IBM EDMSuite ImagePlus VisualInfo

Client for Windows User's Guide

Version 2 Release 3

SC31-9052-01

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Note

Before using this document, read the general information under "Notices" on page vii.

Third Edition (September 1997)

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About this book

This book describes how to use the IBM ImagePlus VisualInfo Client for Windows to receive, classify, use, store, and view documents. The Client for Windows is a Windows-based user interface for the IBM ImagePlus VisualInfo solution. You can use the Client for Windows to do the following:

- Receive documents from a scanner or external files
- Index documents and place them in folders
- Search for specific documents and folders
- View documents
- Add comments or highlights to documents
- Export documents as external files
- Route documents and folders through a workflow

Who should use this book

Use this book if you are responsible for working with documents using the Client for Windows.

Although this book is written for the end user, if you are the system administrator for the Client for Windows, you can use this book to review the procedures users follow and to assist them in using the product effectively in your enterprise.

The Client for Windows application runs on the following versions of Windows:

- Windows 3.1 or higher
- Windows NT 4.0 or higher
- Windows 95

How this book Is organized

This book contains the following chapters:

- Chapter 1, “Introducing the Client for Windows” on page 1, gives an overview of the Client for Windows. It introduces the basic concepts, describes the capabilities of the system, and presents a sample implementation.
- Chapter 2, “Getting started” on page 7, describes how to log on and off the Client for Windows, introduces the Main Window, and describes how to get online help.
- Chapter 3, “Entering documents into the VisualInfo system” on page 21, describes how to scan and import documents into the Client for Windows, and how to export documents and folders.
- Chapter 4, “Using tables of contents” on page 29, describes how to work with the Table of Contents windows that list documents and folders. It describes how to use Tables of Contents to access documents and folders and how to control the appearance of Tables of Contents.

- Chapter 5, “Indexing documents and folders” on page 39, describes how to categorize documents and folders.
- Chapter 6, “Locating documents and folders” on page 43, describes how to search the fileroom for documents and folders.
- Chapter 7, “Workbaskets, folders, and workflows” on page 55, describes how to use workbaskets and folders. It also describes how to manage the items assigned to workflows.
- Chapter 8, “Viewing and annotating documents” on page 67, describes how to use the Client for Windows to display documents. It describes how to change the way documents are displayed and how to add notes, highlights, and other annotations to documents.
- Chapter 9, “Printing documents” on page 83, describes how to print documents and associated information. It describes how to set print preferences and printer options.

How to use this book

This user's guide complements the online help available with the Client for Windows. The book focuses on presenting a general description of various tasks and procedures. The online help provides detailed descriptions of the menu bar items, window fields, and client application tasks and procedures.

Help is available for all program windows and tasks. The type of help that appears in the window depends on what choice you are selecting or what task you are performing when you request help. For a detailed description of the online help facility, see “Getting help” on page 17.

If you are not familiar with the Microsoft Windows operating system, refer to the Windows online helps and tutorials.

Style conventions

To help you easily understand the text, this book uses the following conventions:

Convention	Stands for
Bold	Names of controls and push buttons in a window
Italic	• Terms defined for the first time in the book • Names of books or other publications • Information that you can specify in an entry field • Information that the program displays in an entry field

What's new in Version 2.3

IBM VisualInfo version 2.3 contains many enhancements, including new Windows NT library and object servers, a choice of System Administration programs, one for Windows NT and one for OS/2, and a simplified procedure for installing Windows components.

The main enhancements to the Client for Windows are documented in this user guide. They include the following:

- An improved document viewer that can display multiple documents at one time and is integrated with the Main Window. (See Chapter 8, “Viewing and annotating documents” on page 67.)
- A new menu structure: the Selected menu and the Process menu replace the Contents menu and the Document menu. (See “Main Window menus” on page 9.)
- Additional markup tools for annotating your documents with items such as circles, boxes, lines, and arrows, as well as notes and highlights. (See “Annotating documents” on page 72.)
- Advanced search capabilities, including the capability to search for criteria across index classes, to set complex conditions for searches, and to save and reuse pre-defined searches. (See “Advanced searches” on page 44.)
- The ability to print documents directly from a Table of Contents. Documents no longer need to be opened for you to print them. (See Chapter 9, “Printing documents” on page 83.)

Where to find more information

The entire VisualInfo library is available in HTML format on the VisualInfo Information CD-ROM and on the ImagePlus home page on the World Wide Web: **http://www.software.ibm.com/is/image**.

The printed publications included with each VisualInfo license are:

- *Planning and Installation Guide*, GC31-7772-03
- *System Administration Guide*, SC31-7774-03
- *Client for OS/2 User’s Guide*, SC31-7775-01
- *Client for Windows User’s Guide*, SC31-9052-01
- *License Information*, GC31-7773-03

The remaining books in the library are available in HTML format only. Use your VisualInfo Information CD-ROM and your favorite Web browser to access these books.

- *Application Programming Guide for OS/2*
- *Application Programming Guide for Windows*
- *Application Programming Guide for AIX*

- *Application Programming Guide for MVS*
- *Application Programming Reference, Volume 1*
- *Application Programming Reference, Volume 2*
- *Application Programming Reference, Volume 3*
- *Messages and Codes*
- *Migrating Databases to AIX and Windows NT*

Chapter 1. Introducing the Client for Windows

The IBM ImagePlus VisualInfo solution is a complete document management system designed to simplify your paper-intensive processes and increase productivity. The VisualInfo Client for Windows provides an interface that enables you to bring documents into the system, view and work with the documents, and store and retrieve them.

With the Client for Windows, the basic flow of documents and information is as follows: to store a document into the system, you import it from a directory or capture it by scanning its pages. You then index the document with information that will help you identify it and retrieve it later. From that point, you can electronically route the document to other users who might do the following:

- Organize documents into electronic folders
- Retrieve groups of related documents and folders
- Start a document or folder on a workflow
- Route a document to other users for additional processing
- Add comments or highlights to a document

There are many ways to customize the VisualInfo system to fit the business needs of your enterprise. Your exact process depends on how your enterprise has chosen to implement and configure the system.

When you read this book, keep in mind that your system configuration and user ID privileges determine what options are available to you and what tasks you can perform. You might not be authorized to perform some of the tasks described in this book. Your system administrator can tell you what options are available.

Because the Client for Windows is the main client application you will be using to access documents and folders in the VisualInfo system, this book frequently refers to it as the *client application*. Strictly speaking, “client application” can also refer to the VisualInfo Client for OS/2, or to any custom-built client application you might use. However, for most purposes in this book, “client application” and “Client for Windows” are the same.

Client for Windows concepts

The Client for Windows makes use of the following concepts. For an example of how the concepts might apply to an actual working system, see “Example of a VisualInfo implementation” on page 5.

- Documents
- Folders
- Tables of Contents
- Workbaskets
- Workflows

Documents are items that can be stored, retrieved, and exchanged as a single unit among systems and users. A single document can contain many different types of base parts, including text, images, and objects such as spreadsheet files.

Folders are a way to group related documents and other folders together. Grouping items in folders makes them easier to retrieve. In addition, the Client for Windows uses folders to display search results after you search the fileroom. Your system administrator can define other ways to use folders in your system.

Tables of Contents (TOCs) enable you to access documents and folders for processing. They are windows that list the contents of a workbasket or folder, or the results of a search.

A *workbasket* is a temporary holding place for documents and folders that are either in process or waiting to be processed. Items in the workbasket are ordered much like items in a queue. A workbasket definition includes the rules that govern the presentation, status, and security of its contents. Your system administrator can define workbaskets to organize your work. A *user-selected* workbasket enables you to select documents and folders from a Table of Contents. A *system-assigned* workbasket does not have a Table of Contents. It displays items for processing one after the other, based on their assigned priority.

A *workflow* is a pre-defined sequence of workbaskets through which a document or folder travels while it is being processed.

Storing documents in the VisualInfo system

The Client for Windows enables you to bring documents into the VisualInfo system either by scanning them digitally or importing them as files. VisualInfo stores documents on an *object server* that can be accessed with different levels of access authority from the the various workstations on which the Client for Windows is running.

You can use a scanner to convert your paper documents into document images that you can store and work with in the Client for Windows. You can use the Client for Windows to adjust settings for your scanner, scan documents into the system, and save the scanned documents. For more information, see “Scanning documents” on page 21.

Using the Client for Windows, you can import files from different directories on your workstation or local area network (LAN). The VisualInfo system supports a variety of data formats for importing files, and your system administrator can define additional ones.

You can also export files from VisualInfo to other directories on your workstation or LAN. You might want to export files to use them with another application or move them to another location. For more information, see “Importing and exporting documents or images” on page 25.

Adding retrieval information

In order to retrieve documents that you store in your VisualInfo system, you *index* them by assigning them values for pre-defined *key fields*. You can index individual documents, as well as folders that contain multiple documents. To index an item, you select an index class and then type in appropriate key field values for it.

An *index class* is a category used to identify a group of documents and folders stored in the fileroom. Your system administrator creates index classes that reflect the business needs of your enterprise. Every index class includes a set of key fields, which are categories of information such as "Name" and "Social Security Number" that help to uniquely identify an item.

Although the procedure for indexing is fairly simple, the indexing information you assign to a document or folder is very important. It influences how the item is stored, retrieved, presented for display, and processed. For more information, see Chapter 5, “Indexing documents and folders” on page 39.

Searching for specific documents and folders

The Client for Windows provides a search capability to search the fileroom for specific items. You can retrieve items within a single index class, or in all classes, by specifying index field values as search criteria. For more information, see Chapter 6, “Locating documents and folders” on page 43.

Working with documents and folders

The Client for Windows provides many different options for working with documents and folders, such as the following:

- Checking out and in
- Adding or removing from a folder or workbasket
- Routing
- Suspending
- Changing priority
- Displaying
- Annotating
- Deleting
- Exporting
- Printing

Some of these options are not available when the Client for Windows is installed with a VisualInfo for AS/400 system. In particular, checkin/checkout, suspending, and workflow operations are not available.

For an introduction to the basics of working with documents and folders in workbaskets and workflows, see Chapter 7, “Workbaskets, folders, and workflows” on page 55.

In the Client for Windows, processing documents and folders means specifying how and where they should be routed for work, and whether they are available to work on. Processing includes the following activities:

Checking documents and folders out and in: Checking out a document or folder ensures that only one user is working with the item at a time. When you check out an item, other users can view it, but cannot perform any processing tasks on it. When you check in a document, you free it for other users to process.

Routing documents and folders to workbaskets: You can route a document or folder from one workbasket to another. For example, you might route a document or folder to the workbasket of a supervisor if you discover a problem with it. When items are in a workflow, you can route the item to the next workbasket in the workflow; however, an item does not need to be in a predefined workflow for you to route it to a workbasket. When you store documents in the system you can assign them to a default workbasket. A document or folder can also be automatically started in a workflow based on its index class definitions.

Moving documents and folders through a workflow: When you finish processing a document or folder, you can route the item to the next workbasket in the workflow, move it to another workflow, mark it as completing the workflow, or remove it from the workflow.

Suspending documents and folders: Suspending a document or folder makes it temporarily unavailable to users working with system-assigned workbaskets. You can suspend a document or folder until a specified date and time. In addition, you can suspend a folder until documents of one or more selected index classes are added to it.

Changing the priority of documents and folders: Changing the priority of a document or folder moves it up or down in the processing order in a system-assigned workbasket.

Working with displayed documents

The Client for Windows provides a variety of functions for working with document images. Although you cannot change the text or the image of the document itself, you can use the viewing functions as tools to make your job easier.

If your system administrator has given you the authority to do so, you can annotate documents in a number of different ways. For example, you might want to add highlighting or notes to an important section of a document.

Other tools can help you move quickly to the page you want in a document or group of documents, or zoom in on a portion of a document to read small print. For more information, see Chapter 8, “Viewing and annotating documents” on page 67.

Printing documents

You can print documents when you have them displayed or selected in a TOC window. For more information, see Chapter 9, “Printing documents” on page 83.

Example of a VisualInfo implementation

To illustrate how the Client for Windows might be tailored to a specific environment, imagine the claims department for an insurance company where employees gather information on pending claims and resolve them. Their processes involve large amounts of paperwork and sharing of documents and information.

To convert the existing processes to a VisualInfo system, the system administrator would create the following:

- Index classes
- Key fields
- Document folders
- Workbaskets
- Workflows

The system administrator might set up user IDs with limited access privileges for employees who perform only the scanning or the indexing phase of their business. Employees who review claims might have greater access that permits adding notes and changing index information, but not deleting documents. Still other users might require even more extensive privileges to resolve problem claims or correct mistakes.

Index classes and key fields

The index classes are like “file cabinets.” They represent the main categories into which the company's documents are sorted. The insurance company system might contain the following index classes:

- Claim forms
- Appraisals
- Policies
- Accident reports
- Medical reports
- Correspondence

Each index class can contain a different set of key fields. For example, the Appraisal class of documents might include key fields labeled *Last Name, Claim Number,* and *Appraisal Amount*. When an employee of the insurance company needs to retrieve a particular appraisal, the name, claim number, or appraisal amount can be used to search for the required document.

Folders

As documents enter the system, the client application can automatically sort and store them into folders. For example, the system administrator can have the client application automatically store all items indexed with the same claim number in a single folder. In this way, the client application automatically groups all the documents for a particular claim together. A folder can also contain the results of a search of the system. When a system user opens a folder, a Table of Contents window (TOC) lists the documents in the folder. Claims adjusters or other users can view claims for a particular policy holder by accessing them from a TOC.

Workbaskets and workflows

Users can process documents according to the workbaskets the documents are assigned to, and the workflows that connect these workbaskets. Newly scanned or imported documents might start in a specific workbasket, so that a person assigned to index them would find the required documents collected in one location.

Once they are indexed, the workflow can automatically route them to workbaskets for further processing. When a claims processor completes work on a routine form, the workflow can route it to the workbasket of a senior processor for review. If a claim presents problems, the claims processor can reassign it to a workbasket for a supervisor.

Note: Workflow processing is not available with VisualInfo for AS/400.

Chapter 2. Getting started

To start the client application, select **Programs** from the Windows Start menu, then select **VisualInfo for Windows**, then **Client Application**.

From Windows 3.1 or Windows for Workgroups 3.11, you can also start the client application by double-clicking on the Client Application icon in the VisualInfo container window.

Do not perform any other operation while the program is loading. The program and its environment require several seconds to load.

The Client for Windows Logon dialog box opens, with the Client for Windows Main Window behind it. At startup, the Main Window options are disabled until a valid user logs on.

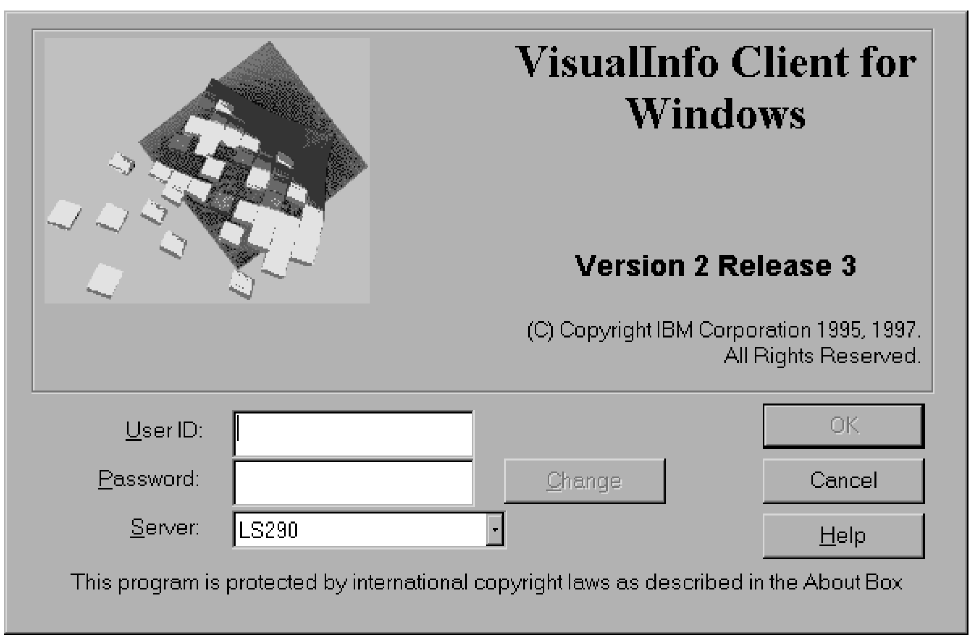


Figure 1. Logon dialog box

In order for the client to start, the VisualInfo client messenger must be running. The client messenger starts automatically whenever you start the application. (If you need to shut down the client messenger, click **Stop Client Messenger** on the VisualInfo for Windows menu.

Prior to logon, user IDs and passwords must be assigned to each user by the system administrator. In addition, the library server and object server must be available on the system. Check with your system administrator if you are not sure about this information.

Logging on

The Logon dialog box enables you to enter a user ID, Password, and server name when the Client for Windows starts.

To log on, do the following:

1. Verify that you are logging on to the appropriate library server. Normally, your system administrator has set a default library server.
2. Enter your user ID. A User ID uniquely identifies each user to the system.
3. Enter your password. A password provides security so that only the authorized user can log on with that User ID.
4. Press Enter or click on the **OK** button. The status bar at the lower left corner of the window indicates that the logon is in progress. When the logon is successful, a message will display to tell you so.
5. Click on **OK** to switch to the client application Main Window.

You can change your password by clicking the **Change** button located next to the password entry field. Confirm the new password for verification by the system. After confirming the password, click on the **OK** button to save it. To cancel a password change, click on **Cancel** to return to the Logon window.

If the Server field does not display the server you want to log on to, select it from the drop-down list by clicking on the down arrow and selecting the correct library server.

You can exit without logging on by clicking the **Cancel** button and selecting **Exit** from the File menu in the Main Window.

The Main Window

The Main Window is the starting place for all actions you perform with the Client for Windows. When you open another window, for example a document, workbasket, or folder, it will open within the main window. The Client for Windows interface is an MDI (Multiple-Document Interface) that enables a user to open more than one document, workbasket, or folder at a time.

Figure 2. The Main Window

The Main Window includes the following:

Standard window controls
Restore, Move, Size, Minimize, Maximize, Close.

Title bar
A horizontal bar at the top of the window that shows the name of the application. When you open a workbasket, folder, or document, its name displays in the title bar.

Menu bar
A horizontal bar below the title bar that displays command options.

Tool bar
A horizontal bar below the menu bar that contains short cut buttons for often-used operations.

Status bar
A horizontal bar at the bottom of the window that displays information about the Client for Windows.

Main Window menus

The menu bar across the top of the window displays a series of commands. These commands give you point-and-click access to menus that enable you to work with documents, folders, and workbaskets in the client application.

The menus change dynamically, depending on whether a folder, workbasket, or document has focus in the active window. All the possible menu choices are listed below. To indicate which choices are active for different windows, an “x” appears in the appropriate column. For choices that are active when no window is open, an “x” appears in the “None” column. If a column is blank, the menu does not display on that window.

All menu options can also be activated by a “hot key” combination of the ALT key and an underlined letter in the menu command. For example, you can exit the Windows Client with the key combination of ALT+F, then X. The F in **File** and the X in **Exit** are underlined.

File menu

Displays general actions you can take on files, windows, or the VisualInfo system.

	Workbasket	**Document**	**Folder**	**None**
Open	x			
Browse	x			
Open Workbasket	x	x	x	x
Close	x	x	x	
Print	x	x		
Logon				
Import	x	x	x	x
Scan	x	x	x	x
Exit	x	x	x	x

Selected menu

Enables you to work with the contents of the current window.

	Workbasket	**Document**	**Folder**	**None**
Index Document		x		
Document Notes		x		
Index Folder			x	
Folder Notes			x	
Select All	x		x	
Deselect All	x		x	
Add to Folder	x	x	x	
Add to New Folder	x	x	x	
Add to Workbasket	x	x	x	
Export	x	x	x	
Delete	x	x	x	
Remove from Folder			x	
Remove from Workbasket	x	x	x	

Process menu

Enables you to perform processing functions on a workbasket or document window. The Checkout and Workflow functions are not available on VisualInfo for AS/400.

	Workbasket	Document	Folder	None
Checkout	x	x	x	
Priority	x	x		
Suspend	x	x		
Activate	x	x		
Start Workflow	x	x	x	
Change Workflow	x	x	x	
Complete Workflow	x	x	x	
Remove from Workflow	x	x	x	

Edit menu

Enables you to copy a document. Only displays when an open document has focus.

	Workbasket	Document	Folder	None
Copy		x		
Insert New Object		x		
Object		x		
Import		x		

View menu

Displays viewing options for the document. Only displays when an open document has focus.

	Workbasket	Document	Folder	None
Document Bar		x		
Comment Bar		x		
Hide Comments		x		
Rotate		x		
Clockwise		x		
Counter-clockwise		x		
Previous Page		x		
Next Page		x		
First Page		x		
Last Page		x		
Go to Page		x		
Fit		x		
Zoom In		x		
Zoom Out		x		
Zoom To		x		

Image menu

Enables you to change the appearance of a displayed image. Only displays when an open document has focus.

	Workbasket	Document	Folder	None
Enhance		x		
Invert		x		

Comment menu

Enables you to place annotations on a document. Only displays when an open document has focus.

	Workbasket	Document	Folder	None
Pen		x		
Highlighter		x		
Box		x		
Circle		x		
Line		x		
Arrow		x		
Text		x		
Stamp		x		
Note		x		
Eraser		x		
Delete Selected		x		
Select Comment		x		
Bring to Front		x		
Send to Back		x		
Property Sheet		x		

Workbasket menu

Enables you to move through items in system-assigned workbaskets.

	Workbasket	Document	Folder	None
Next	x			
Save and Next	x			
Delete and Next	x			

Search menu

Enables you to search for documents. Also lists search forms and search form templates that you have created.

	Workbasket	Document	Folder	None
Basic	x	x	x	x
Advanced	x	x	x	x

Options menu

Enables you to customize the client application windows.

	Workbasket	Document	Folder	None
Toolbar	x	x	x	x
Status Bar	x	x	x	x
Thumbnail Bar	x	x	x	x
Preferences	x	x	x	x
Layout	x		x	

Window menu

Enables you to open windows and change the way they display on the screen. Also lists open windows for you to switch to.

	Workbasket	Document	Folder	None
Cascade	x	x	x	
Tile Horizontally	x	x	x	
Tile Vertically	x	x	x	
Arrange Icons	x	x	x	
Close All	x		x	
Close All Documents	x	x	x	
Refresh	x		x	

Help menu

Displays available help options.

	Workbasket	Document	Folder	None
Help Topics	x	x	x	x
Using Help	x	x	x	x
About...	x	x	x	x

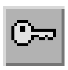
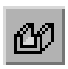
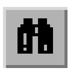
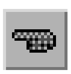
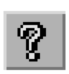
Main Window tool bar

The tool bar buttons can be used as a short cut for often-used tasks. To perform the task, click on the button.

If you hold the cursor over an item on the tool bar a caption pops up, explaining what the button does. For a slightly longer description of the tool bar button, look at the status bar (lower left corner of the window) while the mouse is stopped over the button. The status bar displays a description of the button.

You can toggle the tool bar on and off by selecting **Tool Bar** from the Options menu.

Table 1. Main Window Tool Bar Button Descriptions

Icon	Description	Menu	Command	Keyboard Shortcut
	Logon to VisualInfo	File	Logon...	
	Open a workbasket	File	Open workbasket	Ctrl+W
	Perform a basic search	Search	Basic...	Ctrl+B
	Perform an advanced search	Search	Advanced...	Ctrl+A
	Open the currently selected item	File	Open	Ctrl+O
	Edit index of current folder or document	Selected	Index Folder Index Document	Ctrl+I
	View/edit notes for current folder or document	Selected	Folder Notes... Document Notes...	
	Print the selected document	File	Print...	Ctrl+P
	Gives copyright information about VisualInfo Client for Windows	Help	About VisualInfo Client...	
	Displays help for clicked-on buttons, menus, and windows	Help	Index	

Status bar

At the bottom of the window is the status bar. The status bar has two areas for displaying information:

- The left side of the status bar displays menu item descriptions, tool bar button descriptions, and current processing status.
- The right side displays information pertaining to a system-assigned workbasket if one is open. Otherwise, it says "<no active workbasket>." This applies only to system-assigned workbaskets. Individual user-selected workbaskets can be open, and this status bar will still display "<no active workbasket>."

You can toggle the status bar on and off by selecting **Status Bar** from the Options menu.

Options and preferences

The Options menu enables you to toggle the tool bar, status bar, and thumbnail bar on and off. If the **Tool Bar, Status Bar,** or **Thumbnail Bar** menu choice has a check mark, the bar is currently displayed. To remove the bar, select the menu choice. To restore the bar, select the menu choice again.

If you are working with an open document, you can click on **Document Bar** or **Comment Bar** from the View menu to show or hide the document toolbars.

The **Layout** choice on the Options menu controls the layout of the key fields that serve as column headings on a Table of Contents window. For information on using this choice, see “Configuring the key field layout” on page 32.

The **Preferences** choice on the Options menu opens the Operator Preferences window. This window contains two tabs: **General** and **Advanced**. They enable you to change the settings for several client application functions.

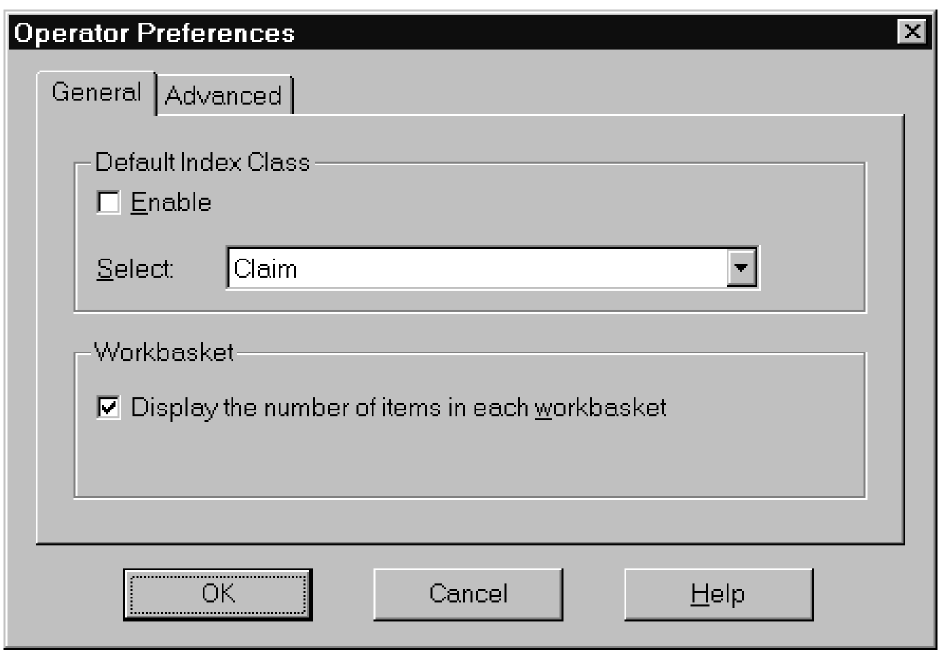


Figure 3. Operator Preferences, page 1

For information about the preferences on the **General** tab, see the following:

- “Creating a default index class” on page 40
- “Displaying a count of items in a workbasket” on page 58

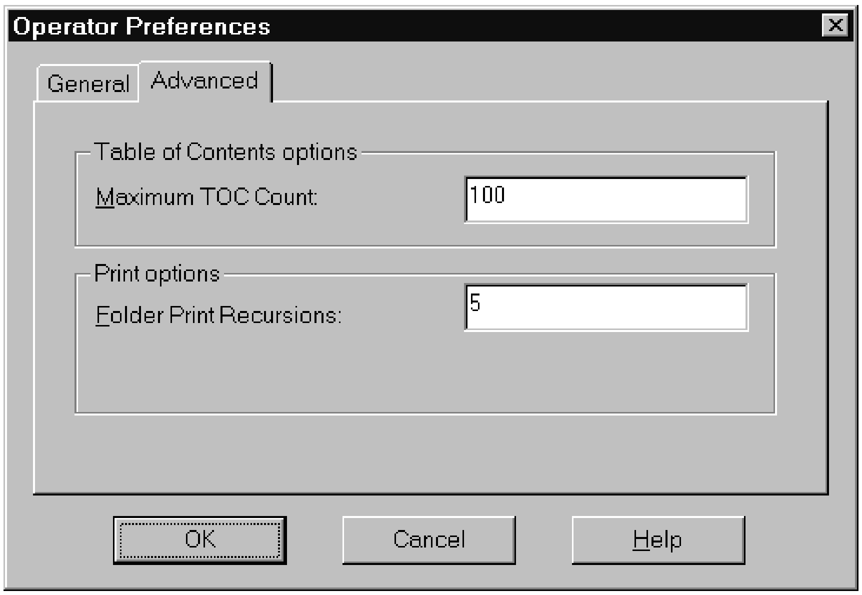


Figure 4. Operator Preferences, page 2

For information about the preferences on the **Advanced** tab, see the following:

- “Controlling the number of items in a table of contents” on page 35
- Chapter 9, “Printing documents” on page 83

Window display

You can use Window menu commands to change the way your document windows and Tables of Contents display in your Main Window. Select from the following commands:

Cascade
Arranges the windows in an overlapping fashion.

Tile Horizontally
Arranges the windows in row fashion, one above the other

Tile Vertically
Arranges the windows in column fashion, one next to the other

Arrange Icons
Arranges minimized windows or icons along the bottom of the Main Window

Close All
Closes all open windows

Close All Documents
Closes all open document windows

Refresh
Updates all Table of Contents windows with changes made to objects in the VisualInfo system

You can also show or hide your toolbars, status bar, or thumbnail bar. (See “Options and preferences” on page 15.) When you do not have a document open, the thumbnail bar displays as a large blank area at the bottom of the Main Window. We recommend that you hide the thumbnail bar unless you are actually using it. For more information, see “Thumbnail bar” on page 69.

Year 2000 enablement

The Client for Windows is enabled for the Year 2000. You can enter 4-digit dates in all date fields. (If you have previously entered 2-digit dates, you must change them manually; the VisualInfo system will not change them for you.)

To accept and display 4-digit dates, you must also have your Windows operating system configured properly. In the Control Panel, under Regional (or International) settings, set the date option to show the 4-digit year.

Although you can still enter 2-digit years, we encourage you not to. The VisualInfo system interprets a 2-digit year as being in the current century. Therefore, unpredictable results are possible if your system is storing any dates in a 2-digit year format.

Getting help

The online help system provides detailed information on the options and procedures that you can use as you are using the program. Contextual help provides instant information about the menu choices you have selected. General help enables you to access information about the window you are working with, and about tasks you can perform with the Client for Windows.

Getting contextual help for menu bar and pull-down menu choices

To get contextual help for a menu bar or pull-down menu choice by using the keyboard:

1. Press Alt or F10 to move to the menu bar.
2. Use the arrow keys to move to the menu bar or pull-down menu choice.
3. Press F1.
4. To exit help, press Esc, double-click on the system-menu symbol in the help window, or select **Exit** from the File menu to return to the window from which you requested help.

To get contextual help for a menu bar or pull-down menu choice by using the mouse:

1. Press and hold down mouse button 1 on the menu bar choice.
2. While holding down the button, move the mouse until your choice is selected.
3. Press F1.
4. To exit help, press Esc, double-click on the system-menu symbol in the help window, or select **Exit** from the File menu to return to the window from which you requested help.

Getting general help

You can request help for most windows. This *general help* provides an overview of all of the actions that you can perform from the window. To get general help for a window, press F1 while the window is the active window. The general help for the window appears.

Some windows also have a **Help** button that you can click on.

To exit help, press Esc, double-click on the system-menu symbol in the help window, or select **Exit** from the File menu to return to the window from which you requested help.

Getting additional help

You can request additional help for the client application by selecting **Help** and then selecting **Help Topics**, **Using Help**, or **About ...**.

Help Topics

The Help topics window provides an index to all the help topics available with the client application. To access a specific help topic:

1. Select **Help** and then select **Help Topics**.
2. In the subject field, type the name of a subject for which you want help. The subject list scrolls to that name (or the closest available match).
3. Double-click on any name in the subject list to display a list of help topics for that subject. If there is only one topic for the subject, the help opens for that topic.
4. Click on any item in the topic list to open the help for that item.

You can also search the help system, either for a particular topic or an individual word.

To exit help, press Esc, double-click on the system-menu symbol in the help window, or select **Exit** from the File menu to return to the window from which you requested help.

Using Help

You can display information about how to use the help facility itself. To display this information, select **Help** and then select **Using help**.

About ...

Select **Help** and then select **About VisualInfo Client** to display the Product Information window. This window provides copyright and version information about the Client for

Windows. If an open document window is active, the menu choice changes to **About Viewer**. This provides copyright and version information for the document viewer.

Using hypertext links

Within a help window itself, hypertext links enable you to move to help topics that cover related subjects. Some links give additional information about the highlighted words or phrases. To get to this help, click on the highlighted term.

Logging off

You can log off the Client for Windows in one of these ways:

- Select **Exit** from the File menu
- Double-click on the system menu symbol in the upper left corner of the window
- Select **Close** from the system menu
- On Windows 95 and Windows NT 4.0, click the X button on the upper right corner of the window.

All of the open program windows are closed.

Chapter 3. Entering documents into the VisualInfo system

You can enter documents into the VisualInfo system in two ways using the Client for Windows: scanning them or importing them.

Scanning documents

Scanned documents are temporarily written to your workstation's fixed disk prior to being stored on the object server. Normally, they are written to the FRNROOT\WORK subdirectory. Be sure you have enough free disk space on the drive where this directory resides. These temporary files are erased as soon as the scanned documents are successfully stored on the object server.

We recommend that you scan and store your documents at a resolution of 200 dpi or lower. This provides better performance and helps prevent an out-of-memory condition that can result from scanning at higher resolutions.

The first time you use a new scanner, you need to load the scanner driver:

1. From the **File** menu on the Main Window menu bar, select **Scan**. A dialog called Loading Driver Names opens briefly. Then the Scanner Selection window opens.
2. Select your scanner from the list.
3. Click **OK**.

To scan a document into the VisualInfo system, do the following:

1. From the **File** menu on the Main Window menu bar, select **Scan**. This opens the Basic Scan window.

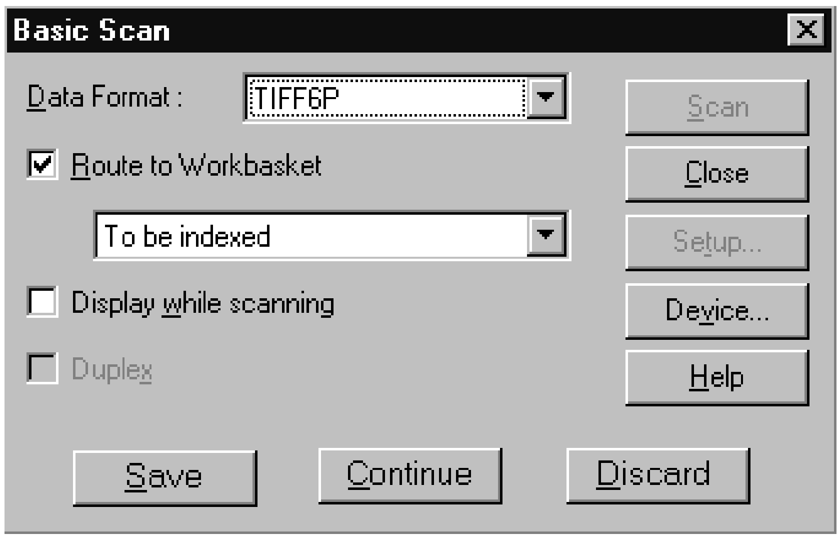


Figure 5. Basic Scan window

2. On the Basic Scan window, select the following:
   - From the **Data Format** drop-down list, select the file format for the scanned image. The drop-down list contains the formats supported by your VisualInfo system. You can access them by clicking on the down arrow to the right of the data format field, and then selecting the desired file format with the mouse or the directional arrow keys. Click on the down arrow again to confirm your selection and close the list.
   - Select **Route to Workbasket** if you want your scanned document to be routed to a workbasket. The **Workbasket** drop-down list contains the names of all the workbaskets you have access to. You can select a workbasket in the same way you select a data format.

     The default workbasket is the **To be indexed** workbasket.
   - Select **Display while scanning** if you want your document to display on your workstation while it is being scanned.
   - Select **Duplex** when you want to scan both sides of two-sided documents. The **Duplex** check box is only available if your scanner supports duplex (two-sided) scanning.
3. Ensure that your document is loaded in the scanner and the scanner is turned on.
4. Click on **Scan**. If you selected **Display while scanning**, a Document window opens. The Document window does not permit you to work with the documents. It

only lets you view the document you have just scanned. (It differs from the Viewer window in this way.)

5. Select **Save** to save the document you just scanned. A Progress Status dialog box opens to indicate the progress of the save. When this dialog box closes, the save operation is complete.
6. Select **Continue** to scan additional pages to be stored as part of the same document. Load the next page to be scanned, then click on **Continue**.
7. Select **Discard** to delete the image that you just scanned.
8. Repeat the preceding steps for all documents that you want to scan.
9. When you are finished scanning, click on **Close**.

Adjusting the scanner setup

You can also use the Basic Scan window to adjust the setup for your scanner or select which scanning device to use.

When you click on the **Setup** button, the Scanner Settings window opens. You can adjust such settings as mode, dither, brightness, and contrast. These settings are specific to the brand of scanner you are using. For further information, refer to your scanner's user documentation.

When you click on the **Device** button, the Scanner Selection window opens. You can use this window to select from among the scanners that are installed on your system. Select a scanner from the list and click on **OK**.

The Scanner Selection window also contains an **Add** button and a **Setup** button. Under normal circumstances you do not need to use these. The **Add** button enables you to add a scanner driver to your system. The **Setup** button opens a Setup window for the selected scanner, which enables you to specify paper size and a default SCSI device.

For more information on scanning for your specific VisualInfo implementation, check with your system administrator.

Considerations for specific scanners

XIONICS scanners

If you are using a XIONICS scanner on Windows 3.1 or 95, you need a special scanner driver from IBM. Contact your local IBM support for this driver.

HP scanners

If you are using an HP scanner on Windows 3.1 or 95, you need a special scanner driver from HP. Contact your local IBM support for further details on what driver you need.

IBM 2456 scanner with IBM Pentium PC 750

If you are using an IBM 2456 scanner connected to an IBM Pentium PC 750, ensure that the scanner is at E-Prom level 1R0G or higher.

Data formats for scanning

To scan large documents (greater than 50 pages), we recommend using either TIFF6 or MODCA2P data formats.

Do not scan using a 12–bit color data format. Only 24–bit color scanning is currently supported.

The Client for Windows supports the following scan data formats.

Note: Windows NT does not support the GIF format.

Format	Scan modes supported
DCX	Black and white (bi-level)
GIF	Black and white (bi-level) 16 grayscale 256 grayscale 24-bit color
JPEG	16 grayscale 256 grayscale 24-bit color
MODCA2P	Black and white (bi-level) 16 grayscale 256 grayscale 24-bit color
PCX	Black and white (bi-level) 16 grayscale 256 grayscale 24-bit color (not recommended)
TIFF6	Black and white (bi-level)

On Windows 3.1, the 24–bit color mode has not been fully tested.

The IOCA data format (Image Object Content Architecture) is not supported. If you create or import a document with this data format, you will not be able to display the item with the Client for Windows.

Using IBM 2456 and Ricoh 410 Scanners under Windows

If you use either the IBM 2456 scanner or the Ricoh 410 scanner under Windows, and you encounter problems, ensure that you contact your IBM Representative to get information on:

- Scanner requirements
- SCSI card requirements
- Scanner ROM versions supported
- Scanner termination and impedance requirements
- WINASPI driver information
- Adaptec 1542C and IBM2456 information.

Importing and exporting documents or images

The Client for Windows enables you to import and export files with a wide variety of file types into and out of your VisualInfo system. You can work with files in many different document file formats, including files for applications such as word processors and spreadsheets.

Importing

You can use the Client for Windows to import files into your VisualInfo system from different directories on your workstation or local area network (LAN). The system supports a variety of data formats for files that you import, and your system administrator can define additional ones.

Before you begin importing, you need to know the following information about the files:

- What the names of the files are
- Where the files are located
- What format they are in
- Whether you should place the files in a specific workbasket in addition to storing them in the library

If you are unsure about any of this information, contact your system administrator before you begin.

To import a document into the VisualInfo system, do the following:

1. From the File menu on the Main Window menu bar, select **Import**. This opens the Import Object window.

Figure 6. Import Object window

2. On the Import Object window, select the following:
   - From the **Data Format** drop-down list, select the file format for the document to be imported. The drop-down list contains the formats supported by your

VisualInfo system. You can access them by clicking on the down arrow to the right of the data format field, and then selecting the desired file format with the mouse or the directional arrow keys. Click on the down arrow again to confirm your selection and close the list.

- Select **Route to Workbasket** if you want your imported document to be routed to a workbasket. The **Workbasket** drop-down list contains the names of all the workbaskets you have access to. You can select a workbasket in the same way you select a data format.

  The default workbasket is the **To be indexed** workbasket.

- In the **File Name** field, enter the complete path name, including the file name, of the file to be imported, for example, `c:\winword\clipart.bmp`.

  If you are unsure of the name of the file you want to import, click on the **Browse** button to display the Open dialog box. You can then select the file to import.

You can also import multiple files by selecting them in one of the following ways:

- Type the path name, then the file names, all separated with a space, in the **File Name** field. Separate each name with a space, as in this example:

  `c:\winword clipart1.bmp  clipart2.bmp  clipart3.bmp`

- Click on the **Browse** button to display the Open dialog box. Drag the mouse down the list if the files are listed sequentially, or hold the control button and select each file individually.

Note: When you import a file, its file type must match the data format specified in the Import Objects window. Otherwise, when you retrieve the document later, you will not be able to view it properly.

Exporting

You can also export files stored in your VisualInfo system to other directories on your workstation or LAN. You might export files that you want to use with another application or move to another location. Before you begin exporting files, you need to know the following:

- What location to export the files to
- Whether to include any note log or annotation information that is associated with the files

It is also important to understand the naming procedure the client application follows when you export files to ensure that you can identify the files after they are exported. As it exports the files it assigns names and file extensions based on the content of the files and the format they are in. The names it assigns are unique.

To export a document:

1. Highlight the document in a Table of Contents window, or open the document.
2. Select **Export** from the Selected menu. The Export window opens.
3. Specify the path of the directory to export the file to by typing the path name in the Destination directory path entry field.
4. Click on the **Export** button to begin exporting the file(s).

To export all the documents in a folder:

1. Open the folder table of contents.
2. Select all items in the folder.
3. Select **Export** from the Selected menu. The Export window opens.
4. Specify the path of the directory to export the files to by typing the path name in the Destination directory path entry field.
5. Click on the **Export** button to begin exporting the file(s).

Chapter 4. Using tables of contents

A Table of Contents (TOC) window is a window showing a list of documents or folders. A TOC window can represent a workbasket, a folder or a search result. Individual folders and documents are accessed with the TOC window in ways appropriate to the individual items.

The client application uses Table of Contents windows to organize and present lists of folders and documents when it opens a folder or workbasket or presents a list retrieved from a search. You use the TOCs to select the specific documents and folders that you want to work with.

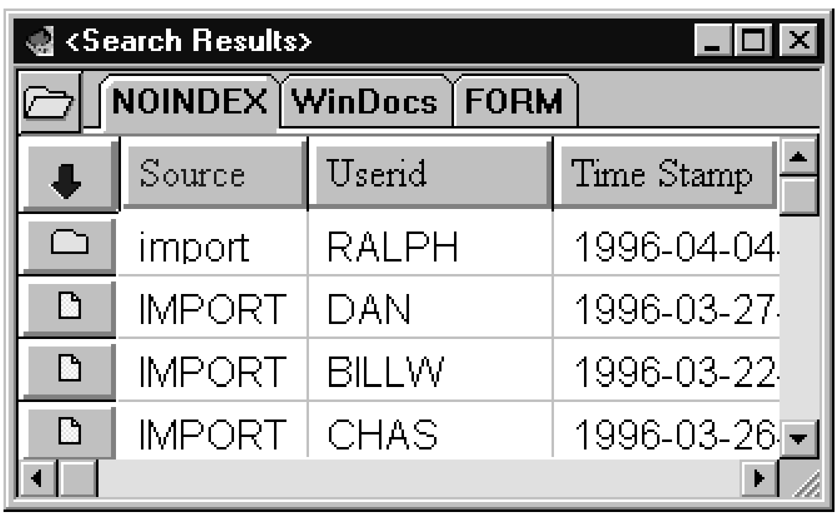


Figure 7. Table of Contents window

On the left end of each row in the TOC, a button indicates whether the item is a document or a folder. To the right of this button, the row displays the indexing data that has been associated with the item. For items that have not been indexed yet, descriptive information about the item is shown, including the source of the item, the user who entered it into the system, and a time stamp indicating when it was entered.

Tabs along the top row of the TOC indicate the index classes associated with the items in the TOC. When the documents and folders listed in the TOC are all of the same index class, only one tab appears.

If the TOC contains documents or folders in different index classes, each index class has its own tab (for example, a TOC could contain documents with an index class of *Service Documents* and other documents with an index class of *Claim*). By clicking on a tab, the user can change to the page of the TOC that lists documents and folders in that index class.

The column headings for each page of the TOC represent the key fields for the index class (such as *Claim Number*, *Customer Number*, or *Customer Name*). You can change the layout of these key fields by using the Options menu. See “Configuring the key field layout” on page 32.

Types of tables of contents

The three types of TOC (Folder, Search Results, and Workbasket) look very similar. However, there are small but important differences between them.

Folder table of contents

In addition to being a container for VisualInfo objects, a folder is itself a VisualInfo object. Therefore, you can perform actions on it such as adding it to or removing it from a folder or workbasket, adding notes to it, suspending it or activating it.

To do these actions, you must be able to select the folder. In addition to selecting any folder by clicking on it in a TOC, you can select the TOC itself by clicking on the *selection icon* near the upper left corner. This means that you have selected the folder represented by the TOC. When you do this, you can perform actions on the folder like you would on any other object in the VisualInfo system.

Note: The folder selection icon does not apply to **Index folder** or **Edit folder notes**. These commands apply to an open folder that is in the active window but does not have its selection icon selected.

Figure 8 shows the index class tabs for a typical folder TOC, with the selection icon to the left.

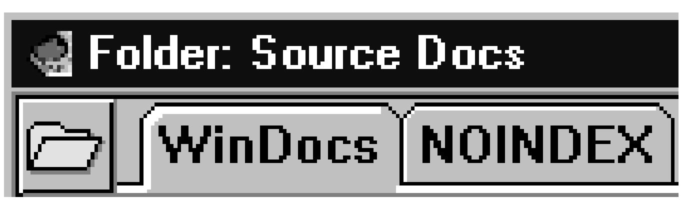


Figure 8. Folder selection icon (unselected)

When you click on the selection icon, a check mark displays to indicate that the folder represented by the TOC is selected.

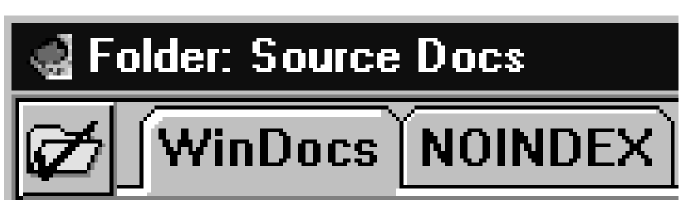


Figure 9. Folder selection icon (selected)

Search results table of contents

The results of a search are displayed in a TOC window which represents a folder, and can be selected like any other folder. However, until it is indexed, a search results folder is only a temporary holding place for fileroom objects. You cannot perform operations on a search results folder such as adding it to, or deleting it from a workbasket or folder, unless you first index the search results folder. Then it behaves like any other folder in the VisualInfo system.

After indexing the search results folder, if you want to perform an operation such as routing it to a workbasket, you need to click on its selection icon, as you would with any other folder.

Workbasket table of contents

A workbasket is a container for VisualInfo objects but is not itself an object. Therefore, you can not perform operations on a workbasket such as indexing or adding it to workbasket or folder. You can only perform such operations on a workbasket as opening, closing, adding or removing objects, and changing how object names are displayed. (See "Workbaskets" on page 56 .)

Because a workbasket is not considered a VisualInfo object, it is not selectable. Therefore, the selection icon is disabled for all workbasket TOCs.

Opening a table of contents

You can open a TOC in several different ways.

- From the File menu, select **Open Workbasket**. This opens the Select Workbasket window. You can select a workbasket and click on **OK**. This opens a TOC for the selected workbasket.

  Note: System-assigned workbaskets do not have a table of contents. When you open a system-assigned workbasket, you are presented with the highest-priority item in the workbasket.

- From the Search menu, select **Basic**. This opens the Basic Search window. You can search the fileroom for documents that meet certain criteria. When the search is compete, a Search Results TOC opens. For detailed information, see Chapter 6, "Locating documents and folders" on page 43.

- From any open TOC, you can open a folder TOC in one of the following ways:

  – Double-click on the folder button or the row containing the folder information.
  – Click on the row containing the folder information to select it, then from the File menu, select **Open**.

  This opens a TOC for the selected folder.

Opening more than one table of contents

The Client for Windows enables you to work with multiple TOCs. To open additional TOCs, follow the same steps you followed to open the first one. All TOCs remain open until you close them.

Using the standard window controls, you can maximize, size, or minimize your TOCs. Using the Window menu, you can choose to display them cascaded or tiled.

You can also use the Window menu to select which TOC you want to view. The Window menu lists all open windows. Select a window from this list to display that window in the Main Window viewing area.

Controlling the appearance of the table of contents

The Client for Windows gives you several ways to control the appearance of the Table of Contents windows. You can configure each window according to how you use it. You can control the key field order, sort order of the rows, row height, column order, and width of individual columns.

Configuring the key field layout

You can configure the key field layout for any index class listed in your TOC. This means that you can choose which key fields appear as the column headings for the TOC, and the order they appear in.

1. If your TOC contains more than one index class tab, select the tab for the index class whose key fields you want to configure.
2. From the Options menu, select **Layout**. This opens the Configure Key Field Layout window.

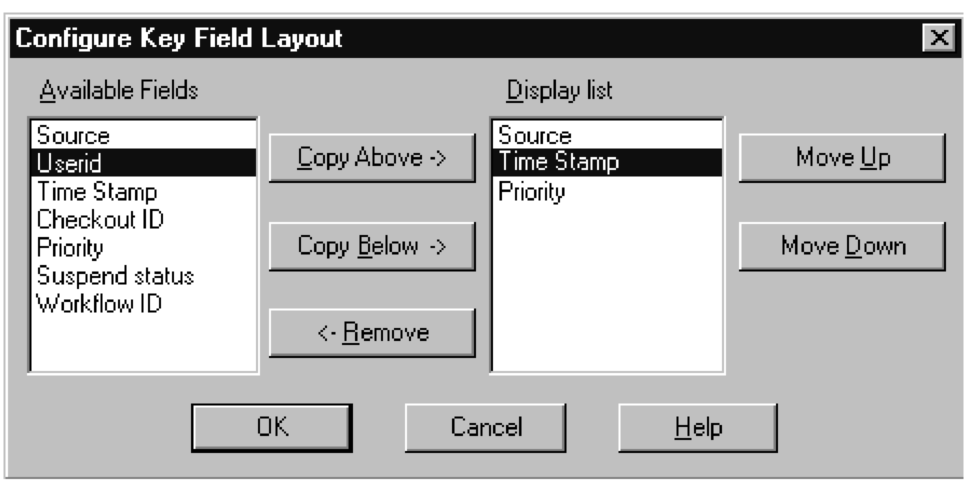


Figure 10. Configure Key Field Layout window

The list on the left, **Available Fields**, includes all the key fields available for the selected index class. The list on the right, **Display list**, includes the key fields currently displayed, in the same order as they appear in the TOC.

3. Select a key field name from the **Available Fields** list.
4. Select a key field name from the **Display** list at the location where you want to insert the new key field name.
5. Click on **Copy Above** or **Copy Below**. This adds the new key field name to the Display list above or below the selected name.
6. To change the order of the display list, select an item and click on **Move Up** or **Move Down**.
7. To remove an item from the display list, select the item and click on **Remove**.
8. When you have finished making your changes, click **OK**. This saves your changes to your workstation's hard drive. Whenever you display this index class in a TOC, its key fields are laid out in the way you specified.

The key field layout is specific to the Client for Windows on your workstation. The changes you make are only saved on your workstation.

Controlling the layout

Sorting the table of contents

Click on the column name to select a column. The selected column name changes color. When a column name is selected, the items listed in the Table of Contents are automatically sorted in either ascending or descending order by the data listed in the selected column.

The uppercase letters sort first, followed by the lowercase letters. For example, uppercase “Z” sorts immediately before lowercase “a.”

Selecting the sort order

To change the sort order, click on the arrow in the upper left corner. This toggles the arrow between ascending and descending order. To sort the Table of Contents in ascending order (A-Z or 1-9), the blue arrow must be pointing up. To sort in descending order (Z-A or 9-1), the blue arrow must be pointing down. Figure 11 on page 34 shows the column headings for a TOC that is sorted in ascending order by the first column, *Brief Description*.

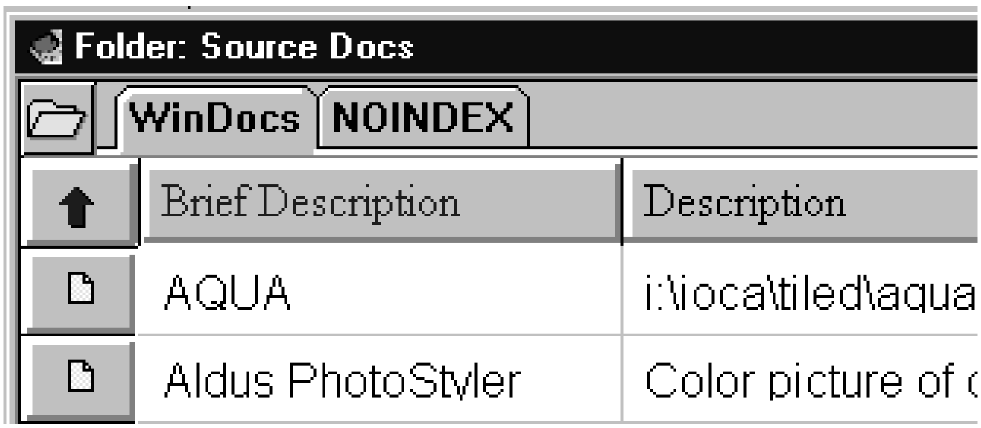


Figure 11. Sort order, ascending

Reducing and enlarging row size

To enlarge or reduce row size in the TOC, position the mouse cursor anywhere on the line between the first and second row. (Note how the cursor changes to two parallel lines with arrows on each side, as in Figure 12.) Hold down the left mouse button and drag the mouse up or down to increase or decrease the row height for the entire Table of Contents. Reducing the row height enables you to view more information (additional rows) in the same window.

Figure 12. Changing row size

Column heading row size

You can change the height of the column headings independently of the row heights. Position the cursor anywhere between the column headings and the row beneath them. The cursor changes to two parallel lines with arrows on either side. Hold down the left mouse button and drag the mouse up or down to increase or decrease the height of the column headings.

Reducing and enlarging column size

To enlarge or reduce the size of columns in the TOC window, position the mouse cursor between two column headings. Note how the cursor changes to two parallel lines with arrows on each side. Hold down the left mouse button and drag the mouse left or right to increase or decrease the column width for that column.

Refreshing the table of contents

To refresh a Table of Contents window, select **Refresh** from the Window menu on the Main Window menu bar.

This procedure is useful when you want to know the current contents of a container you are working with. Many actions can change the contents of a folder or workbasket. For example, you can scan, import, reindex, move, or delete items. If you reindex, move, or delete items, the TOC refreshes automatically. If you import or scan, however, the items do not display until you refresh the TOC.

Controlling the number of items in a table of contents

By default, Table of Contents windows display up to 100 items. If an index class or search result contains more than 100 items, only the first 100 are listed.

You can control the number of items that display in a Table of Contents as follows:

1. Select **Preferences** from the Options menu.
2. Click the **Advanced** tab.
3. Enter the desired number in the **Maximum TOC Count** field.
4. Click **OK**.

The Tables of Contents on your workstation will now include up to the number of items that you assigned in the **Maximum TOC Count** field. The default value for the maximum count is 100. There is no upper limit, but the higher you set it, the slower your system's performance can be when you retrieve a Table of Contents.

If you enter 0 as your maximum count, your Tables of Contents list all items.

Selecting items from the table of contents

The Client for Windows provides three types of selection emphasis in TOCs, as shown in Figure 13.

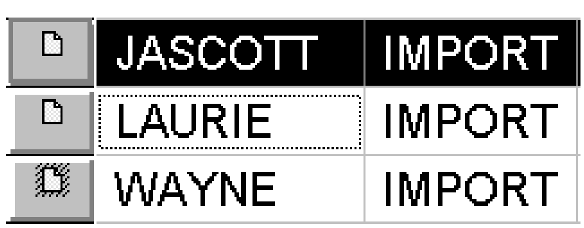


Figure 13. Types of selection emphasis

- *Highlighting* indicates that a row is selected. Highlighted rows are black, with characters appearing in reverse video. When a row is highlighted, you can perform actions on it using the Selected menu or Process menu.
- A dotted rectangle indicates *cursor emphasis* on a particular field in the TOC. This is the field where the cursor is currently located. You can highlight the row that contains the cursor emphasis by pressing the space bar on your keyboard.
- *Hash marks* can display on the folder or document button at the left end of a row. These indicate that the item is open elsewhere on the desktop, even if it is not currently selected.

You can select items in the following ways:

Selecting a folder or document
Click anywhere on the row that represents the folder or document in the TOC. The row is highlighted in black, with characters in reverse video, to indicate that it is selected.

Selecting the currently open folder
To select the currently open folder, click on the selection icon to the left of the index class tabs. When selected, the icon displays a check mark. (For more information on the selection icon, see "Types of tables of contents" on page 30.)

Note: Selecting a workbasket in this manner is not supported.

Selecting multiple items
You can select multiple items in two ways: from the Selected menu or with the keyboard and mouse.

- To select all items in a TOC, choose **Select All** from the Selected menu.
- To select a group of continuous items, select either the top or bottom item with the mouse, press and hold the Shift key, and select the opposite end item with the mouse.
- To toggle the selection of a single item in the list, press and hold the Ctrl key and select the item with the mouse. This selects an item or deselects a previously selected item without affecting any other items on the list.

Deselecting Items

- To deselect all items in a TOC, choose **Deselect All** from the Selected menu.
- To deselect a single item in a TOC, press and hold the Ctrl key and click on the item with the mouse.

Checking documents and folders out and in

Checking out a document or folder ensures that only one user is working with the item at one time. When you check out a document or folder, the folder or document button displays a checkmark, as in Figure 14 on page 37:

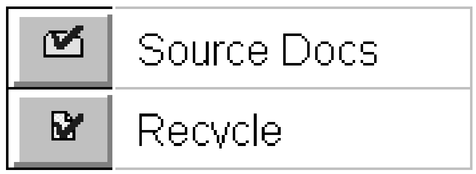


Figure 14. Checked-out folder and document

When a document or folder is checked out, other users can view it in Browse mode by selecting **Browse** from the File menu. However, they can not work with it until it is checked back in.

Any time you open a folder or document from the File menu, it is automatically checked out to you until you close it again.

You can also check out a document or folder by selecting the item and clicking **Check Out** from the Process menu.

When you finish processing a document or folder, and you want to make it available to other users, you can check it in: select the item and click **Check In** from the Process menu.

Opening documents and folders

To open a document or folder, double-click on the item in a Table of Contents, or select the item in a Table of Contents and choose **Open** from the File menu. You can also open an item by selecting it in the TOC and clicking the **Open** button on the tool bar.

When you open a folder, the folder Table of Contents displays. You can use the folder TOC to further select documents or folders that you want to work with.

When you open a document, the first page is automatically displayed, even if the document is large and the client application keeps loading additional pages

You can also open a document in Browse mode. Select the document in a Table of Contents. Then choose **Browse** from the File menu. When an item is open in Browse mode, you cannot index or delete it. In addition you can view the notes but you cannot edit or add to them. If you view a folder in Browse mode, you cannot add items to it or remove items from it.

VisualInfo Client for Windows also allows you to open more than one TOC. To open additional TOCs, follow the same steps used to open the first one. All TOCs remain open until you close them.

Use the standard window controls to maximize, size, or minimize your TOCs. Use the Window menu to display them in tile or cascade style.

Use the Window menu to see which TOCs are open and select which TOC you want to view. Click on that TOC to view it in the Main window viewing area.

Closing documents and folders

You can close an item in several ways. If a document or TOC is displayed in the active window, or if an item is selected in a TOC window, you can do one of the following:

- Select **Close** from the File menu.
- Press and hold Ctrl+Shift, then press O.

You can also double-click on a window's system icon to close it, or click the X button in the upper right corner of the window (Windows 95 and Windows NT 4.0).

Removing and deleting items

The **Remove from Folder** and **Remove from Workbasket** options on the Selected menu work differently from the **Delete** option on the same menu. “Removed” items are just removed from the TOC of the current folder or workbasket, not from VisualInfo. “Deleted” items are removed from the VisualInfo system altogether.

Removing items from folders

1. From a Folder Table of Contents window select the items to be removed by highlighting one or more rows.
2. From the Selected menu, choose **Remove from Folder**. This opens a dialog box, asking you to confirm that you want to remove the items.
3. Click on **Yes** to remove the selected items from the open folder, or **No** to cancel the remove process.

Removing items from workbaskets

1. From a Workbasket Table of Contents window select the items to be removed by highlighting one or more rows.
2. From the Selected menu, choose **Remove from Workbasket**. This opens a dialog box, asking you to confirm that you want to remove the items.
3. Click on **Yes** to remove the selected items from the workbasket, or **No** to cancel the remove process.

Deleting items from folders and workbaskets

1. From a Table of Contents window select the items to be deleted by highlighting one or more rows.
2. From the Selected menu, select **Delete**. This opens a dialog box, asking you to confirm that you want to delete the items.
3. Click on **Yes** to delete the selected items or **No** to cancel the delete process.

Chapter 5. Indexing documents and folders

VisualInfo works in a manner similar to the public library system, where books and other printed material are stored and assigned unique locations. All information stored in the library can be located by using a catalog that indexes the printed material by author, subject, publisher, and physical location. VisualInfo provides this cataloging function through the use of index classes.

Index classes

An index class is a category used to identify a group of documents and folders. For example, an insurance implementation might have index classes such as *Claims*, *Customers*, and *Policy Types*. Your system administrator defines index classes for your system, according to how items are stored, retrieved, presented for display, and processed. Each index class includes a set of key fields. When you index a document, you enter unique information for the document into these key fields.

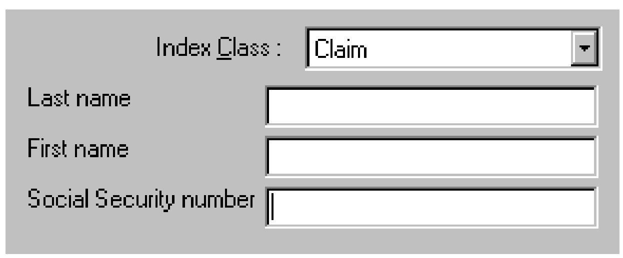


Figure 15. Index class with key fields

You use index classes and key fields as a basis for the search and retrieval of items in the VisualInfo system. See Chapter 6, "Locating documents and folders" on page 43 for a full description of searches.

The NOINDEX class

The NOINDEX index class is a system-defined index Class that is always available. This index class is used when new items such as documents and folders are introduced into the system and there is no index information available. The NOINDEX class associates the following information with a new item:

- Its source, such as *Import* or *Scan*
- The user ID of the operator who entered it
- A time stamp indicating the exact time the item was introduced

Creating a default index class

You can specify an index class to be suggested by default when you initially index documents from the NOINDEX class. To specify a default index class, do the following:

1. From the Options menu, select **Preferences**. This opens the Operator Preferences window.
2. Select an index class from the default Index Class drop-down list.
3. Click **OK** to save this change to your workstation.

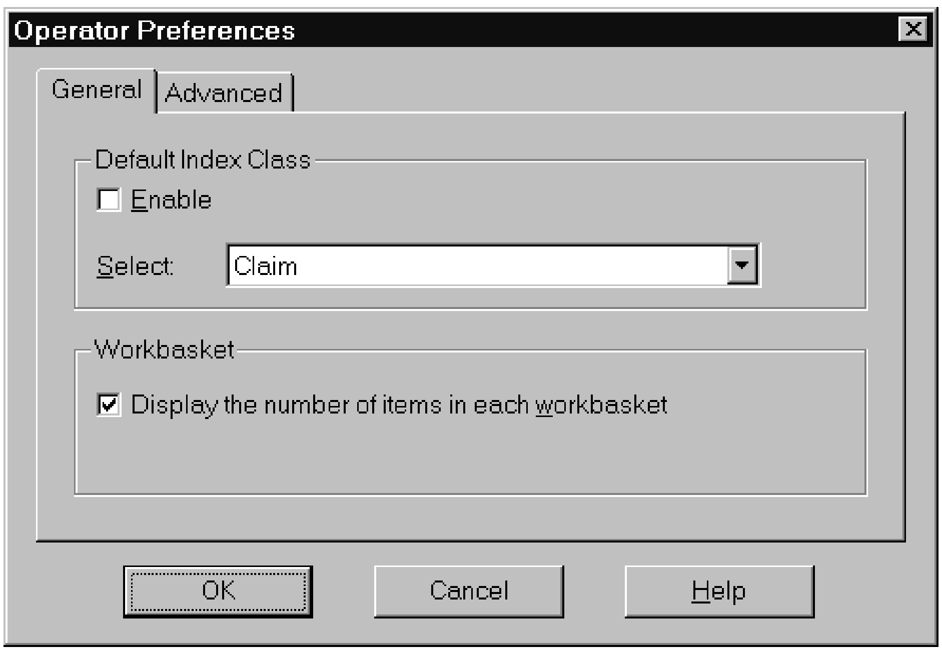


Figure 16. Operator Preferences window

For more information on the Operator Preferences window, see “Options and preferences” on page 15 and “Displaying a count of items in a workbasket” on page 58.

Entering or changing index information

You can enter or change index information for existing folders or documents.

1. Open the folder or document to be indexed.
2. From the Selected menu, select **Index Folder** or **Index Document**. This opens the Edit Index window.

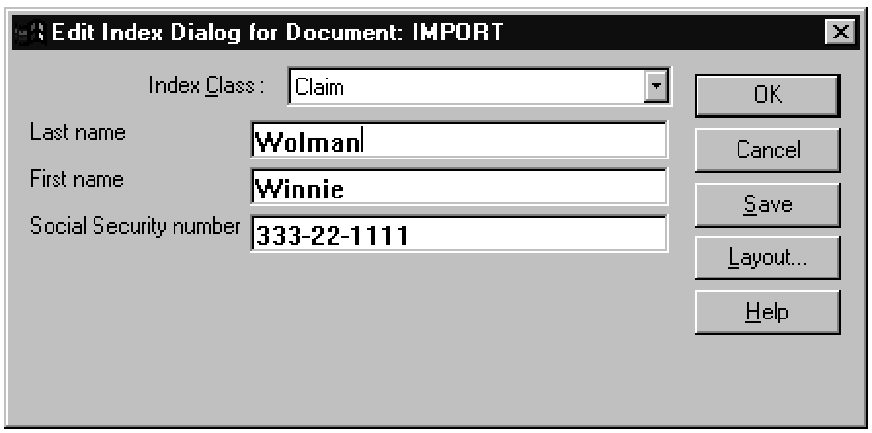


Figure 17. Edit Index window

3. Click on the down arrow to the right of the **Index Class** field. This displays a list of the index classes that you have access to.
4. Click on the desired index class. The key fields for the selected index class will be displayed.
5. Type the desired index values for the key fields. You only need to type a value for the required key fields. If a key field requires a value, it is highlighted.
6. Click on the **OK** button. The new index values for the folder or document will be associated with the item in the VisualInfo system.

Depending on your system setup, objects might be automatically removed from certain workbaskets after indexing. However, if the indexed item has been assigned to the workbasket as part of a workflow, it will remain in the workbasket. This is because items assigned to workflows must always be in a workbasket.

Creating a default set of key field values

In the Edit Index window you can save a set of key field values by pressing the **Save** button after you enter the values. This saves the current settings as the defaults for the current index class.

You might want to do this, for example, if you are indexing a series of claims for the same customer. You could save the information in the key fields for *First Name*, *Last Name*, and *Social Security Number*, so that this information would be automatically assigned to each new claim you indexed. That way, you would only have to enter variable information for each new claim indexed, such as *Date* or *Time*.

Chapter 6. Locating documents and folders

In VisualInfo you locate documents and folders with the Search command. You perform a search by looking for specific data in one or more key fields within a given index class. For example, you could search the *Claim* class for all claims pertaining to a customer named John Smith, or all claims pertaining to John Smith for the year 1995. You could also search *All Index Classes* for all documents pertaining to a given customer.

Basic searches

To perform a basic search:

1. Press the Search button on the tool bar or select **Basic Search** from the Search menu. The Basic Search window opens.

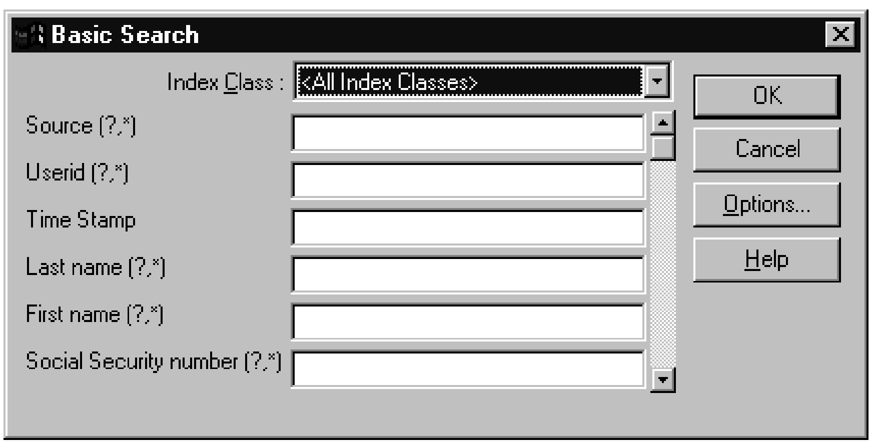


Figure 18. Basic Search window

2. Click on the down arrow to the right of the **Index Class** field to display the Index Class list. This list contains all of the index classes you can access. Select the index class you want to search. When you select an index class, the Basic Search window displays the key fields for that class.
3. Type specific key field values for the items you want to locate. For example, you might want to retrieve documents for a particular customer name, social security number, or date. If you type values in more than one key field, the Client for Windows only retrieves documents and folders that match all of the values you type.
4. Click on **OK** to perform the search. A Table of Contents window opens, displaying a list of all matching items from the index class you chose.

By default, the VisualInfo system only returns the first 100 items that satisfy your search criteria. To change this limit, see “Controlling the number of items in a table of contents” on page 35.

"All Index Classes" search

You can select *All Index Classes* to search all classes. This is the default selection when you open the Basic Search window. You can do this, for example, if you want to retrieve all documents and folders pertaining to a particular customer or claim. If you choose *All Index Classes*, you must enter a value in at least one key field to limit the search.

"NOINDEX" search

You can also select *NOINDEX* as your index class. Searching the NOINDEX class returns all items in the fileroom that have not yet been indexed. By entering values in the key fields, you can narrow your NOINDEX class search to items introduced by particular users or input methods, or on particular dates.

Advanced searches

Advanced search is a powerful and flexible tool for building and executing search requests.

An advanced search query can specify groups for several index classes and set different criteria for every one of them. For each index class, you create a *search expression* using the search criteria (the attribute values) you want for that class.

You define your search request as a *search form*. You can immediately execute the query, but you are also given the option to name and save that form for later use. Having named search forms allows you to perform searches without re-defining them every time. Depending on the kind of searches you usually do, you can use the advanced search capability to accept parameters in search expressions. You can define a certain search-form template and execute it with different concrete values at different times.

Performing an advanced search

There are several ways to perform an advanced search:

- Press the Advanced Search button on the tool bar or select **Advanced Search** from the Search menu. The Advanced Search - Form List dialog displays the list of forms you have saved (Figure 20 on page 45). Select one or more forms and click the **Execute** button. If you have not saved any search forms yet, click **New**. (See “Creating or editing an advanced search form” on page 45.)

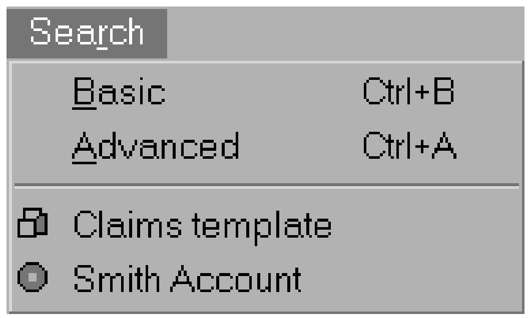


Figure 19. Search menu

- If you have an Advanced Search Form already open you can execute the search from there.
- If your search form appears as a menu item, you can execute that form by selecting the Search menu and clicking on the form name:
  - If the menu item is an executable search form (designated by a circular "bull's eye"), VisualInfo performs the search and displays the results.
  - If the menu item is a search form template (designated by a cluster of squares), VisualInfo displays a template for you to enter your search values.

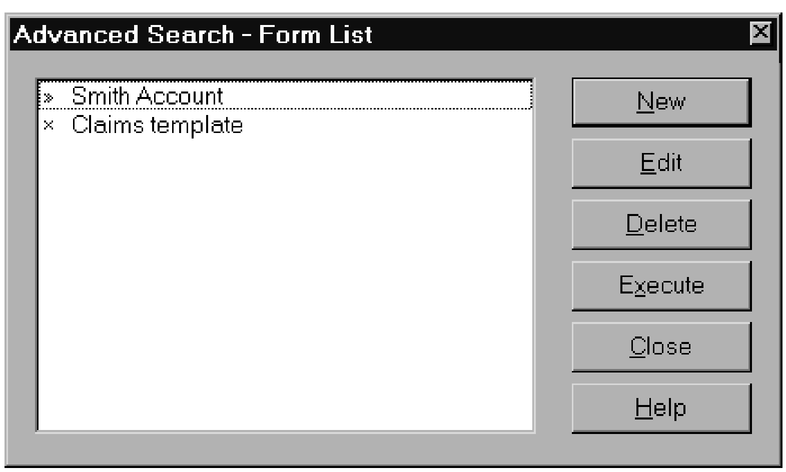


Figure 20. Advanced Search–Form List

Creating or editing an advanced search form

1. Press the Advanced Search button on the tool bar or select **Advanced Search** from the Search menu. The Advanced Search - Form List dialog displays the list of forms you have saved.

2. Select one or more forms and click **Edit**. To create a new form, click **New**. The Advanced Search Form window opens.

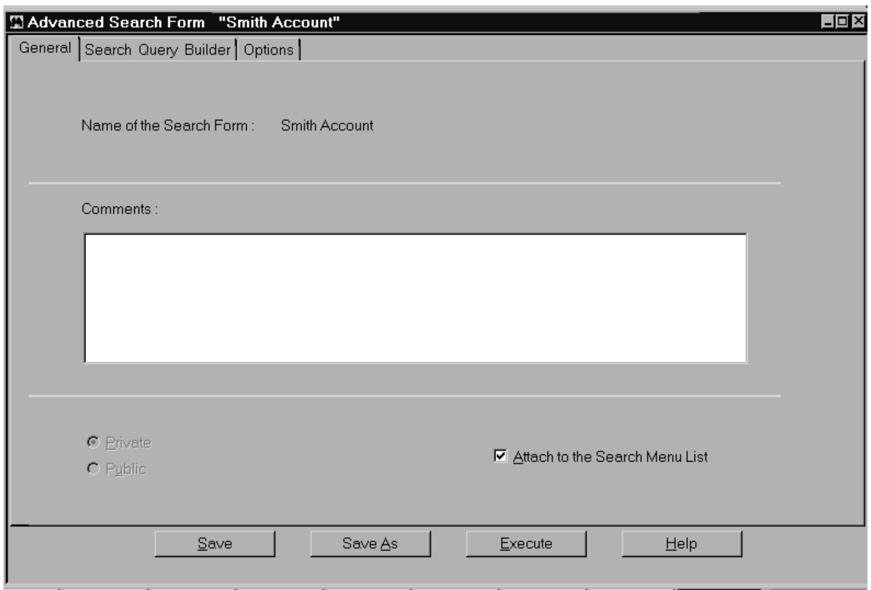


Figure 21. Advanced Search Form window – General tab

3. Select the **General** tab.
4. In the **Comments** field, you can type a description of this search query.
5. Check **Attach to the Search Menu List** if you want to save the form as an item on the Search menu.

   The **Private** checkbox allows only users at your station to view the form. The **Public** checkbox allows other users on the network to view and use the form. Currently only private forms are available.
6. Select the Search Query Builder tab to define your search criteria.

   The Search Query Builder enables you to build a separate query for every index class that you want to search as part of your advanced search. These separate queries are referred to as *Groups*. For example, an advanced search form could define a search with two groups, one that queried for insurance claims between two given dollar amounts and one that queried for customers who had filed claims within a given time period.

   For each search group that you define, a tab displays above the query field at the bottom of the Search Query Builder page.

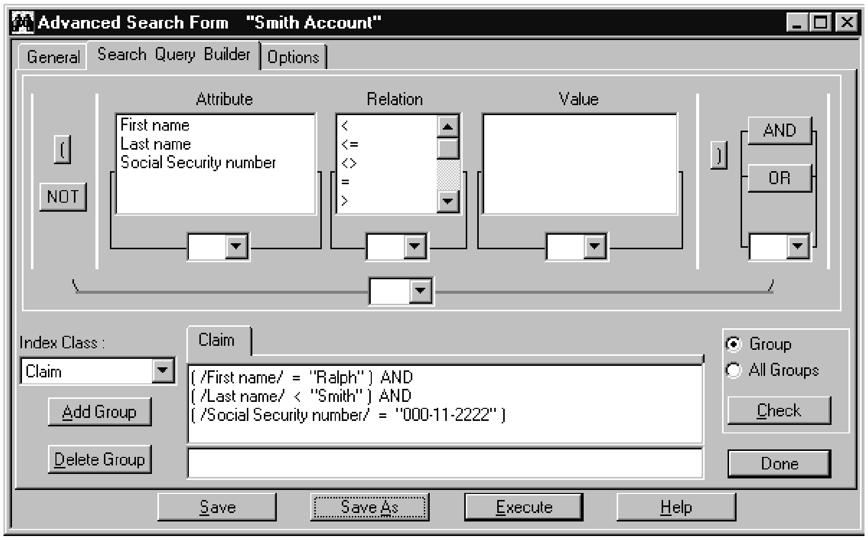


Figure 22. Advanced Search Form window – Search Query Builder

7. To add a group for a given index class to your search form, select that class from the **Index Class** drop-down list, which contains all available index classes. Click **Add Group**. A tab for that group (index class) appears at the bottom of the page with an edit field for the search string.

   To delete a group from your form, select the group tab you want to delete and then click **Delete Group**.

8. For each group, use the tools on that page to create the search expression desired. For details and examples, see "Syntax of search expressions" on page 48.

   - Select attributes of the selected index class by double-clicking on them in the Attribute list
   - Select relationships between attributes and values by double-clicking on them in the Relation list
   - Type values into the Value field
   - Click on the buttons (And, Or, Not, brackets)
   - To create search form templates, insert variable parameters by clicking on the variables in the parameter drop-down lists. For more information, see "Search form templates" on page 50.

   Instead of using the tools, you can manually type your search expression in the edit field. You must follow the search expression syntax rules when typing the search expression manually.

9. You can check the validity of the search expression by clicking **Check**. Select **Group** to check each group individually, or **All Groups** to check all groups in the

form. If the system finds errors in the search expression, a window displays a list of what is wrong, what is expected, and where it is located.

10. When you are finished with the search expression for the group, click **Done**.
11. Click **Execute** to perform the search and retrieve the information. If the system finds an error in the search expression, an error window appears showing the problem.
12. Click **Save** or **Save As** to save the form. A window displays currently used form names. Choose a new name or overwrite an old name, and click **OK**. The system notifies you if the form name is already in use. If there are any errors, the system displays an error message, showing the problem. You need to fix the search expression before you can save it.

The Options tab of the Advanced Search Form window displays additional search options, described on page 53.

Syntax of search expressions

Every search expression is built from the following elements:

- Attributes
- Relation symbols
- Values
- Logical operators
- Brackets

The basic syntax for expressions has the form:

```
Attribute      Relation      ValueList
```

where ValueList is one or more Values (depending on the relation type) separated by at least one space.

A search expression also can consist of several subexpressions, connected by logical operators. Thus you can describe every possible condition you may want the attributes to satisfy.

Examples:

```
/First name/ in  "Ron"  "Jim"  "Bob"  "Peter"

/Title/  like  "Using the * system"

/City/ = "San Francisco" AND
( /Profession/ = "Project manager" OR
 /Profession/ = "Programmer" AND ( /Years of experience/ > "5"  OR
 /Education level/ = "University"))
```

Attribute names

An attribute name is the name of one of the key fields of the index class for the search expression. The attribute name should be surrounded by / symbols, as follows:

```
/First name/
```

If / is one of the characters in the attribute name it should be doubled. For example, “In/Out Document” should be entered as `/In//Out Document/`. If you use the Search Query Builder tools to create the expression, they automatically double the / .

Relation symbols

The valid relation symbols for search expressions are listed below. Except as noted, each symbol takes one value and is valid for all types of attributes.

Relation symbol	Meaning	# of values	Attribute types
=	Equal to	1	all
<	Less than	1	all
>	Greater than	1	all
<=	Less than or equal to	1	all
>=	Greater than or equal to	1	all
in	Equal to one of the listed values	1 or more	all
not in	Not equal to one of the listed values	1 or more	all
like	Like (See “Wild cards” on page 54)	1	string
not like	Not like (See “Wild cards” on page 54)	1	string
between	Between two values (greater than the first, less than the second)	2	all
not between	Not between two values (less than the first, greater than the second)	2	all

Values

The search expression values are the attribute values you want to search on. A value is surrounded by double quotes, for example `"9/30/97"`. If the value itself contains a quote, it should be doubled: `"an ""excellent"" rating"`. When listing multiple values, leave a space between each one.

If you use the Search Query Builder tools to create the expression, they automatically double the quotes and add separating spaces and surrounding quotes. You still need to type the values in the value edit field, entering every value on a new line.

Logical operators

Logical operators are used to connect two or more subexpressions into one expression. The valid logical operators are listed below:

AND The whole expression is satisfied when both subexpressions are satisfied

OR The whole expression is satisfied when at least one of the subexpressions is satisfied

NOT Negates the condition that follows it

Brackets

Brackets can be used to change the default order of a subexpression. You can use them to ensure the desired order of precedence for relation symbols and logical operators in your search query.

Example:

The following search expression:

```
/Name/ like "Ron*"  OR  /Name/ like "Bill*"  AND
/Date of Birth/ between "1/1/60"  "1/1/71"
```

returns all items for which the Name attribute begins with Ron, plus items beginning with Bill for which Date of Birth is between the specified dates.

Adding a set of brackets yields the following search expression:

```
(/Name/  like "Ron*"  OR  /Name/ like "Bill*")  AND
/Date of Birth/ between "1/1/60"  "1/1/71"
```

This expression returns items for which the Name attribute begins with Ron or Bill, for which Date of Birth is between the specified dates.

Search form templates

You can create an advanced search form with parameters and use the form as a template. This way you just enter values for the parameters when you do a search instead of building a new form for each similar search. You can add a template to the Search menu. The VisualInfo system indicates that it is a template by using a cluster of squares as an icon. (See Figure 19 on page 45.)

Creating a search form template

Create a search form template just as you would create an advanced search form. (See “Creating or editing an advanced search form” on page 45.) Use a parameter wherever you want to use variable information in your template.

Parameters

You can create up to 10 variable parameters for each type of search expression element. The valid parameter names are as follows:

Attributes: A1, A2, ..., A9, A0

Values: V1, V2, ..., V9, V0

Relations: R1, R2, ..., R9, R0

Logical Operators: O1, O2, ..., O9, O0

Subexpressions: E1, E2, ..., E9, E0

Surround subexpression parameters with square brackets (**[ ]**) , all other kind of parameters with braces (**{ }**). If you do not type the search expression manually, but use the Search Query Builder tools, they automatically add the braces and brackets.

Examples:

```
/City/ = {V1}  AND  ( /Profession/ = "Project manager"  OR
/Profession/ = "Programmer" AND ( /Years of experience/ > "5"   OR
/Education level/ = "University"))
```

You can execute the query substituting a single city, such as "San Francisco" for V1, or you can substitute a list of cities such as "San Francisco" "San Diego" "Chicago". In this way, you do not need to build different search expressions every time, which are identical except for the value of /City/.

In the same way you can use parameter {V2} instead of the value "5" for /Years of experience/ and do different searches giving V2 different values.

You can also substitute a parameter for an expression: you could substitute [E1] for

```
( /Years of experience/ > "5" OR /Education level/ = "University")
```

Then you can execute a search replacing E1 with the same criteria or with different criteria, such as:

```
( /Skills/ in "Basic" "C++" AND /Age/ between "26" "37").
```

Using a search form template

1. Select a search form template from the Search menu. Search form templates are indicated by an icon that is a cluster of squares. The "Parameters for search form" window opens. Each group (index class) in the template has a tab at the top of the window.
2. Click on the tab for a group that you want to review. This displays the search expression defined for that group. Below the search expression is a set of fields where you can insert specific values for the parameters in the search expression. If a syntax element includes a variable parameter, its fields are enabled.

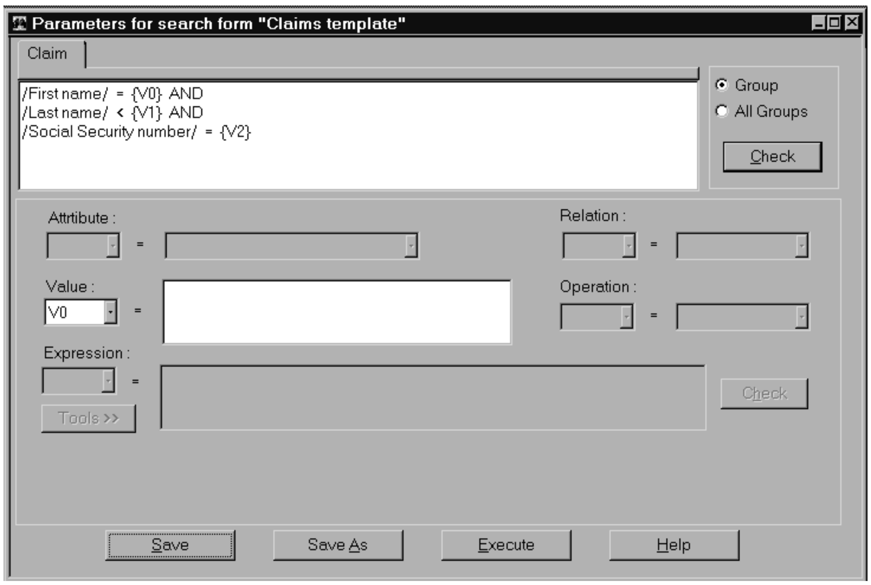


Figure 23. Parameters for Search Form window

3. For the enabled fields, select a variable parameter from the list on the left side of the = sign, then enter the desired value on the right side. Depending on the parameter, you can type a value or select one from a drop-down list. When you type values, you must follow the syntax rules. You can fill in the parameters in any order.

   For a variable subexpression, you can type the subexpression or use the subexpression tools. Open the tools window by clicking the Tools button in the Expressions section. Hide the tools window by clicking the Hide button. For instructions on using the tools, see "Creating or editing an advanced search form" on page 45.

   When you enter a value, the search expression changes immediately. The values are retained as long as the dialog is open, even when you switch to another group. You can change values at any time. For example, if you replace parameter A0 with "Last Name, " you can later replace A0 with "First Name."

4. Click **Check** if you want to test your search expression for syntax errors.

5. Repeat steps 3 and 4 for each group you want to review. You can also manually edit the search expression for a group that does not use variable parameters.

6. After you finish entering values for your variable parameters, you have a fully defined search form.

   - To perform the search immediately, click **Execute**.
   - To save your new search form for future use, click **Save** or **Save as**. This adds the search form to the Search menu.

When you execute a search, the dialog remains open in case you want to save the search or perform another search using different values.

Search options

The **Options** button on the Basic Search window and the **Options** tab on the Advanced Search Form window both give you the same options to further expand or limit your search. You can select or de-select check boxes to specify the type of item (document or folder), workflow status, and suspension status of items you want to search for. By default, all check boxes are selected. This means that a search will return all items in the file room that fit your search criteria.

On the **Options** tab on the Advanced Search Form window, each group of options contains an **All** button. When you click this button you automatically select all the options in that group. In addition, an **All** button near the top of the window enables yuou to select all the options at once.

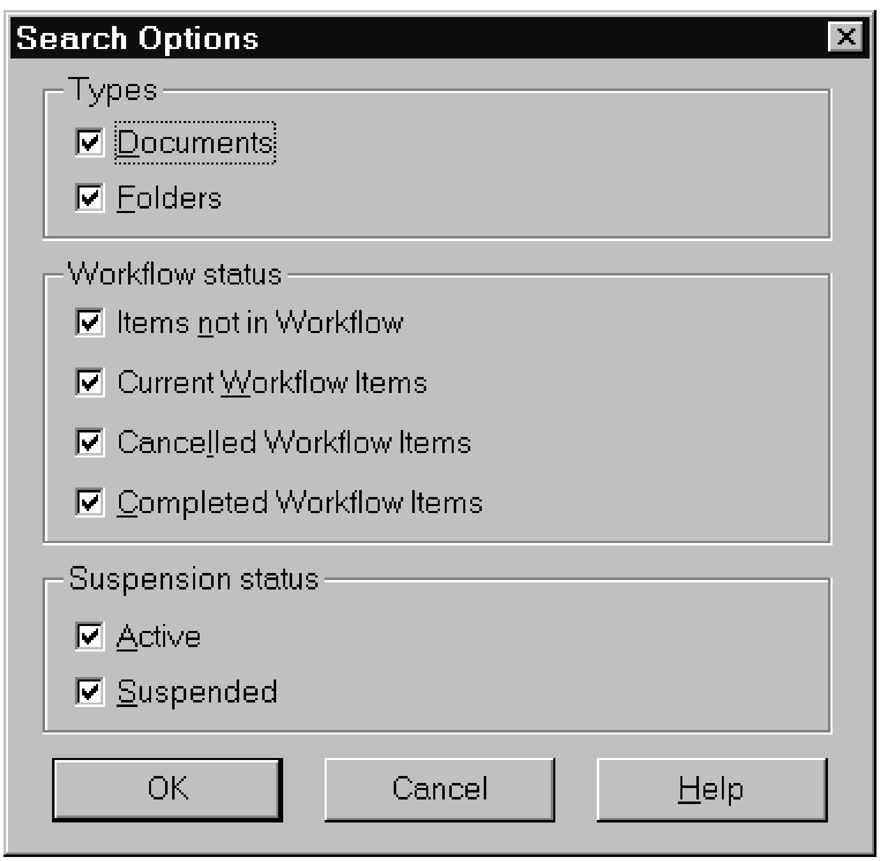


Figure 24. Search Options window for basic search

Case sensitivity of searches

Depending on your environment, the search function can be case sensitive. If you are logged onto to a library server for MVS or AIX , the search is case sensitive. To locate an item, the values you type as your search criteria must match the uppercase and lowercase letters of the indexing values for the item exactly as they are stored in your database. For example, typing Smith will not locate an item with a stored value of SMITH.

If you are logged onto a library server for OS/2 or NT , the search is not case sensitive unless your system administrator has specified that it should be. Although the values you type must match, the letters do not have to match the uppercase and lowercase letters exactly as they are stored. Therefore, typing Smith as search criteria will still locate an item that has a stored value of SMITH. Discuss with your system administrator how you should specify search criteria in your environment.

Wild cards

You can retrieve a group of documents and folders with similar key field values by using a wildcard character. You can type a question mark (?) to substitute for a single character or an asterisk (*) to substitute for any string of zero or more characters. For example, you can type *?athy* to search for Kathy and Cathy.

The wildcard characters can only be used in specific types of key fields. Your VisualInfo system administrator assigns a type to each key field when it is defined. You can use the ? wildcard character to substitute for a character in key fields that are defined as either a fixed-string or variable-string type of field. You can use the * wildcard character in variable-string fields. The Basic Search window indicates when a wildcard character is valid for a specific key field by displaying it in parentheses next to the input field. For example, key fields defined as variable-string fields will show both a ? and * next to the field because both types of wildcard characters are valid.

For an advanced search, you can use wildcard characters the same way you would use them in a basic search. The Advanced Search windows do not indicate which wild cards are valid for specific key fields. To check which wild cards are valid, select **Basic** from the Search menu and then select an index class containing the key fields you want to check. (You can cancel out of the basic search after you do this.)

You cannot use a wildcard character in the **Date**, **Time**, or **Timestamp** field.

Table 2. Using wild cards in a basic search

Key Field	Search Criteria	Results
Claim Number	*450	Returns a list of customers whose customer claim number ends with “450”
Customer Number	12???67	Returns a list of customers with 7 digit account numbers that begin with “12” and end with “67”
Customer Name	John*	Returns a list of customers whose name begins with “John”

Chapter 7. Workbaskets, folders, and workflows

Workbaskets and folders are both containers for items stored in the VisualInfo system. The main difference between workbaskets and folders lies in the uses to which you put them.

You can think of workbaskets as stationary locations in your VisualInfo system that can represent individuals, departments, or processes. Folders are collections of items that can be moved between these workbaskets for processing.

The planned route by which a folder or document moves between workbaskets is a *workflow.* Your system administrator defines the sequence of workbaskets in a workflow. The workflow electronically routes the document to the next appropriate user in the sequence.

Note: Workflows are not available with VisualInfo for AS/400.

Menus for workbaskets, folders, and workflows

Working with workbaskets, folders, and workflows means working with the contents of these items, namely documents and folders. To work with folders and documents, you generally use three menus:

- Selected
- Process
- Workbasket

Selected menu

You can use the Selected menu to select or deselect items in the active TOC, or you can perform actions that will affect all selected items. You can index a folder or document, add notes to a folder or document, add folders or documents to another folder or workbasket, or export a document. The Selected menu will act upon an open document if it is in the active window.

Process menu

The Process menu enables you to perform workflow actions on an open document or selected documents and folders in a TOC.

Workbasket menu

The Workbasket menu is enabled when you are working in a system-assigned workbasket. You can use it to move from one item to the next in the workbasket. For details, see, “System-assigned workbaskets” on page 56.

Workbaskets

Depending on your VisualInfo implementation, a workbasket typically represents a collection of folders or documents that requires a specific, well-defined processing step.

System-assigned workbaskets

When setting up your system, the system administrator defines certain workbaskets as system-assigned. When you open a system-assigned workbasket, the items in that workbasket are presented to you one by one, in the order of their processing priority. You do not see a Table of Contents for these workbaskets and you do not need to select and open each item. The name of the system-assigned workbasket where you are working appears on the right side of the status line at the bottom of the window.

When you finish processing an item in this workbasket, you use the Workbasket menu to move to the next item.

Note that if you do not do anything to remove the item from the workbasket (such as indexing it or routing it to another workbasket), you will get the same item back.

The Workbasket menu contains three choices:

Next
: Displays the next highest-priority item

Save and Next
: Saves any indexing changes, note log changes, or annotations you have added to the current item and displays the next item

Delete and Next
: Deletes the current item and displays the next item. The item is deleted from the VisualInfo system.

Items are bypassed if they are checked out to another user or suspended.

User-selected workbaskets

Your system administrator defines certain workbaskets as user-selected. A Table of Contents appears when you open these workbaskets. When a workbasket contains items from more than one index class, the Table of Contents contains a page for each index class. You can select an index class tab and display the items within that class.

Working with workbaskets

When you are working with a workbasket, you can:

- Open it
- Add items to it
- Display a count of items in it
- Change the priority of the items in it
- Remove an item from it

Opening a workbasket

1. From the File menu, select **Open Workbasket**. The Select Workbasket window opens, enabling you to select a workbasket from the list of previously defined workbaskets.
2. Select the workbasket you want and click the **OK** button. The Table of Contents opens for the workbasket you selected.

You can open as many workbaskets as you need.

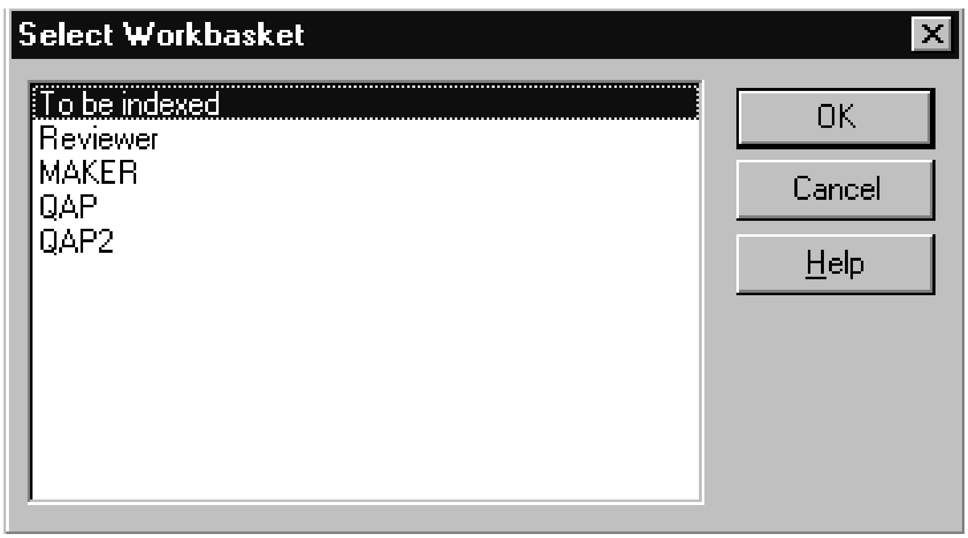


Figure 25. Select Workbasket window

Adding items to a workbasket

1. From a Table of Contents window select the items to be routed to a Workbasket.
2. From the Selected menu, select **Add to Workbasket**. This opens the Select Workbasket window.
3. Select the workbasket to which you want the item added. If an item is in a workflow, the next workbasket in the workflow is indicated as the default selection.
4. When you add items to a workbasket, the Select Workbasket window enables you to change their priority. In the **Priority** field, type a number; 1 is the lowest priority you can assign and 31,999 is the highest. If you do not enter a priority, the default priority for the index class will be used. The default priority is specified by your system administrator. For more information, see “Changing the priority of items in a workbasket” on page 58.
5. Click on the **OK** button. This adds the selected item to the designated workbasket. If the item was already in a workbasket, it is transferred to the new workbasket.

Displaying a count of items in a workbasket

By default, only the first hundred items in any Table of Contents display in a window. If there are more than a hundred items in a TOC, a message will tell you how many items are in the TOC.

If you want to know in advance how many items are in each workbasket, do the following:

1. From the Options menu, select **Preferences**. This opens the Operator Preferences window.
2. Under **Workbasket**, select the check box for **Display the number of items in each workbasket**.

When the display option is selected and you open the Select Workbasket window, a count of items appears after each workbasket name.

Displaying the number slows processing speed, so if speed is an issue, you might want to disable this option. Select **Preferences** from the Options menu and click on the Workbasket check box again. This disables the item count.

Changing the priority of items in a workbasket

You can look at or change the priority of a document or folder. Changing the priority of a document or folder moves it up or down in the processing order in a system-assigned workbasket.

1. Select a folder or document in a TOC window.
2. Select **Priority** from the Process menu.
3. Type a priority value for the document or folder in the **Priority** entry field. You can specify a value from 1 to 31,999, where 1 is the lowest priority (processed last) and 31,999 is the highest priority (processed first).
4. Click on the **OK** push button.

You can also change the priority of an open document:

1. Select **Priority** from the Process menu.
2. Type a priority value for the document or folder in the **Priority** entry field. You can specify a value from 1 to 31,999, where 1 is the lowest priority (processed last) and 31,999 is the highest priority (processed first).

Folders

A folder is a collection of VisualInfo items that can include documents and other folders. Folders can be created and stored automatically, or they can represent the results of a search. When you open a folder, it is represented by its Table of Contents, from which you can select items to work with. For a detailed description of working with Tables of Contents, see Chapter 4, "Using tables of contents" on page 29.

You can do the following things with folders:

- Index a folder
- Open a folder
- Create a new folder
- Add items to an existing folder
- Add notes to a folder
- Delete a folder

For information on indexing a folder, see Chapter 5, "Indexing documents and folders" on page 39. For information on deleting a folder, see "Removing and deleting items" on page 38.

Opening a folder

You can open any folder that is listed in an open Table of Contents. Do one of the following:

- Double-click anywhere on the row representing the folder
- From the File menu, select **Open**

Creating a new folder

1. Select one or multiple items from an existing Table of Contents, or select an open document window.
2. Select **Add to New Folder** from the Selected menu. The Edit Index window opens.
3. Click on the down arrow to the right of the **Index Class** field. This opens the list of available index classes.
4. Select an index class from the list. The key fields will be displayed for the selected index class.
5. Type the key field index values for the new folder and click on **OK**.

   The VisualInfo system creates a new folder indexed with the index class and key field values you entered. The folders and documents you selected are placed in this new folder. The new folder's TOC opens automatically.

Adding items to an existing folder

1. Select the items you want to add to an existing folder.
2. From the Selected menu, select **Add to Folder**. This opens the Basic Search window.

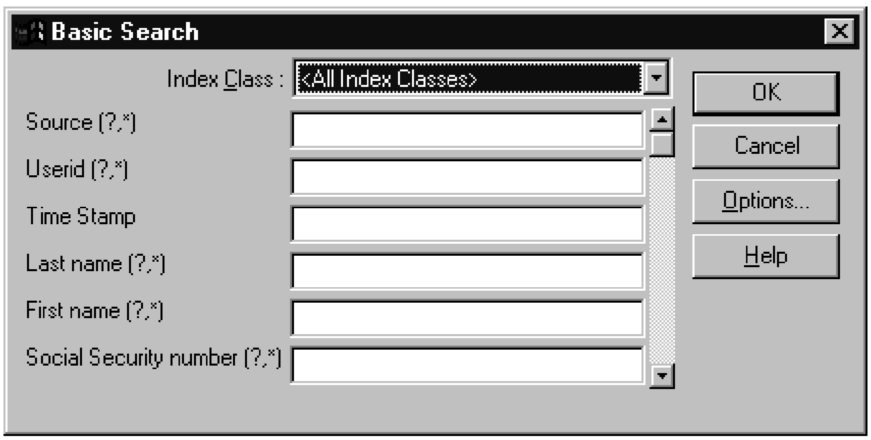


Figure 26. Basic Search window

3. Click on the down arrow to the right of the **Index Class** field. This opens the list of available index classes.
4. Select the index class that is assigned to the target folder. The key fields will be displayed for the selected index class.
5. Type one or more key field values that are assigned to the target folder and click on **OK**.
6. If multiple items result from the search, the Select Folder dialog box opens. Select the folder or folders to add your items to.

Annotating folders

You can add notes to a folder or view notes that other people have added. To add notes, do the following:

1. Open a folder.
2. From the Selected menu, select **Folder Notes**. The Notes window opens.

   You can now type your note much as you would on the Windows Notepad or any other text editor. The client application automatically generates the date and user ID information for you. Your note is appended below the existing notes for the folder.
3. If you want to cancel your note, click **Cancel**.
4. When you are finished, click **OK**. Your note is saved in the note log for the folder.

You can view the note log at any time by following the procedure for adding notes. The Notes window enables you to read the entire note log. When you finish looking at the note log, click on **Cancel**.

You can export the note log when you export a folder. See “Exporting” on page 26 for more information.

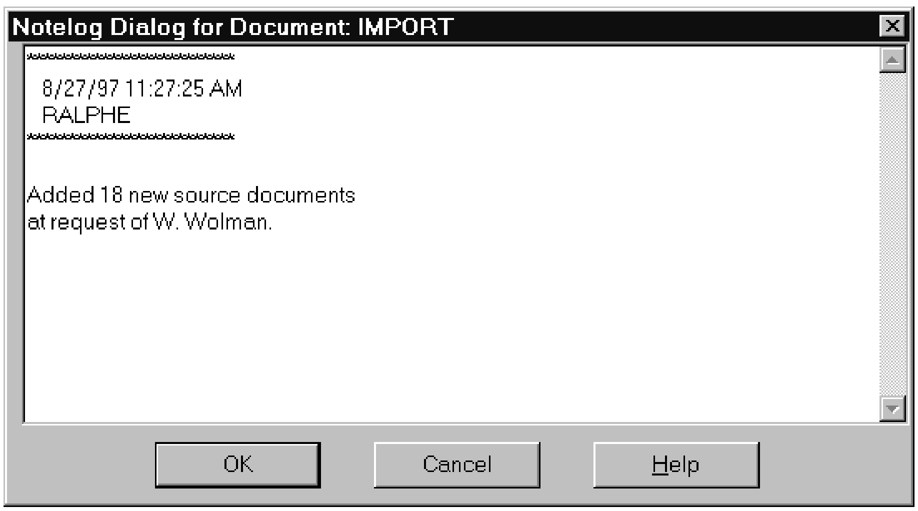


Figure 27. Notes window

Workflows

A workflow is a predefined path that a document or folder follows through a series of workbaskets. When you finish processing a document or folder, you can route the item to the next workbasket in the workflow, move it to another workflow, mark it as completing the workflow, or remove it from the workflow. For example, a typical workflow might include an indexing workbasket, a processor's workbasket, and a reviewer's workbasket. To be assigned to a workflow, a document or folder must meet the following conditions:

- Available for access by your user ID
- Not checked out to another user
- Not currently opened by another user

Note: Workflows are not available with VisualInfo for AS/400.

The **Process** menu option gives you access to a variety of processing commands. You can select **Start Workflow, Change Workflow, Complete Workflow,** or **Remove from Workflow** from the Process menu if you are working with one or more items highlighted in a folder or workbasket. Workflow options from the Process menu apply to all folders and documents highlighted in the TOC window.

You can also select **Start Workflow, Change Workflow, Complete Workflow,** or **Remove from Workflow** from the Process menu if you are working with an open document in the Document window. The workflow options apply only to that single document.

The commands on the Process **Workflow** menus enable you to do the following:

- Start items in a workflow
- Move items to a different workflow
- Complete a workflow for an item
- Remove items from a workflow
- Suspend and reactivate items
- Check items out and in (see “Checking documents and folders out and in” on page 36).
- Assign priorities to items (see “Changing the priority of items in a workbasket” on page 58).

Moving items through workflows

You can start an item in a workflow, change an item's workflow, mark an item as completing a workflow, or remove an item from a workflow. For all of these procedures, select **Start Workflow, Change Workflow, Complete Workflow,** or **Remove from Workflow** from the Process menu .

Starting a workflow

To start a document or folder in a workflow:

1. Select the item.
2. Select **Start Workflow** from the Process menu.
3. Select a workflow from the list of available workflows.
4. To change the priority of the item in the workflow, type a number in the **Priority** field; 1 is the lowest priority you can assign and 31,999 is the highest (for more information, see “Changing the priority of items in a workbasket” on page 58).
5. Click on the **Start** button to start the item in the workflow.

Your system administrator can also automatically start a document or folder in a workflow based on its index class definitions.

If an item is already in a workflow, the **Start Workflow** command is unavailable. Instead, you can transfer the item by using the **Change Workflow** command.

Changing a workflow

To move a document or folder to a different workflow:

1. Select the item.
2. Select **Change Workflow** from the Process menu. The Change Workflow window opens.
3. Select a workflow from the list of available workflows.

4. To change the priority of the item in the workflow, type a number in the **Priority** field; 1 is the lowest priority you can assign and 31,999 is the highest (for more information, see “Changing the priority of items in a workbasket” on page 58).
5. Click on the **Start** button to start the item in the new workflow.

Completing a workflow

You can mark a document or folder as complete before or after it is finished moving through all of the workbaskets in a workflow. You might choose to mark an item as complete if the remaining steps in the workflow are no longer necessary. To mark a document or folder as complete:

1. Select the item.
2. Select **Complete Workflow** from the Process menu. A dialog box opens, asking if you want to remove the selected item(s) from their workbasket(s) when removing them from the workflow environment.
3. Click on **Yes** if you want to remove the selected item from the workbasket.

   Click on **No** if you want the selected item to remain in the workbasket even though it is no longer in the workflow.

Removing documents and folders from a workflow

You can remove a document or folder from the workflow without marking it as complete. You might choose to remove an item that still requires processing, but not the steps that were predefined by the current workflow. To remove a document or folder from the workflow:

1. Select the item.
2. Select **Remove from Workflow** from the Process menu. A dialog box opens, asking if you want to remove the selected item(s) from their workbasket(s) when removing them from the workflow environment.
3. Click on **Yes** if you want to remove the selected item from the workbasket.

   Click on **No** if you want the selected item to remain in the workbasket even though it is no longer in the workflow.

Suspending documents and folders

Suspending a document or folder makes it temporarily unavailable for normal processing. You can suspend a document or folder until a specified date and time. In addition, you can suspend a folder until documents and folders of a selected index class are added to it. You can suspend a document or folder if it meets the following conditions:

- Available for access by your user ID
- Not checked out to another user
- Not currently opened by another user
- Not already suspended

Suspending a document

To suspend a document:

1. Select the document by opening it in a document window or highlighting it in a Table of Contents.
2. From the Process menu, select **Suspend**. The Suspend window opens.

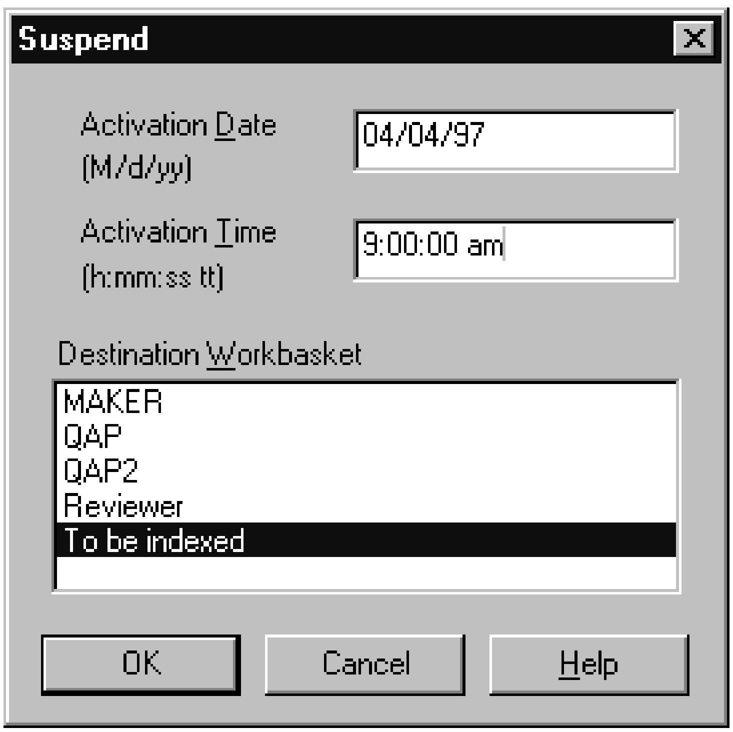


Figure 28. Suspend window

3. Specify the date that you want the document activated in the **Activation date** entry field. This field is required.

   Note: For your convenience, you can enter a two-digit year. However, the Client for Windows assumes that you mean a year in the current century. Therefore, if your activation date is in the next century, you need to enter a four-digit year.

4. Specify the time that you want the document activated in the **Activation time** entry field. This field is required.
5. From the **Destination workbasket** list, select the workbasket where you want to send the document when it is activated. The destination workbasket is optional.
6. Click on **OK**.

Suspending a folder

To suspend a folder until a particular date and time:

1. Select the folder by opening it and clicking on its selection icon, or by highlighting it in a Table of Contents window.
2. From the Process menu, select **Suspend**. This opens the Suspend Folder window.

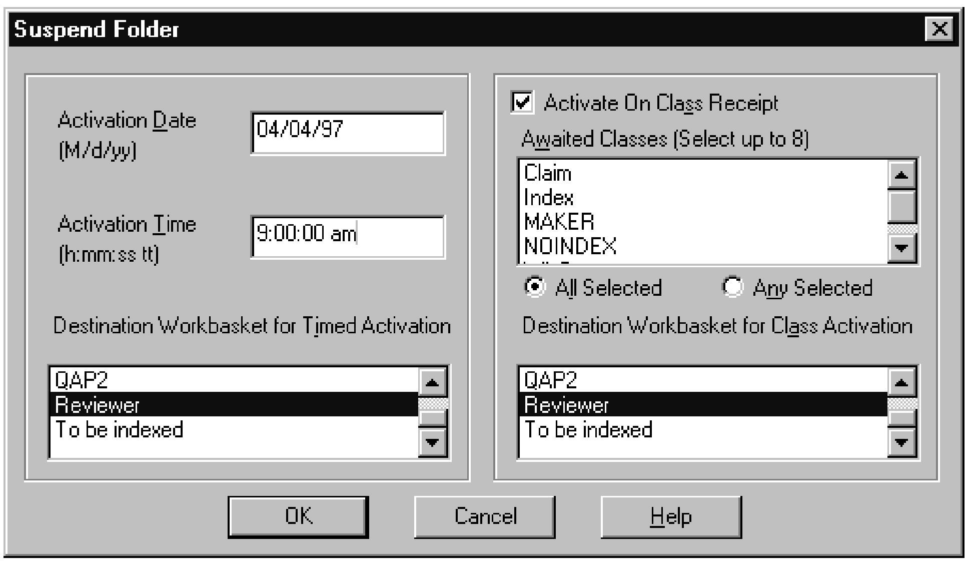


Figure 29. Suspend Folder window

3. Specify the date that you want the folder activated in the **Activation date** entry field. This field is required.

   Note: For your convenience, you can enter a two-digit year. However, the Client for Windows assumes that you mean a year in the current century. Therefore, if your activation date is in the next century, you need to enter a four-digit year.

4. Specify the time when you want the folder activated in the **Activation time** entry field. This field is required.
5. From the **Destination Workbasket for Timed Activation** list, select the workbasket where you want to send the folder when it is activated. The Client for Windows sends the folder to this destination workbasket if the folder is activated because the activation date and time are reached.
6. Click on the **OK** push button.

You can also specify that you want a folder activated if it receives one or more documents belonging to specified index classes. For example, you might want to activate a customer folder and route it to a special workflow if it receives a claim document plus a medical report. To activate a folder on receipt of one or more documents, do the following:

1. On the Suspend Folder window, select the **Activate on Class Receipt** check box.
2. Select one or more index classes from the **Awaited Classes** list. These represent the index classes of the documents or folders that can cause the suspended folder to be reactivated. You can choose up to 8 classes.
3. Choose the **All Selected** or **Any Selected** radio button.
   - **All Selected** means that the suspended folder is reactivated only when it receives documents or folders belonging to all the selected classes.
   - **Any Selected** means that the suspended folder is reactivated if it receives documents or folders belonging to any of the selected classes.
4. From the **Destination Workbasket for Class Activation** list, select the workbasket where you want to send the folder when it is activated. The Client for Windows sends the folder to this destination workbasket if the folder is activated because documents or folders of the required classes are received.
5. Click on the **OK** push button.

The folder is activated when the required documents or folders are received. If they are not received prior to the activation date and time, then the folder is activated at the activation date and time.

Activating a document or folder

To activate a document or folder before its activation date and time:

1. Select the item.
2. From the Process menu, select **Activate**. This activates the document or folder.

Chapter 8. Viewing and annotating documents

This chapter describes viewing and annotating documents. To view or annotate a document, you first need to open it. You can do this in several ways:

- Double-click on a document in a Table of Contents window
- Select a document and click on **Open** from the File menu
- Select a document in a TOC and click the **Open Selected Item** button on the toolbar
- Press Ctrl + O on your keyboard

Note: To view a document, you must have DOC TOC privileges assigned to you. If not, when you try to open a document, it will be opened but not displayed in the window. You will be able to view the document's index values but not the actual document.

Note: You can not view documents whose format is non-interlaced YCbCr.

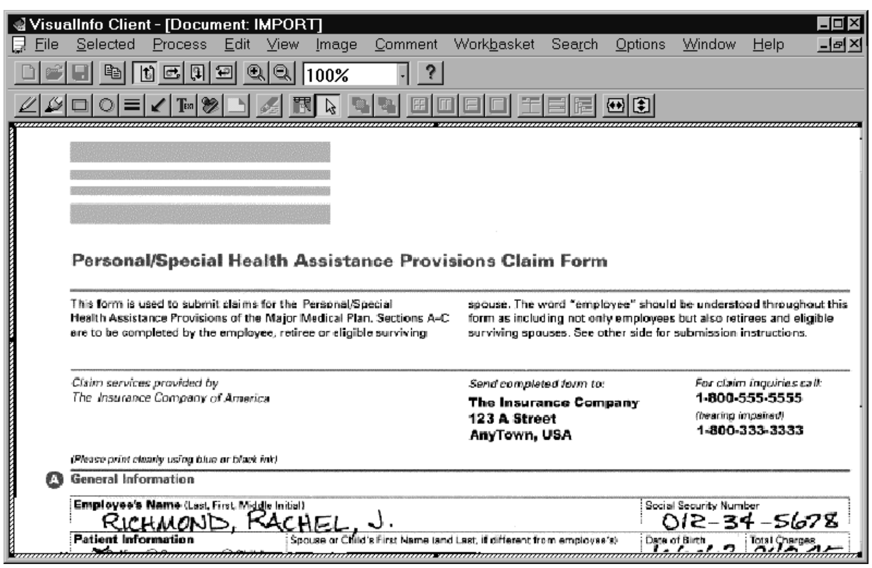


Figure 30. The document window

The document window

The image that you are viewing is contained in a document window that opens inside the Main Window. You can maximize the document window, scroll it, or size it as you would any other window. When a document window is the active window, the Main Window menu bar and tool bar are replaced by a document menu bar and toolbar. In addition, the document window can display a thumbnail bar that gives you small "thumbnail" representations of all the pages of the open document.

You can have multiple document windows open at the same time.

Document menu bar

When a document is open, some of the menus displayed on the Main Window menu bar change. The document menus enable you to change the way you view your document and make annotations on your document. You can index your document from the Selected menu or perform workflow operations from the Process menu. (Workflow operations are also available on documents that are not open.) For details, see "Main Window menus" on page 9.

Document toolbars

The document toolbars display below the menu bar. They enable you to perform actions by clicking on representative buttons. These provide a quick way for you to access the commands that you use most frequently from the View menu and Comment menu.

Two document toolbars are available. The Document Bar enables you to do things such as rotate the document pages and zoom in on the document. (See "Viewing a document" on page 69.) The Comment Bar enables you to add annotations to the document such as notes or highlights. (See "Annotating documents" on page 72.)

You can show or hide the toolbars by selecting the View menu and clicking **Document Bar** or **Comment Bar**.

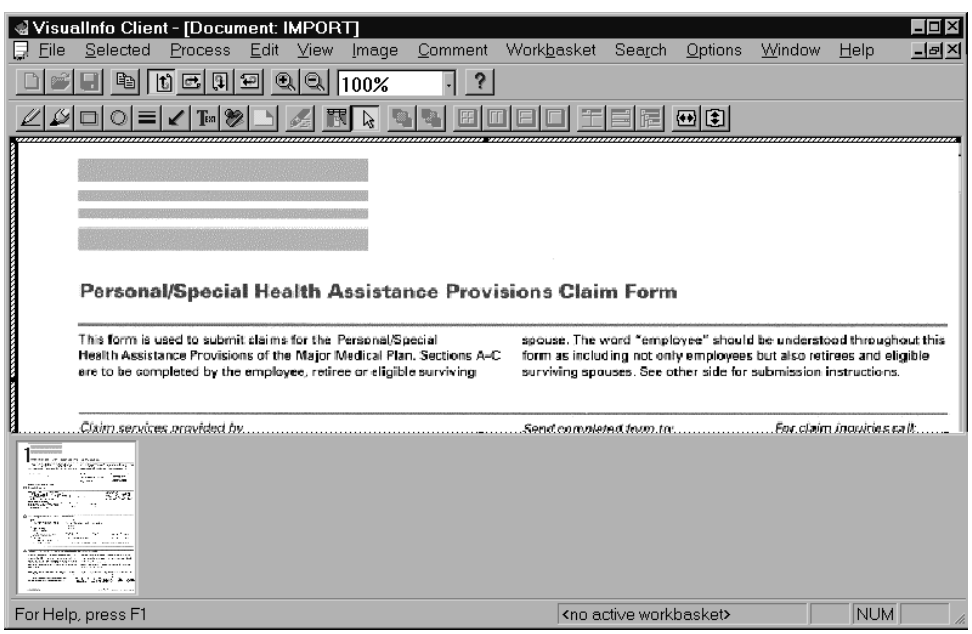


Figure 31. Document with thumbnail bar

Thumbnail bar

The thumbnail bar enables you to preview all the pages of the open document. Figure 31 on page 68 shows a document with the thumbnail bar displayed. You can move quickly to a page you want to view by clicking on its thumbnail. You can show or hide the thumbnail bar selecting the Options menu and clicking **Thumbnail Bar.**

Viewing a document

You can open a document using any of the methods described on page 67. When you open a document, the first page is automatically displayed.

You can also open a document in Browse mode. Select the document in a Table of Contents. Then choose **Browse** from the File menu. When you browse a document, you can view it but you cannot index or delete it. In addition, you can view annotations, but you cannot add, delete, or edit them.

The following sections describe features that help make it easy to work with your documents.

- Moving between pages
- Rotating a page
- Enhancing an image
- Inverting an image
- Fitting pages
- Zooming

The rotate, enhance, and invert functions are not available for non-image documents

Moving between pages

Once you have opened a document, you can use the commands on the View menu to easily move between the pages of your document:

Go to Page

When you have opened a document and know the number of the page you want to view, you can use the **Go to Page** command. In the Go To Page dialog box, type the page number of the page you want to display.

You can also bring up the Go To Page dialog box by pressing the Ctrl+G shortcut keys.

Previous Page

Use this command to go to the page before the one you are viewing. You can also move to the previous page by using the Page Up key.

Next Page

Use this command to go to the page after the one you are viewing. You can also go to the next page by using the Page Down key.

First Page

Use this command to go to the first page in the document you are viewing. You can also go to the first page by using the Home key.

Last Page

Use this command to go to the last page in the document you are viewing. You can also go to the last page by using the End key.

Rotating a page

Under some circumstances you might want to rotate the page you are viewing. Examples are a page that has been inadvertently scanned upside down or a newspaper clipping that could only fit through the scanner by turning the clipping 90 degrees.

When you rotate a page, it is only rotated for the current viewing session.

To rotate a page, first click on the page you want to rotate. Then do one of the following:

- Click on the appropriate Toolbar Button
- Press the * key on the numeric keypad to rotate the page clockwise
- Press the / key on the numeric keypad to rotate the page counterclockwise
- From the View menu, select **Clockwise** or **Counterclockwise**

Enhancing an image

Select **Enhance** from the Image menu to improve the quality of the document image. A checkmark appears next to the Enhance menu item to indicate that you are in enhanced mode. All subsequent documents are automatically displayed in enhanced mode until you turn off the Enhance option by clicking on **Enhance** again.

The Enhance option does not apply to non-image formats such as ASCII or word processor data formats. Therefore, a checkmark does not appear next to the Enhance menu item when you view these kinds of documents.

The Enhance option affects the display of the document and does not change the stored document itself.

Note: Initially presenting an image in enhanced mode can increase the amount of time required to display the document.

Inverting an image

The **Invert** command reverses the bi-tonal (black and white) areas of a page for the current viewing session. Sometimes documents are more legible if the black and white parts of a page are reversed. This is especially true if light type is used on a dark background. Also, many OCR engines are unable to interpret white text.

To invert an image:

1. Open the document that contains the page you want to invert.
2. Select the page.
3. From the Image menu, select **Invert**.

Fitting pages

There are a variety of options for fitting pages in the window or a windowpane. Pages you view in the client application can be of different sizes because original documents can have different sizes or be scanned in different resolutions. You can fit pages to your window by using commands from the **Fit** option of the View menu.

Normal
The Normal command prevents page size from changing when the window size is changed.

Page Width
The Page Width command sizes a page so that the left and right edges of the page fit the borders of the window. You can also click on the Page Width toolbar button.

Page Length
The Page Length command sizes a page so that the top and bottom edges of the page fit the borders of the window. You can also click on the Page Length toolbar button.

Page Fit Within
The Page Fit Within command sizes a page so that the entire page fits within the window. When Page Fit Within is selected, you can rotate the page or resize the window and the entire page will always remain in view.

Window Width
The Window Width command sizes a page so that the left and right window borders contact the edges of the page.

Window Length
The Window Length command sizes a page so that the top and bottom window borders contact the edges of the page.

Zooming

Zooming means enlarging or reducing the page you are viewing. You can change the size of a displayed page with the Toolbar, the keyboard, or the menus.

Zooming with the toolbar

You can use the toolbar to change the zoom of a display in the following three ways:

- Click on the Zoom In button to enlarge the page display.
- Click on the Zoom Out button to reduce the page display.
- Select a size or enter a value in the Zoom To option box.

Zooming with the keyboard

You can use the keyboard keypad to change the zoom of a display in the following ways:

- Press + on the keypad to enlarge the page display.
- Press - on the keypad to reduce the page display.

Zooming with menus

You can use the menus to change the zoom of a display by the following methods.

To use the Zoom menu commands:

1. Click on the View menu.
2. Click on **Zoom In** or **Zoom Out**.

To use the Zoom dialog box:

1. Click on the View menu.
2. Click on the Zoom To option.
3. In the Zoom dialog box, select the zoom percentage you want. Use the up and down arrow keys to increase or decrease the percentage.

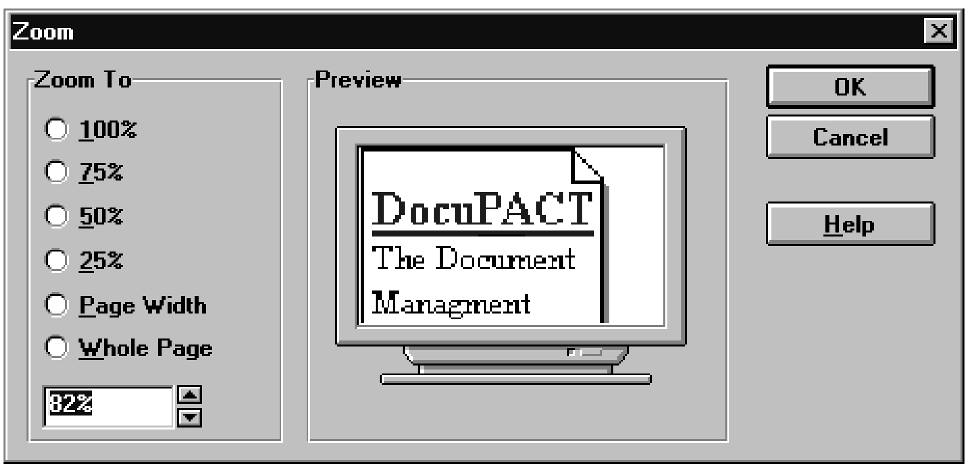


Figure 32. Zoom dialog box

Annotating documents

Annotations are comments and marks that you can use to call attention to certain areas of a document or to record important information. The annotations you create are not inserted into the document, but are placed on a layer above the document. This process enables you to work with a document without losing the integrity of the original.

To understand this process, think of a paper document. Now imagine a sheet of glass placed over the document. When you annotate the document, it is like writing on the glass; it looks like you are writing on the original, but the original is unchanged.

The annotation tools

A wide variety of tools are available for you to annotate your documents in different ways. You can access these tools from the Comment toolbar or the Comment menu:

- Pen
- Highlighter
- Box
- Circle
- Line
- Arrow
- Text
- Stamp
- Note

The following sections describe the annotation tools and show their toolbar buttons.

You can also move your annotations or change their appearance. For detailed information, see “Working with annotations” on page 77 and “Changing the properties of annotations” on page 80. If you want to use an annotation tool without having to reselect it each time, right mouse click on your document to display the pop-up menu, and choose **Keep Selected**.

Pen

The Pen tool enables you to annotate your document by drawing free-form lines.

1. Click the Pen button on the toolbar or select Pen from the Comment menu.
2. Use your mouse to position the cursor where you want to start drawing.
3. Hold down the left mouse button.
4. Use the cursor like a pen to create a line over your document
5. Release the left mouse button when you want to end the line.
6. Use the pen property sheet to change your lines’ width, color, transparency, or other properties.
7. Repeat this procedure for each line you want to draw.

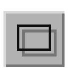
Highlighter

The Highlight tool enables you to mark parts of your document with rectangular highlights of different colors and sizes.

Highlights work best with high-contrast images like black and white, because the highlight colors were chosen for their transparency. Highlights can be difficult to see on color or grayscale documents, particularly if the portion of the image underneath the highlight is dark.

1. Click on the Highlighter button on the toolbar or select **Highlighter** from the Comment menu.
2. Use your mouse to position the cursor where you want to highlight.
3. Hold down the left mouse button.
4. Move the cursor over the area you want to highlight.
5. Release the left mouse button when you want to end the highlight.
6. Use the highlight's property sheet to change its size, color, transparency, or other properties.
7. Repeat this procedure for each highlight you want to draw.

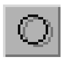
Box



The Box tool enables you to draw a rectangular box around portions of your document.

1. Click the Box button on the toolbar or select Box from the Comment menu.
2. Use your mouse to position the cursor at one corner of the area you want to enclose with a box.
3. Hold down the left mouse button.
4. Move the cursor over the area you want to enclose.
5. Release the left mouse button where you want to place the opposite corner of the box.
6. Use the box's property sheet to change its width, height, color, transparency, or other properties.
7. Repeat this procedure for each box you want to draw.

Circle



The Circle tool enables you to draw a circle or oval around portions of your document.

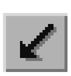
1. Click the Circle button on the toolbar or select Circle from the Comment menu.
2. Use your mouse to position the cursor at one corner of the area you want to surround with a circle or oval.
3. Hold down the left mouse button.
4. Move the cursor over the area you want to enclose. Your cursor movements define a bounding box that contains the circle or oval you are creating.
5. Release the left mouse button when your circle or oval is the right size and shape.
6. Use the circle or oval's property sheet to change its width, color, transparency, or other properties.
7. Repeat this procedure for each circle or oval you want to draw.

Line

The Line tool enables you to draw a line between any two points on your document.

1. Click the Line button on the toolbar or select Line from the Comment menu.
2. Use your mouse to position the cursor at the starting point for your line.
3. Hold down the left mouse button.
4. Move the cursor to the end point for your line.
5. Release the left mouse button.
6. Use the line's property sheet to change its width, color, transparency, or other properties.
7. Repeat this procedure for each line you want to draw.

Arrow

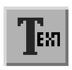


The Arrow tool enables you to draw an arrow at any location on your document.

1. Click the Arrow button on the toolbar or select Arrow from the Comment menu.
2. Use your mouse to position the cursor where you want the back end of your arrow.
3. Hold down the left mouse button.
4. Move the cursor to where you want the point of your arrow.
5. Release the left mouse button when the arrow is in the right position.

6. Use the arrow's property sheet to change its color or transparency, the size and shape of its head, or other properties.
7. Repeat this procedure for each arrow you want to draw.

Text



The Text tool enables you to create text at any point on your document. Text annotations differ from note annotations. Text annotations lie directly over your document, while notes are contained in a rectangle similar to a "sticky note."

1. Click the Text button on the toolbar or select Text from the Comment menu.
2. Use your mouse to position the cursor where you want your text annotation to begin.
3. Type your text as you would with a word processor.
4. When you have finished the text, click elsewhere on the document or press Enter to indicate that you have finished.
5. Use the text annotation's property sheet to change its font size and style, color, transparency, or other properties.
6. Repeat this procedure for each text annotation you want to add.

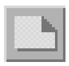
Stamp

The Stamp tool enables you to create an annotation similar to a "rubber stamp" at any point on your document. You can design your own stamp by opening the property sheet for a new or existing stamp annotation, changing its text and other properties, and clicking the **Save** button. This adds your new stamp to the list of choices that display whenever you create a stamp annotation.

1. Click the Stamp button on the toolbar or select **Stamp** from the Comment menu.
2. Use your mouse to position the cursor at the upper left corner of the area where you want the stamp.
3. Click the left mouse button. This opens a list of available stamps.
4. Double-click on the name of the stamp you want to use. The stamp is placed on your document.
5. Use the stamp's property sheet to change its text, color, transparency, border width, border angle, or other properties. To change the size of a stamp, change its font size.

   If you want to save your changes as a new stamp, click **Save**.
6. Repeat this procedure for each stamp you want to use.

Notes



The Note tool enables you to attach a note of any size to any location on your document. When you are working within a note, you can enter text as you would with a standard text editor. Note annotations differ from text annotations. Notes are contained in a rectangle similar to a "sticky note," while text annotations lie directly over your document.

1. Click on the Note button on the Comment toolbar or select **Note** from the Comment menu.
2. Click at the place on the document where you want the note to appear.
3. Type your text into the note. You can use standard text editor functions such as text selection, deleting, and cursor placement.
4. To create another note, click anywhere on the document outside the first note.
5. When you are finished creating notes, do one of the following:
   - Click the Note button on the toolbar
   - Select **Note** from the Comment menu
   - Press Alt + F4 on your keyboard

Working with annotations

The VisualInfo Client for Windows gives you several tools for working with the annotations that you add to your documents. Some of your options are: showing, selecting, deleting, erasing, bringing to front, and sending to back.

Showing and hiding annotations

You can choose to display or hide annotations when you display a document. You can toggle between hidden and displayed in three ways:

- Click the Show/Hide button on the Document toolbar.

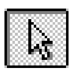
  

- From the Comments menu, select **Show Comments**.
- Click anywhere on the document and then click on the right mouse button to open a pop-up menu. Select **Comments**, then select **Show Comments**.

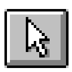
Selecting annotations

The Selection toolbar button has two positions: lowered and raised. Lowered is the select position; raised is the deselect position.

Select position (lowered)



Deselect position (raised)



When this button is lowered or in the select position, clicking with the left mouse button on an annotation will select it. When this button is raised or in the deselect position, clicking with the left mouse button on an annotation will select the document under it.

Changing the size of annotations

Any time after you create an annotation, you can change its size.

1. Make sure the selection button is in the down (select) position.
2. Click with the left mouse button on the annotation you want to resize. A sizing box appears around the annotation.
3. Move the cursor over the sizing handles until the cursor becomes a double-headed arrow symbol. The sizing handles are at the corners and the middle of each side.

   For most annotations, you can use any of the sizing handles. However, for notes, you can only use the sizing handles on the right and bottom sides of the box.

   For stamps, the only way to change the size is to change the size of the stamp's font on its property sheet.
4. Hold down the left mouse button and move the mouse to drag the sizing handle. Dragging on a handle at a corner resizes the entire box. Dragging on a handle in the middle of a side moves that side only.

Changing the location of annotations

You can also change the location of an annotation at any time.

1. Make sure the selection button is in the down (select) position.
2. Click with the left mouse button on the annotation you want to move. A sizing box appears around it.
3. Move the cursor into the sizing box, so that the cursor becomes a crossed arrows symbol.
4. Hold down the left mouse button and move the cursor to drag the annotation.

Deleting annotations

You can quickly delete annotations.

To delete a single item:

1. Make sure the Selection button is in the select (lowered) position.
2. Click on the annotation to be deleted. A sizing box should appear around it.
3. Press the Delete key or choose **Delete Selected** from the Comment menu.

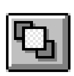
To delete multiple items:

1. Select **Eraser** from the Comment menu, or click on the Eraser toolbar button.
2. Place the cursor cross-hairs over the annotation you want to erase.
3. Click with the left mouse button. The item is deleted.
4. Repeat this procedure for each item you want to delete.
5. To end the Erase mode, click the Erase button to deselect it.

Bringing to the front

When you have several overlapping annotations, you can use the **Bring to Front** command to put one in front of the others.

1. Make sure the selection button is in the down (select) position.
2. Click to select the item you want to place in front. When you select an item, a sizing box appears around it.
3. Select the **Bring to Front** command from the Comment menu, or click on the Bring to Front button.

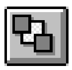
   

   If you have three or more overlapping items, **Bring to Front** moves the selected item forward by one layer. To move the selected item all the way to the front, hold the Ctrl key while clicking the Bring to Front button.
4. Click elsewhere on the screen to deselect the item.

Sending to the back

When you have several overlapping annotations, you can use the **Send to Back** command to put one behind the others. This command is useful when you have one item completely covering another and you want to select the lower one. By sending the top item to the back, you can select the item you want.

1. Make sure the select button is in the down (select) position.
2. Click to select the item you want to send to the back. When you select an item, a sizing box appears around it.
3. Select the **Send to Back** command from the Comment menu, or click on the Send to Back button.



If you have three or more overlapping items, **Send to Back** moves the selected item backward by one layer. To move the selected item all the way to the back, hold the Ctrl key while clicking the Send to Back button.

4. Click elsewhere on the screen to deselect the item.

Changing the properties of annotations

After you have made an annotation, you can change the color, width, and other properties of the mark. You make these changes with the annotation's Property Sheet.

Note: Changes to an annotation's font, color, or transparency are not necessarily retained when you end your current viewing session.

To change the properties of an annotation:

1. Make sure the selection button is in the down (select) position. If not, click on the button.
2. Select the annotation you want to change, then do either of the following:
   - Select **Property Sheet** from the Comment menu.
   - Click with the right mouse button on the annotation to open its pop-up menu. From the pop-up menu, select **Property Sheet**.
3. On the property sheet, select the properties you want.
   - To see through your annotations to the underlying document, check the **Transparent** option.
   - To reduce the time required to process marks, uncheck **Draw While Moving** and **Apply Now**.

     When **Draw While Moving** is checked, your annotations will be redrawn continuously while you create, move, or resize them. We recommend that you leave this option unchecked.

     When **Apply Now** is checked, property changes you make will affect your notes immediately. When **Apply Now** is unchecked, property changes you make will not change your marks until you click **OK**.
   - To change the color of your annotations, click on the button beside the color box, click on a color in the Color dialog box, and click **OK**. You can select one of the predefined colors or define a custom color.
   - Select other properties that are specific to the type of annotation you are working with.
4. If you want your property selections to be the default properties for future annotations, click on the **Set Default** button.
5. When you are done, click **OK**.

The property sheet also includes an object name. This is a unique identifier that the system assigns to your annotation. You cannot change the object name.

Viewing non-image documents

Non-image documents are documents that are not stored in a graphic format. These include ASCII documents, word processor documents, and spreadsheets. You can view and manipulate non-image documents in the same way as image documents (with certain restrictions). You can also launch a non-image viewer from the Client for Windows.

Using the document viewer with non-image documents

You can open a document window for non-image documents in the same way as you would for image documents. However, you need to be aware of certain restrictions that apply to viewing non-image documents:

- Annotations made with a VisualInfo client on one operating system do not necessarily appear in the same position when you display the document on a different operating system. This is because the displayed and printed presentations of non-image documents can differ from one operating platform to another.
- When you print a non-image document, annotations do not necessarily appear in the same place on the printed version of the document as on the displayed version.
- The enhanced image mode does not work on non-image documents. (See“Enhancing an image” on page 70 .)
- When you initially display an ASCII document, text lines can appear to overlap. To correct this, zoom in on the document by pressing the + key or using the **Zoom In** command from the View menu. (See “Zooming” on page 71.)

Using a non-image viewer

You can launch a non-image viewer from the Client for Windows. You need a non-image viewer to view non-image documents containing DBCS characters, such as Japanese, Chinese, or Korean text documents.

Any changes you make while viewing the document in the non-image viewer will not be saved. In addition, you must manually close the non-image viewer application. The Client for Windows does not close the this application when you close the document from the File menu.

Configuring the VIC.INI file for a non-image viewer

Before using a non-image viewer program, add an entry for the program to the VIC.INI file, located in the \WINDOWS subdirectory for Windows 95 and 3.1, and in the appropriate \WINNT subdirectory for Windows NT. Use the following format for your entry:

```
[Content Classes]
{CCName}={ext}, {Program Name} {Optional Parameters}
```

where{CCName} = the content class name. This is the same name used to define the "External Data Format" in the VisualInfo System Administration program. {CCName} is not case sensitive.

{ext} = the 3–character extension expected by the non-image viewer program.

Note: The comma is required after {ext}.

{Program Name} = the location (path and file name) of the non-image viewer program.

{Optional Parameters} = any additional parameters for the non-image viewer.

For example, to configure the VIC.INI file for using Microsoft Word, you might use the following entry:

```
[Content Classes]
msword=doc, c:\msoffice\word.exe
```

Launching a non-image viewer

For a non-image viewer program to work correctly with the Client for Windows, you must be able to launch the program from the command line using a command in the following form:

```
{Program Name}  {Optional Parameters}  {filename}.{ext}
```

where {filename} is the name of the file you want to view in the non-image viewer, and {Program Name}, {Optional Parameters}, and {ext} are the values you defined in the VIC.INI file.

For example, to use the Client for Windows to open a file named sample.doc in Microsoft Word, you might use the following command:

```
c:\msoffice\word.exe  sample.doc
```

Note:

The VisualInfo Client for Windows pre-appends the document file path with a space. This makes it possible for an external application to parse the document file path parameter in an unexpected manner.

For example, consider the following VIC.INI entry:

```
WWW_HTML_DOC=htm, c:\webviewer\webview.exe  file:///
```

To open a file based on this entry, you might use the command

```
c:\webviewer\webview.exe  file:/// c:\frnroot\work\doc0001.htm
```

which would launch a Web browser with the following URL:

```
file:/// c:\frnroot\work\doc0001.htm
```

The Client for Windows pre-appends a space in front of the filepath even though the browser application is not expecting a space there.

Chapter 9. Printing documents

With the Client for Windows, you can print any document from a Table of Contents or you can print one that is open in a document window. You can also print an entire Table of Contents or all the documents contained in a folder. You select options for printing on the Print Item window.

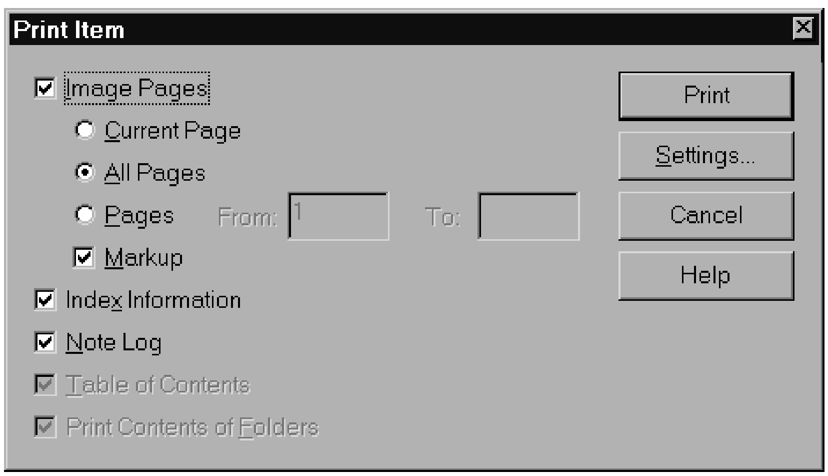


Figure 33. Print Item Window

When you print a document, you can print any annotations, index information, or note logs that are associated with it, and you can print selected pages.

When you print a folder, you can choose to print its contents in full, a listing of its Table of Contents, or both. Sometimes folders are nested: a folder itself contains folders, these folders can likewise contain folders, and so on. Each level is called a *recursion.* You can set a default recursion level for printing in the Operator Preferences window. (See "Options and preferences" on page 15.) The recursion level indicates how deeply the Client for Windows will "dig" into a nested folder structure to find documents to print.

To print a document or folder:

1. Do one of the following:
   - Select a document in a TOC window
   - Open a document
2. Then do one of the following:
   - Select **Print** from the File menu
   - Click on the Tool Bar button that shows the printer

   The Print Item window opens.
3. If you are printing a document, select one or more of the following options:

- **Image Pages**
- **Index Information**
- **Note Log**

Select **Current Page**, **All Pages**, or enter a range of pages.

If you want to print annotations with your document, select **Markup**.

4. If you are printing a folder, select one or both of the following options:
   - **Table of Contents**
   - **Print Contents of Folder**

To change your printer setup:

Use the two Page Setup windows to select a printer and set paper size, orientation, and other print properties. You can use any printer on your network.

1. From the Print Item window, click the **Settings** button. This opens the first Page Setup window.
2. Select your paper source, size, and orientation.
3. Click the **Printer** button. This opens the second Page Setup window.
4. Set the printer you want to use.
5. Click the **Properties** button. This opens the Properties window.
6. Select the properties you want for your printer. Options vary with the printer selected.

Glossary of Terms and Abbreviations

This glossary defines terms and abbreviations specific to the VisualInfo system. Terms used in the definitions that are shown in *italics* are defined elsewhere in this glossary.

A

access control. The ability to limit access to certain functions provided by the VisualInfo system and certain objects stored in the system. For example, you can give a user read-only access to an object through an *access list*.

access list. A list consisting of one or more individual user IDs or user groups and the *privilege set* associated with each user ID or user group. You use access lists to control user access to objects in the VisualInfo system. The objects that can be associated with access lists are the data objects stored by users, *index classes* and subsets, *workbaskets*, and *workflows*.

ADSM. AdStar storage management

ADSM management class. A logical area of storage that is managed by *ADSM*.

API. Application programming interface.

archive. Persistent storage used for long-term information retention, typically very inexpensive per unit stored, but requiring a long response time. Often in a different geographic location to protect against equipment failures and natural disasters.

attribute. The term used in the VisualInfo APIs for *key field*.

B

base attributes. A set of item indexes that is assigned to each object. All VisualInfo objects have base attributes, also known as *key values*.

binary large object (BLOB). A large stream of binary data treated as a single object.

C

cache. An area of storage used to temporarily store objects on the client machine. See also *object server cache* and *LAN cache*.

category. Another term for *index class*. In the Dynamic Page Builder sample application, it is the name of a list box that contains index classes for collections of magazine articles.

CIF. *Common interchange file*.

CIU. *Common interchange unit*.

client application. An application written with the VisualInfo APIs to customize a user interface.

collection. A group of objects with a similar set of management rules and contained within a *storage group*. Every object is stored in a collection, and all objects in a collection are stored in the same *storage group*.

common interchange file (CIF). A file that contains one ImagePlus Interchange Architecture (IPIA) data stream.

common interchange unit (CIU). The independent unit of transfer for a common interchange file (CIF). It is the part of the CIF that identifies the relationship to the receiving database. A CIF may contain multiple CIUs.

configuration server. An OS/2 component of VisualInfo that acts as an interface between OS/2 clients and the other components of VisualInfo. Each configuration server stores profile information about each client that links to it.

container. In the *folder manager*, an object that can contain other folders or documents.

content class. The term used in the VisualInfo APIs for *data format*.

custom system. A tailored configuration of a VisualInfo system that includes two or more nodes installed on a local area network (LAN).

D

data format. A logical name assigned to a file type. VisualInfo provides a large range of predefined data formats. You can also define your own data format. For example, you can define your own data format called MYGIF and use it for GIF files. Referred to as *content class* in the VisualInfo APIs.

DCA. *Document content architecture*.

destager. A function of the object server that moves objects from the *staging area* to the first step in the object's *migration policy* or *management class*.

document. An object that can be stored, retrieved, and exchanged among VisualInfo systems and users as a separate unit. Also referred to as an *object*. A single document can contain many different types of base parts, including text, images, and objects such as spreadsheet files.

document content architecture (DCA). An architecture that guarantees information integrity for a document being interchanged in an office system network. DCA provides the rule for specifying form and meaning of a document. It defines revisable form text (changeable) and final form text (unchangeable).

E

element. An *object* that the list manager allocates for an application.

F

FFST. *First Failure Support Technology*.

filesystem. In AIX, the method of partitioning a hard drive for storage.

First Failure Support Technology (FFST). An IBM licensed program that improves availability for IBM software applications by providing immediate event notification and first failure data capture for software events, and by automating event tracking and management.

folder. In VisualInfo, an object that can contain other folders or documents. A folder can contain items with specified key field values or items that are the results of a search. Folders are represented by their *table of contents*.

folder manager. The VisualInfo data model for managing digital objects as online documents and folders. You can use the folder manager APIs as the primary interface between your applications and the VisualInfo data store.

H

handle. A character string that represents an object, and is used to retrieve the object.

history log. A file that keeps a record of activities for a workflow.

I

Image Object Content Architecture (IOCA). A collection of constructs used to interchange and present images.

index class. A category for storing and retrieving objects, consisting of a named set of attributes known as *key fields*. When you create a document or folder in the VisualInfo system, your application must assign an index class and supply the key field values required by that class. An index class identifies the automatic processing requirements and storage requirements for an object.

index class subset. A view of an *index class* that an application uses to store, retrieve, and display folders and objects. An index class subset usually contains a subset of the index class's key fields.

index class view. The term used in the APIs for *index class subset*.

inline. In VisualInfo, an object that is online and in a drive, but has no active mounts. Contrast with *mounted*.

interchange. The capability to import or export an image along with its index from one ImagePlus system to another ImagePlus system using CIF or CIU.

item. The smallest unit of information that the library server administers. An item can be a folder, document, workbasket, or workflow.

K

key field. An attribute of a document or folder that represents a type of information about that item. For example, a customer data document might have key fields for the customer's name and social security number.

L

LAN cache. An area of temporary storage on a local *object server* that contains a copy of objects stored on a remote object server.

library client. The component of a VisualInfo system that provides a low-level programming interface for the library system. The library client includes APIs that are part of the Application Development Toolkit.

library object. A *folder*, *document*, or *workbasket*. Library objects are stored on the *library server*.

library server. The component of a VisualInfo system that contains index information for the objects stored on one or more *object servers*.

list manager. An OS/2 component in a VisualInfo system that can control workstation *cache*. The list manager server manages electronic queues (called lists) for the clients that link to it. The *configuration server* is a type of list manager server.

M

machine-generated data structure (MGDS). (1) An IBM structured data format protocol for passing character data among the various ImagePlus programs. (2) Data extracted from an image and put into generalized data stream (GDS) format.

management class. A user-defined schedule for moving objects from one *storage class* to the next. It describes the retention and class transition characteristics for a group of objects in a storage hierarchy. Also known as *migration policy*.

MGDS. Machine-generated data structure.

migration. (1) The process of moving data and source from one computer system to another computer system without converting the data, such as when moving to a new operating environment. (2) Installation of a new version or release of a program to replace an earlier version or release.

migration policy. Synonym for *management class*.

migrator. A function of the object server that checks *management classes* and moves objects to the next *storage class* when they are scheduled to move.

Mixed Object Document Content Architecture (MO:DCA). An IBM architecture developed to allow the interchange of object data among applications within the interchange environment and among environments.

Mixed Object Document Content Architecture—Presentation (MO:DCA—P). A subset architecture of MO:DCA that is used as an envelope to contain documents that are sent to the ImagePlus workstation for displaying or printing.

MO:DCA. *Mixed Object Document Content Architecture*.

MO:DCA—P. *Mixed Object Document Content Architecture—Presentation*.

mount. To place a data medium in a position to operate.

mounted. In VisualInfo, an object that is online and in a drive, with active mounts. Contrast with *inline*.

N

network table file. A text file created during installation that contains the system-specific configuration information for each node in a VisualInfo system. Each node must have a network table file that identifies it and lists the nodes that it connects to. The name of the network table is always FRNOLNT.TBL.

O

object. Any binary data entity stored on an object server. In the *folder manager* data model, *object* specifically refers to a document's contents or base parts. See also *binary large object (BLOB)*.

object server. The component of a VisualInfo system that physically stores the objects or information stored and accessed by the client applications.

object server cache. The working storage area for the *object server*. Also called the *staging area*.

OLE. Object Linking and Embedding. A Microsoft specification for linking and embedding applications so that they can be activated from within other applications.

overlay. A collection of predefined data such as lines, shading, text, boxes, or logos, that can be merged with variable data on a page while printing.

P

patron. The term used in the VisualInfo APIs for *user*.

privilege. An authorization for a user to either access or perform certain tasks on objects stored in the VisualInfo system. Privileges are assigned by the system administrator.

privilege set. A collection of *privileges* for working with system components and functions. The system administrator assigns privilege sets to users (user IDs) and user groups.

property. A characteristic of an object that can be changed or modified. The properties of an object describe the object. Type style is an example of a property.

purger. A function of the *object server* that removes objects from the system.

R

render. To take data that is not typically image-oriented and depict or display it as an image. In VisualInfo, word-processing documents can be rendered as images for display purposes.

S

search criteria. In VisualInfo, values typed into key fields that are used to retrieve a stored item.

SMS. *System-managed storage*.

SMS server. A VisualInfo object server component used to support the administration of the object server. See also *object server, system-managed storage*.

Software developers toolkit. A set of application programming interfaces that you can use to build custom VisualInfo applications. The toolkit includes APIs for the folder manager and the library client.

staging. The process of moving a stored object from an offline or low-priority device back to an online or higher priority device, usually on demand of the system or on request of a user. When a user requests an object stored in permanent storage, a working copy is written to the *staging area*.

staging area. The working storage area for the *object server*. Also referred to as *object server cache*.

stand-alone system. A preconfigured VisualInfo system with all of the system components installed on a single personal computer.

storage class. A named list of storage attributes. The list of attributes identifies a storage service level provided for data associated with the storage class. No physical storage is directly associated with a given storage class name. However, device drivers are associated with the storage class, and *storage groups* are used with a storage class to define the physical storage.

storage class identifier. The identifier associated with a storage class. This identifier is assigned by the VisualInfo system, not by the user.

storage group. A named collection of physical devices managed as a single storage area for objects. You use a storage group to define a category in which to store groups of objects. A storage group is used to limit a *storage class*.

Storage groups are defined during initial installation of a VisualInfo system, during customization, or dynamically by a run-time function.

storage group identifier. The identifier associated with a storage group. This identifier is assigned by the VisualInfo system, not by the user.

storage system. A generic term for storage in the VisualInfo system. See *ADSM management class*, *volume*

suspend. In VisualInfo, to remove an object from its workflow and define the suspension criteria needed to activate it. Activating the object later enables it to continue processing.

system-managed storage (SMS). The VisualInfo approach to storage management. The system determines object placement, and automatically manages object backup, movement, space, and security.

T

table of contents (TOC). In VisualInfo, the list of objects contained in a folder or workbasket. Search results are displayed as a folder table of contents.

thumbnail. A small representation of a document page. In the VisualInfo Client for Windows, an optional thumbnail bar displays the pages of the active document.

TOC. Table of contents

U

user. A person who requires the services of VisualInfo. This term generally refers to users of client applications, rather than the developers of applications, who use the VisualInfo APIs. See also *patron*.

user group. A group consisting of one or more individual user IDs defined under a single group name. A user group can be assigned a single *privilege set*.

utility server. A VisualInfo component used by the database utilities for scheduling purposes. You configure a utility server when you configure an *object server* or *library server*. There is one utility server for each object server and each library server. Also known as database interface server or reorg server.

V

volume. A representation of an actual physical storage device or unit that the objects in your system are stored on.

W

workbasket. A logical location in the VisualInfo system to which objects can be assigned to wait for further processing. A workbasket definition includes the rules that govern the presentation, status, and security of its contents.

workflow. A sequence of *workbaskets* that a document or folder travels through while it is being processed.

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Version 2 Release 3

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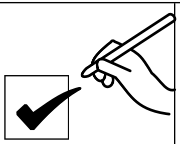	Very Satis-fied	Satis-fied	Neither Satis-fied nor Dissatis-fied	Dissat-isfied	Very Dissat-isfied	No Opinion

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