needs to be set up separately.
3. In the Default section enter the following text string:
4. [DB2 ]n, where n stands for the ordinal number of the field of the Source Database that contains the text to be defaulted. All 'n' values refer to the Source Database, not the Main Indexing Database. For example, [DB2] 3 will retrieve the value of the third field in the Source Database of the record that matches the import lookup and posts the value to the Indexing window.
5. Confirm the entry and optionally select other fields that you like to set up.
6. If not already done so, create an INI file called XXX.INI where XXX is the user-friendly name of the database defined in the Database Setup. For example if the user-friendly name of the database is MYDB then the INI file must be called MYDB.INI.

The entry in the INI file for [DB2] must have 4 lines, (plus two optional lines). The [DB2] set of entries can co-exist with the entries of [DB2]. All entries in the INI file refer to the Source Database. Exact spelling is essential; a single misspelled string or name will invalidate the operation of [DB2].

- The first line is a fixed **[Setup2]** header.
- **Database=**  
The second line is the full path to the Source Database (or UDL file that represents the Source Database). The file must have an .MDB or an .UDL extension. No other files are accepted. If the database is not an MS Access database (JET database), then you must use a UDL file.
- **Table=**  
The third line is the name of the Table of the Source Database.
- **Field=**  
The fourth line is the field name in the Source Database that is being searched for matching records.
- **MustSee=**  
An optional fifth line lists the ordinal numbers of the fields in the Source Database that must be displayed if multiple records are found, so that the user can determine which of the listed records to select for import.
- **Use=**  
An optional sixth line controls the display of the list of matched records and alert messages:
  - 1 = If only one matching record is found in the Source Database, the value(s) is/are defaulted into the indexing fields automatically without a further prompt.
  - 2 = No message is displayed if a matching record is not found.
  - 3 = Combination of options 1 and 2.
  - 0 = A list of matched records is always displayed, even if only one record matches. If no match is found a message will be displayed.

Example of an INI file:

```
[Setup2]
Database=c:\somedir\somedb.udl (or ...\somedb.mdb)
Table=Imagetable
Field=Image
MusSee-5,3
Use=3
```

If you use both [DB] and DB2] an sample INI file might be:

```
[Setup]
Database=c:\somedir\somedb.udl (or ...\somedb.mdb)
Table=ImageTable
Imagefile=Image
```

```
[Setup2]
Database=c:\somedir\somedb.udl (or ...\somedb.mdb)
Table=Imagetable
Field=Image
MusSee-5,3
```

7. Place the INI file in the same directory as the archiver software (for example same file as the docu100.exe program. Check the file name of the INI file; make sure that it has an .ini extension (not ini.txt).
8. The setup is completed. Now, simply type the value in the respective index field and choose Import Data from the Edit menu (or press F4) and the specified other index fields will be populated with data from the Source Database. If there are several matches, a list of matched records are displayed in a table, from which you can choose the correct record. If the search string is alpha-numeric, you can simply enter the leading characters followed by the '%' wildcard character, for example Steven% will retrieve all items starting with 'Steven', including Stevenson, Stevensen, Steven, etc. and the input field can be completed automatically.
9. Please review a sample application below.

The [DB2] option is operational only if the database is selected from the list of 'Defined Databases' (in Database Selection).

### **Sample application for [DB2]**

The Assumptions are:

The Main Index Database (c:\orders\orders2005.mdb) has the following fields:

Order Number  
Customer ID  
Customer Name  
Customer State

The Source Database (c:\customers\customers.mdb) has a table called 'Customers' with the following fields:

Customer Number  
Customer Since  
Customer Name  
City  
State  
Zip Code

The Customer ID in the Orders database and the Customer Number in the customer database are assumed to be related.

As we post new orders we want the Customer Name and Customer State to be imported into the Order Indexing window.

The Setup Procedure is:

We open the Orders2005 Database (for example c:\orders\orders2005.mdb). From the Files menu of the Indexing window, we choose Database Setup. We give the database the user-friendly name of **Orders**. In the Database Setup window we make the following entries:

We select the field 'Customer Name' from the pull-down list and in the Default field we type [**DB2**] **3** (this refers to the third field in the Source Database), and we confirm the entry.

We select the field 'Customer State' from the pull-down list and in the Default field we type [**DB2**] **5** (this refers to the fourth field in the Source Database), and we confirm the entry.

With Notepad, we create a text file with the following entries:

```
[Setup2]
Database= c:\customers\customers.mdb
Table=Customers
Field=Customer Number    (see *)
MustSee=3,4, 5           (see **)
Use=1                    (see ***)
```

- \* Customer Number is the field that links to the Main Indexing Database.
- \*\* On multiple matches we want to see the customer name, city and state.
- \*\*\* If there is a unique match, then the imported data should be inserted in the indexing window without a further prompt.

We give the created text file the name **orders.ini** (the name of the user-friendly database) and save it in the same folder as the archiver software (same folder as docu100.exe).

Setup is complete.

We restart the Order database. We must open it from the list of 'Defined Databases' in Database Selection.

Now, after we type a Customer ID in the Orders database we can choose Import Data from the Edit menu (or press F4) and the system will locate the customer information in the Customers database and extract the Customer Name and State and insert it into the specified fields in the indexing window.

By default, the Database Setup specifications are saved in the User's Windows Registry (**HKEY\_LOCAL\_MACHINE**). To save the settings in the **HKEY\_CURRENT\_USER**, so that they can be shared by all users, please change the default in Setup.

## ODBC Databases

ODBC databases require some special consideration. In many cases you can open the ODBC database via a UDL file (see section below).

If that is not possible, use this one-time setup procedure:

- a) Open the PlayDB (from File | Database Selection)
- b) Open the Indexing window, and from the File menu, choose Database Setup. When prompted for a Short Name, give it the name you want to use for the ODBC database.
- c) In the Database Setup window, make no entries but press the OK Save button. This will create a Windows Registry entry for the database.
- d) Open the Windows Registry HKEY\_LOCAL\_MACHINE Software\Informatik Inc\Infothek and click on the database (the associated short name).
- e) Edit the Connection String, Table and Imagefile values to correspond with your ODBC database.
- f) Close Docudex and re-open.
- g) From File menu, choose Select Database, and select the database from the 'Defined Databases' section.

## Universal Data Link File (.udl)

The UDL file is a Microsoft concept and makes connections with databases easy.

The Data Link File (Universal Data Link – UDL) provides a simple method for specifying database connection strings. The database connection command simply points to the UDL file which contains all information needed to open the database.

Data Link Files are created as follows (see also Windows reference manuals):

1. In Windows Explorer select the folder where you want to create the UDL file.
2. From File menu in the Windows Explorer, select New, then select Text Document.
3. Assign the new file a file name of your choice; it must have a .udl extension name. It is suggested that you save all the UDL files together in one folder, ideally in the same folder as the Docudex program files.
4. Right-click on the newly created and renamed file, and select Properties from the pull-down list.
5. Click on the Provider tab and select the appropriate provider (for example, for MS Access you would normally choose the Microsoft Jet 4.0 OLE DB Provider). Review your database reference manual for further instructions.
6. Click on Next button, or choose the Connection tab.
7. Select the database file (use the Browse button to find the database file)
8. Click on OK to confirm.

If you are creating a UDL file for an ODBC database, or for advanced MS Access use, you should also make certain entries in Database Setup (see Database Setup section below).

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