

*enaio*<sup>®</sup>

Software Documentation  
enaio<sup>®</sup> client

Version 8.50

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# Introduction

## About the Manual

This handbook is available as PDF file and as online help.

You can read the PDF file on the screen with Acrobat Reader, print it completely or in part, and search it quickly for terms.

Either use the ribbon or press the F1 key to open the online help tool on your desktop and search for any required topic.

All enaio® components follow the conventions of the user interface of the desktop. We assume that you are familiar with these conventions, especially with regard to handling windows and selecting files.

In this manual, actions are primarily described based on mouse operation. However, all actions can also be performed with the keyboard. Again, enaio® follows the conventions of Microsoft. Use **Alt** plus the underlined letters in the menu. You can find further shortcuts in the section 'Key Assignment for the Document Display Window'.

Due to its modular design, enaio® can be extensively customized to meet your specific work requirements. This may mean that some descriptions in this handbook remain very general, referring you to other handbooks for further detail. Also, some of the features described in this handbook may not be set up in your installation.

Occasionally, the handbook refers to the administrator. The administrator configures the security system of enaio®. They add users and assign them their initial passwords. They may grant users very specific read and write access. In case the descriptions of this handbook differ from the features available at your workstation, you may have been granted only restricted read and write access.

The administrator designs the query data form and index data form for folders, tabs and documents. These forms can have a real impact on your work efficiency. The administrator can easily bring changes to them according to your suggestions.

The administrator's tasks can either lie in the hands of one person or be shared among several persons. They may also be executed totally or in part by OPTIMAL SYSTEMS. Please find out who is in charge of the configuration of your system.

## About enaio®

enaio® is a modern content management workflow and archiving system.

As an **archiving system**, it makes audit-proof archiving of any document on write-once media possible. This allows you to archive your documents in an audit-proof manner and to save space and paper at the same time.

As a **content management system**, enaio® enables you to manage all types of documents. Depending on your requirements, these may be scanned documents, videos, or files created with Windows applications.

The documents are managed in an intuitive organizational system, which is tailored to your daily work tasks. There you can thematically file your documents into a hierarchical system of folders and registers. Thus, you or other users can retrieve the documents quickly. Additionally, documents can be assigned to various document types. In doing so, they are indexed in a specific way and can be found using this indexing, independently of their locations in folders and registers.

The content of documents can be full text indexed. You can therefore search documents using the full text index or combine the indexing and the full text index for the search. Likewise, folders and registers are indexed and will be just as easily located. The index and query forms are configured according to your specific requirements and the administrator can simply modify or extend them. You can change the index data of a document without changing the document itself.

As a **workflow system**, enaio® enables you to create data and documents on the basis of workflow models and in cooperation with other users. A workflow model comprises a sequence of processes which are assigned, executed, and forwarded to specific users.

enaio® additionally offers you a wide range of options to customize your workspace according to your individual needs and to the requirements arising from your cooperation with other users.

With enaio® client, you can create portfolios containing all the archive objects you want to work with, regardless of their locations in the archive. You can save queries and, for example, resume your work at a later time using the same hit list. You can place search forms, saved queries and links to other programs on the navigation and group them to meet the unique requirements of different tasks.

## enaio® clients

Different clients can be used to work with enaio®:

- § enaio® client  
the client for Windows operating systems.
- § enaio® webclient,  
the client for accessing enaio® with a browser.
- § enaio® app  
the client for tablets and smartphones.

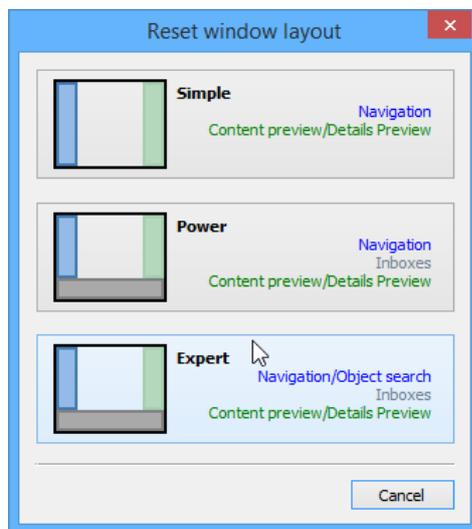
enaio® client is the subject of this manual; enaio® webclient and enaio® app are documented in other manuals.

# Starting enaio® client

## Start

When enaio® is installed, a shortcut is created on your PC for starting enaio® client.

When enaio® client is started for the first time, a selection dialog will be displayed with suggestions for the layout of different areas on the user interface.



Choose the layout which fills your requirements best. If you click **Cancel**, the workspace will be empty.

The layout can be changed at any time by dragging the individual areas to another position or using the settings dialog (see "Workspace' Area").

## Log in

After starting the program, you have to log in. You will be asked to enter your user name and password. User name and password are provided by the administrator. Type this data into the dialog and click **Log in**.

If you enter a false password three times, the user account will be locked. The administrator can reactivate the account or disable the lock function.

enaio® is usually configured so that you will be automatically connected to the network upon logging in. enaio® client will then start up without a login dialog.

When logging in for the first time using a dialog, it is recommended that you change your password. On the **ENAIO** tab, click on **Change password**. In the displayed window, first enter your current password and then the new one. Then

enter the new password a second time into the **Verify password** field. Confirm with **OK**.

Passwords have a maximum length of 100 characters. You can use extended characters, however, the characters '@' and '#' must not be used. You can use extended characters, however, the characters '@' and '#' must not be used.

If you want to log in on a workstation on which enaio® client is already running, click **Log out** on the **ENAIIO** tab. The current user will be logged out and the login dialog will open. Enter your user name and password in the dialog and click the **Log in** button. enaio® will load your personalized settings.

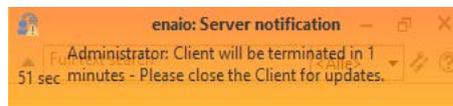
## Exit

You can exit enaio® client using **Exit** on the **ENAIIO** tab. Any changes you have made to the settings (see 'Settings') will be automatically saved.

You can also use the **Close** field on the title bar or the shortcut **ALT+F4**.

You can log out without closing enaio® client, e.g. when you leave your workstation and want to ensure that no one accesses your data. Click **Log out** on the **ENAIIO** tab. In the window which opens, you can either log in again yourself or another user can log in. If you click **Cancel**, enaio® client will be closed.

The administrator can close the client. This may be necessary for executing administrative tasks. In such a case you will be notified. The time remaining until the program is closed will be displayed.



In this case, save all documents which you have been editing.

# enaio® client User Interface

## Overview

The user interface of enaio® client consists of a title bar, a menu bar, a status bar in the outer main window and an inner workspace. The design and positions of the main workspace elements are very flexible. The settings which have been for your user group by the system administrator determine which settings can be made.

In the title bar you will find the quick access toolbar and the usual buttons, **Minimize**, **Restore**, **Maximize**, and **Close**. A ribbon with tabs follows. To the right of the ribbon, you will see the entry field for the full text search with a selection list of full text queries already set up and the object selection configuration for full text queries.

Ribbon tabs partially refer to the active hit list and objects in the workspace.

## Workspace

The following main elements of the workspace can be shown/hidden using the **VIEW** tab:

- §  Content preview
- §  Details preview
- §  Inbox
- §  Filing tray
- §  Trash can
- §  Navigation
- §  Inboxes
- §  Object search
- § Dashlets

## Result Windows

The central element of the workspace is the **Results window** where search requests, hit lists, folders, and registers and their content are shown.

The status bar of the result window contains:

- § statistics on the number of hits in a hit list and the number of selected hits;

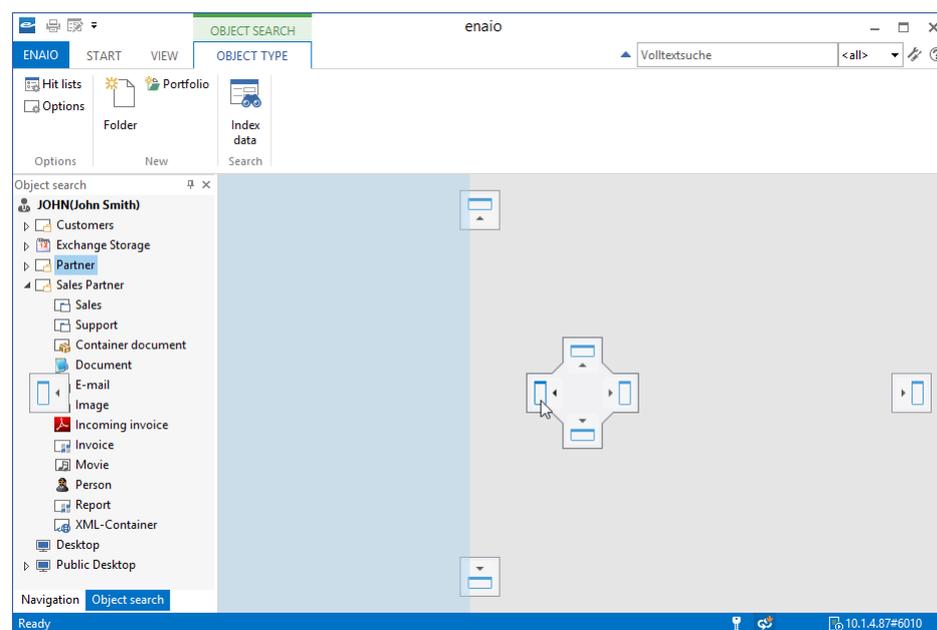
- § context-sensitive icons with which additional display options can be accessed: register view, link view, selection between quicklooks and report view, preview of index data,
- § a text input field 'Filter list'. This field is used to search hit lists. Once at least three characters have been entered, the hit list is limited to the hits which contain these characters in the index data.

## Positions of Workspace Elements

The layout of the flexible main elements of the workspace, i.e. results windows, object search, navigation, inboxes, and content or content preview can be separately modified regardless of the predefined layouts.

### Alignment in the workspace

The elements can be horizontally and vertically arranged or become 'floating windows'. Click on the title bar of an element and drag it from its present position. Then you will see arrow buttons indicating fixed positions for the element, so you can drag it with the mouse closer to an icon. A relevant position will be highlighted and if you release the mouse button the element will take the fixed position.



### Arrangement as register

Additionally, several elements can be placed as tabs on top of each other. For this purpose, drag the title bar of an element on top of another already positioned element (e.g. navigation on top of the object search). You can switch between the elements using tabs.

### Arrangement in separate windows

All panes can also be placed outside the workspace, e.g. on a second monitor, by dragging them with the mouse.

## Settings for the User Interface

Under **View > Settings** you will find many options for changing the appearance of objects and the way they are displayed. You can configure the desired settings in:

- § Workspace
- § Result Windows
- § Query behavior
- § Inboxes

You can revert to the default layout at any time using the settings dialog **Workspace > Reset window layout** (see 'Resetting Window Layouts').

As so many different settings can be made, please note that the text and images below are generally based on the assumption that the **Tabs** option has been enabled under **File > Settings > Workspace**. If you use other settings, details may differ from the version presented here.

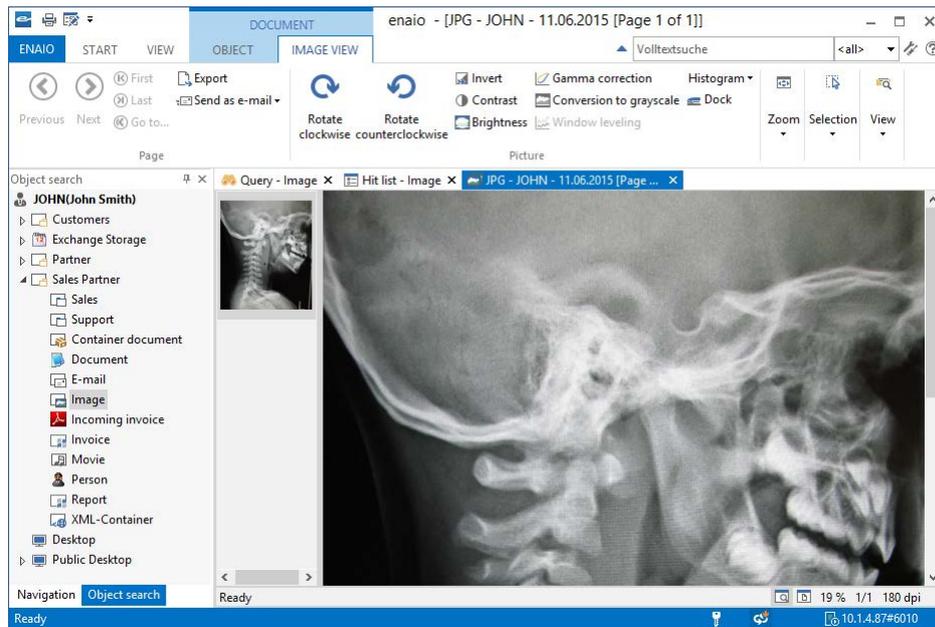
In the workspace, you can show or hide the object search, navigation, content/preview, details preview, and inboxes.

### Tab Display

Forms, hit lists, folder windows, and objects are shown on tabs. Clicking on the tab headings allows you to browse quickly through the information arranged on the tabs.

The display with tabs can be configured via **ENAIIO > Settings > Workspace** (see 'Tabs and Window Display').

For example, you can position the tab headings at the top or bottom.

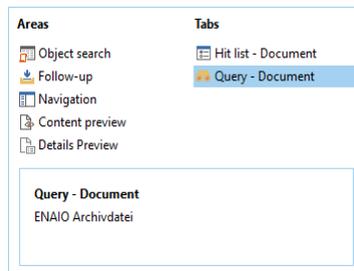


Instead of displaying the data on tabs, you can also display it in windows.

## Window Display

The window display can be configured via **ENAIO > Settings > Query behavior** (see 'Tabs and Window Display').

Windows within the workspace can be dragged to any position using the mouse and they can be minimized using the title bar. They are then placed in the lower part of the workspace.



You can navigate between the windows using **CTRL+TAB**. A dialog is provided for selecting the active windows and the workspaces within the windows.

In the window view mode, hit lists, folder windows and document display windows can be additionally enlarged or reduced with the mouse and be maximized using the title bar. In the window menu on the title bar, you can save the position, size, and column width of the window.

Areas may be at the wrong position after you have changed the screen resolution. If this is the case, press and hold the **F8** key while starting enaio® client. Areas will then appear in their default positions.

## Ribbon

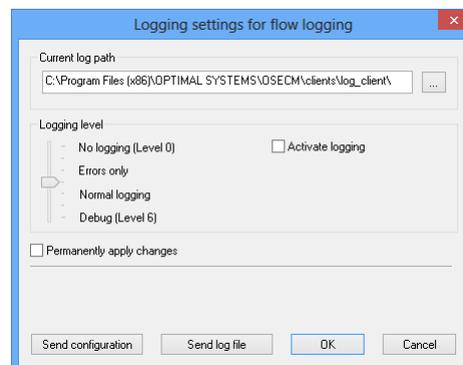
The ribbon contains the ribbon tabs. As usual, you can open them with a mouse click or with the shortcut key **Alt+LETTER**.

The menu tabs and their entries adjust themselves according to the work context. If, for example, you open a hit list, the ribbon will contain the tab **HIT LIST**. The entries then match the ones in the context menu of the hit list.

The **ENAI0** ribbon tab is always shown in the ribbon; the **START** and **VIEW** ribbon tabs are shown on start-up by default. Users with corresponding system roles can adjust ribbon tabs in the settings (see 'Customize the Ribbon' Area).

## ENAI0 Tab

- Print** You open a selection dialog and have the following options:
- § print all documents from the hit list with or without annotations
  - § print the hit list with all or the selected objects only
- Log out** You can log out without closing enaio® client,
- Password change...** You can change your password.
- Logging** You can change the logging level for the period of a session. In case of error, it enables you to instantly send the relevant information to the administrator.



The **Send configuration** button is used to send the currently set log configuration by e-mail. In doing so, all log files of the current day and the configuration file will be send as a ZIP file.

Users with the system role 'Administrator: Configure entire system' can permanently adopt the logging level settings. Access rights and system roles are assigned by your administrator.

**Information** Information about enaio® client and workstation are displayed.

**Help** You can open the online help, the full text help, and the keyboard shortcut help.

- Settings** Open the settings dialog (see 'Settings')
- Presence** You can change your presence state (see 'Absence and Substitution').
- Exit** Exit enaio® client.

Keyboard operation of this tab is limited to navigation by TAB or arrow keys.

## START Tab

- New** Choose a folder type to create a new folder using its index data form, or create a new portfolio.
- Search** Open the query form for the following queries:
-  Index data
  -  Full text
  -  Portfolios
  -  Properties / Basic parameters
- Objects**
-  History
  -  Favorites
  -  Shared for me
  -  Check in all
- Start application** Here you will find all integrated external applications.

## VIEW Tab

- Windows** You can decide whether the currently open windows will be displayed as cascading windows or as tiling windows alongside each other, between switching between windows and closing the window.
- Preview** You can open the preview and details preview in this group.
- Areas** Open the following areas via the Areas group:
-  Inbox,
  -  Filing tray,
  -  Documents shared by me,
  -  All document shares,
  -  Trash can,
  -  Navigation,
  -  Inboxes,
  -  Object search.

The administrator can integrate additional dashlets (see 'Dashlets').

## The Full Text Search Input Field

The input field for the full text search can be found at the far right of the menu ribbon.



Next to it there is a selection list containing the full text queries already set up where you also have the possibility to configure the object types with which you wish to search and to save the configuration (see 'Full Text Search Configurations'.)

The full text search starts as you enter a search term and press enter.

Using the **✕ Delete** icon you can quickly delete characters typed in the full text search field and reset the search field for a new search term.

Auto-complete helps you with your input. As soon as you have entered three characters, existing terms that start with these characters are displayed and can be accepted.

## Online Help

You can open the online help using **F1**, the button on the right of the ribbon, or using the **ENAIIO** tab.

## Quick Access Toolbar

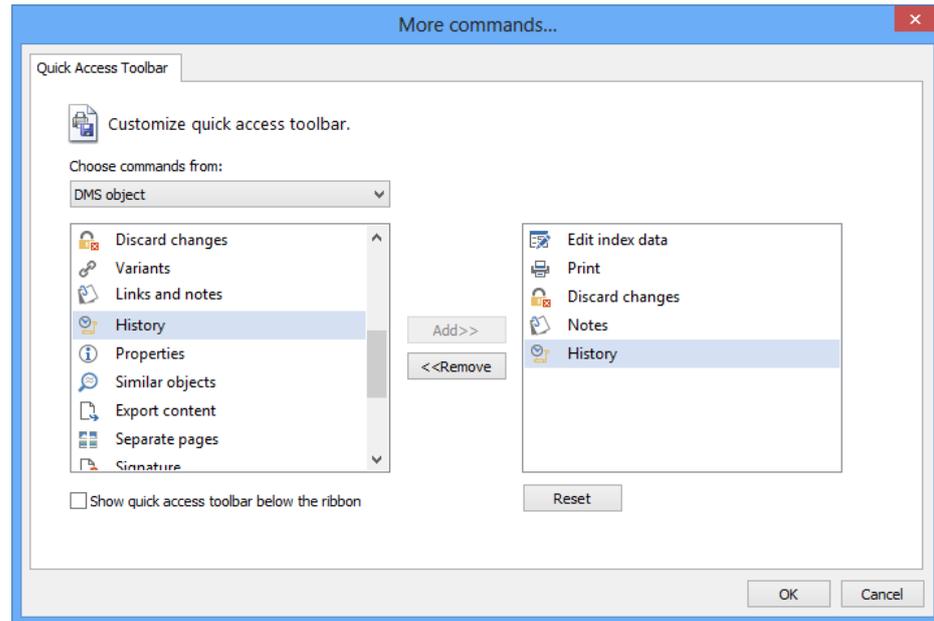
The quick access toolbar is above the ribbon, but can also be displayed below it.

The toolbar contains only a few commands as standard, but can be easily customized to include further commands to which you wish to have quick access.

Following an update of enaio® client, adjustments to the toolbar and ribbon will be automatically reset.

### Customizing the Quick Access Toolbar

1. Click the arrow on the right of the toolbar.
2. Select **More commands**.



3. Select a command and assign it to the toolbar with **Add**.
4. Click **OK**.

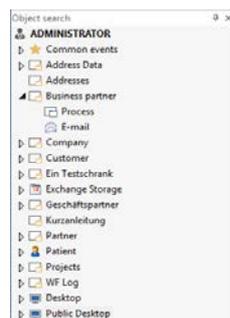
® The toolbar is customized.

The commands allow a better overview in groups by being separated. Click **Reset** to return the toolbar to its default.

An appropriate system role is necessary to personalize the toolbar.

## Object search

Open the object search from the ribbon tab **VIEW** in the **Areas** group.



There you find the folder types with the assigned register and document types and the desktop directories.

The **Desktop** directory contains saved queries, SQL queries, and links that you create yourself. These objects can be managed in folders. You require the appropriate system role to set up this directory.

The **Public desktop** directory contains saved queries, SQL queries, and links which are available to all users.

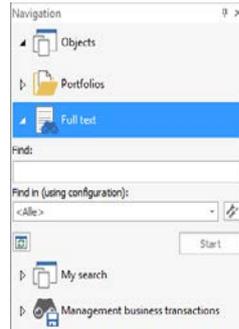
The context menu for the objects in the **Desktop** and **Public desktop** directories contains the key editing features.

These keyboard shortcuts can be used in the object search area:

- ARROW keys** Use the arrow keys to move up and down, left and right in object search.
- ENTER** Open/close a directory, open a query form, start a saved-query, or start a linked application.

## Navigation

Open the Navigation from the **VIEW** ribbon tab in the group **Areas**.



You can set up groups, and use them to organize links to individual objects or search forms which are necessary for your daily tasks. You can open and close the group areas using the arrow icons in the title bars or via the spacebar or the +/- buttons on the numeric pad of your keyboard.

You can also incorporate the full text search with the selection list of set-up full text searches and the object selection configuration for full text searches, as well as the portfolio query, and the queries created with variables into the navigation.

The key editing features can be found in the context menu for objects in the navigation.

Various display styles can be selected from the navigation context menu.

## Content preview

The preview is opened from the ribbon tab **VIEW > Contents**.

You can also move the pane outside the workspace with the mouse, e.g. to position it on a second monitor.

The preview is updated when browsing through hit lists, data sheets, and other lists, for example, the workflow file. Previews are only shown to users who have the corresponding rights to the documents.

If the preview is integrated and configured accordingly, thumbnail views of the first pages of enaio® objects are added as e-mail attachments when e-mails are sent internally with Microsoft Outlook.

A default page is shown once the enaio® client has started, if no document is selected. The default page can be configured by the administrator.

### Content Preview from Hit List or Inbox

If you select a document in a hit list or in the inbox, the preview for that document is shown. The preview is shown until a different object is selected.



For documents with several variants, the preview always previews the active variant. This is also the case if a selected reference document is linked to an inactive variant.

## Preview Annotations

Users can add annotations in the form of text at any place in the content preview.

Annotations can be created, edited, moved, or deleted. When minimized, annotations are shown as speech bubbles. They can also be completely hidden.

In the tooltip for an annotation, the last editor is shown with the date. This data is also written to the history.

Annotations are positioned on one side, but are not linked with the text. If the text is changed, the position of the annotations does not change. As a result, the content and annotations may no longer match up and comments may need to be repositioned.

The content preview including annotations can be exported in PDF format.

 The annotation functions can be selected via the annotation menu:

**Add text:** Click at the place where the annotation is to be added and enter the text on the note sheet.

The annotation is immediately saved.

The annotation can be minimized and deleted using the title bar.

**Hide annotations:** The annotations are hidden for the current document.

**Export:** Document with annotations is exported as PDF.

Users require suitable system roles to show, edit, and export.

## Search Function for Content Preview

The preview offers a simple search function for the preview files of text documents. To use it, open a search window with **CTRL+F** or by clicking on the magnifying glass in the status bar and then enter the desired text. After three letters, results will be highlighted within the document and at the left margin.

With the mouse, you can select text passages in documents and copy them to the clipboard with **CTRL+C**.

The following restrictions apply:

- § Images and texts on images cannot be copied.
- § When copying a text section selected in e-mails, whitespaces are removed.

## Content Preview Functions

### Common functions



Refresh document preview



Text search for text documents



Show/hide page preview bar



Create and administer preview annotations



Gradually zoom in

Also using the + key on the numeric pad and via **CTRL+scroll wheel**.



Gradually zoom out

Also using the - key on the numeric pad and via **CTRL+scroll wheel**.

The following view settings can be switched according to the current document view:



The document content is shown in its original size regardless of the window size.



The document display adjusts horizontally to the window size.

 The document display adjusts vertically to the window size.

### E-mail attachments

In the page preview bar in the lower part of the content preview, e-mail attachments are marked with a paper clip icon:

 E-mail attachment

Clicking on the attachment icon shows the preview of the e-mail attachment, if possible. From the preview of the e-mail attachment you can switch back to the e-mail via the document icon:

 Switch from attachment back to e-mail

### Navigation

To navigate in the document, click the thumbnails or select the specific page you want to view with the page number. Alternatively, you can use the arrows in the status bar or the arrow keys on the keyboard:

<b>UP ARROW</b>	Navigate up in the document
<b>DOWN ARROW</b>	Navigate down in the document
<b>Home</b>	Go to the first line of a document
<b>End</b>	Go to the last line of the document
<b>PAGE UP</b>	Previous page
<b>PAGE DOWN</b>	Next page

If a hit list contains several documents, you can use preview to browse from the last page of a document directly to the first page of the next document in the hit list. The same applies if you browse from the first page of a document back to the beginning of the previous document in the hit list. This feature is also available in folder and register views.

## Details preview

Open the details preview from the ribbon tab **VIEW > Details**.

You can also move the pane outside the workspace with the mouse, e.g. to position it on a second monitor.

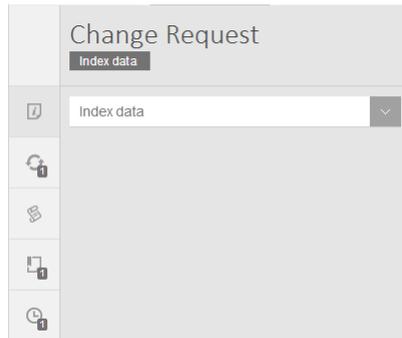
If the index data in the details preview contain e-mail addresses or links to websites, these can be opened in the default e-mail application or browser with just one click.

A default page is shown once the enaio® client has started, if no document is selected. The default page can be configured by the administrator.

## Details Preview from Hit List or Inbox

When you select a document, register, or folder in a hit list or in the inbox, the following details for the object are shown: Index data, connected workflows, history, and notes.

These details are displayed until a different object is selected.



The basic parameter properties are also displayed for the index data. If the index data contains tables, this data is shown in a separate section.

The individual sections can be expanded and collapsed. Empty data sheet fields are not displayed. Contents can be copied to the clipboard using CTRL+C.

## Further Information in the Details Preview

The following data are shown alongside the index data:



### Index data



### Workflows

For objects that are also in a workflow file, the workflow data is also shown.



### History

The history lists which actions have been carried out with the object.

You can switch between a restricted view and a view of all entries via the header.

The restricted view only shows the most important actions, such as changes to content and index data. The user concerned in each case is also shown.



### Notes

If notes have been added to objects, they are shown here with the date and creator. You can add a note and edit or delete existing notes.



### Follow-ups

If you have set up follow-ups for objects, the follow-up data are displayed here. You can also see here if other users have set up follow-ups for you for

the object.

The buttons for workflows, notes, and follow-ups are labeled with numbers if there are data in these areas.

## Dashlets

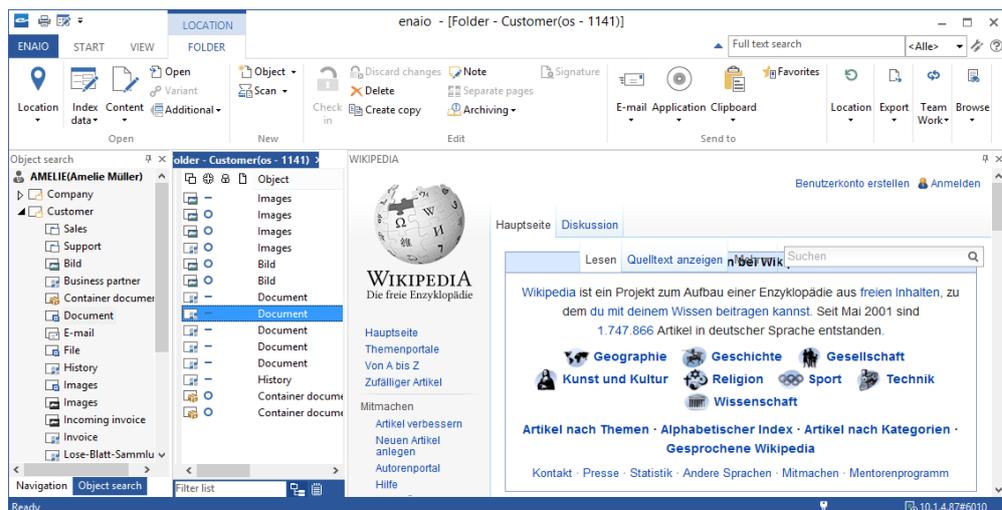
Dashlets are customizable, context-sensitive areas which can be integrated with enaio® client.

The content of dashlets is predefined by the administrator and cannot be changed by users.

They allow you to incorporate information sources, e.g. Internet pages such as Wikipedia or Google Maps. Up to ten additional dashlets are possible in enaio® client.

An additional button will be added in the **VIEW** ribbon tab in the **Areas** group for every integrated dashlet.

Reset the window layout of enaio® client (**File > Settings > Workspace**) before you can show/hide a newly set up dashlet.



## Inboxes

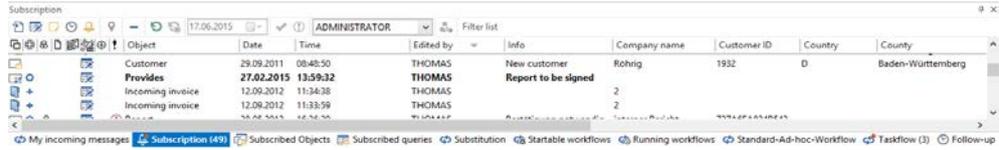
Open the inbox from the ribbon tab **VIEW** in the **Workspace** group.

In this area, follow-ups, subscriptions, and workflow processes are managed in designated inboxes.

You can specify which inboxes will be shown under **ENAIO > Settings > Inboxes**.

The 'Inboxes' area in the settings dialog can also be opened directly from the context menu of the inbox column headers.

Subscription notifications, follow-ups, and work items can be managed in the main inbox **My incoming messages**. You can set up designated inboxes for all types.

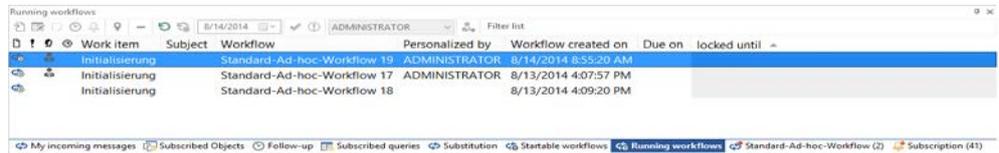


## Subscription Inboxes

The subscription configurations for objects and queries are managed in separate inboxes which can be shown/hidden via **ENAIO > Settings > Inboxes** or via the context menu of the column headers.

## Workflow Inboxes

Workflows and work items are managed in your inboxes. Open the inboxes from the tab **ENAIO > Settings > Inboxes** or from the context menu of the column headers.



Here you will see the following workflow inboxes:

### § Startable workflows

All  workflows which you can start are listed here.

### § Inboxes

All active work items which you can execute, as well as all personalized  work items which you are executing, are listed in the My incoming messages inbox or in workflow-specific inboxes. Work items whose due date has expired are flagged with a red  exclamation mark.

### § Substitution

All workflows and active work items of users you are substituting are listed in this inbox.

### § Running workflows

The active work items of workflows which you have started are listed here. For personalized work items, the current user is listed. Workflows with a closure period are marked with a clock icon.

The settings permit you to create an inbox for each startable workflow and to configure the columns which are to be shown in the inbox.

## History

Open the tab with the recently edited objects from the **START** ribbon tab in the **Objects** group.

Recently edited objects will be listed here. The type of modification is flagged by an icon:

 The object was created.

 Pages were edited or added.

 Index data were edited.

Set how many objects will be listed here using the tab **ENAIIO > Settings > Workspace**. Up to listed 15 objects are preset.

Using the tab **ENAIIO > Settings > Auto**, specify whether the tab is automatically opened when starting enaio® client.

## Status bar

Icons with current status information will be displayed in the status bar at the bottom of the enaio® client window:

 An add-on is being executed.

 A script is being executed.

 Active encryption.

 New follow-ups.  
Click the icon to open the area.

 New subscriptions  
Click the icon to open the area.

 A work item is present.  
Click the icon to open the area.

 Expiring document shares are present.  
Click the icon to open the area.

 Name or IP address of the enaio® server to which enaio® client is connected.

## Key Assignment for the Workspace

	KEY	Description	Note
	<b>F1</b>	Open online help tool	
	<b>F2</b>	Edit index data	
	<b>SHIFT+ Double-click</b>	Edit index data	Only for links to documents which have been created in the object search and

			navigation area.
	<b>F3</b>	Determine folder for document	
	<b>F4</b>	Open variant administration	Only for W-Documents
	<b>F5</b>	Update view	
	<b>F6</b>	Check in document	Only for own checked-out documents
<b>+</b>	<b>F7</b>	Set the document property to 'approved for archiving'	
	<b>F8</b>	Show property	Press <b>F8</b> while starting the client to position all areas in their default locations.
	<b>F10</b>	Open link window	
	<b>F11</b>	Show history	
	<b>SHIFT+F2</b>	Open document for editing	
	<b>SHIFT+F3</b>	Determine register for document	
	<b>SHIFT+F4</b>	Create copy of document	Copying a folder or register only copies the object, but not its content.
	<b>SHIFT+F5</b>	Cancel update of display	
	<b>SHIFT+F6</b>	Undo checkout	Only documents which you checked out or outsourced yourself
	<b>SHIFT+F7</b>	Set the document property to 'not approved for archiving'	
	<b>SHIFT+I</b>	Preview URL	The HTTP reference to the preview file in the content preview is copied to the clipboard.
	<b>CTRL+F2</b>	View index data (read-only)	

	<b>CTRL+SHIFT+F2</b>	Open Document as Read-Only	
	<b>CTRL+F3</b>	open location	
	<b>CTRL+SHIFT+Double-click</b>	Determine location	Only for links to documents which have been created in the object search and navigation area.
	<b>CTRL+F4</b>	Close active window	Also with <b>ESC</b> key and <b>CTRL+SHIFT+F4</b>
	<b>CTRL+F5</b>	Reload server-side settings	Administrative changes (not all) can be transferred without restarting enaio® client.
	<b>CTRL+F6</b>	Switch between open windows in the workspace	
	<b>CTRL+TAB</b>	Switch between open windows in the workspace. A dialog is provided for selecting the active windows and the workspaces within the windows.	
	<b>CTRL+A</b>	Select all	
	<b>CTRL+SHIFT+A</b>	Select all of same type	If an object is selected in a list, all other objects of the same type will be selected as well.
	<b>CTRL+B</b>	Exporting document files	
	<b>CTRL+E</b>	Export index data	The content of a table on a form is copied to the clipboard.
	<b>CTRL+F</b>	Search in hit lists	Open the 'Filter list' feature in the status line of the hit list. If the quicklooks display option is set, this feature is not available.
	<b>CTRL+H</b>	Create object of the recently	Use <b>CTRL+SHIFT+H</b> to

		selected type	open a list with the object types.
	<b>CTRL+J</b>	Send document in PDF format as attachment to external recipient by e-mail.	
	<b>CTRL+K</b>	Send document as e-mail attachment to external recipient.	
	<b>CTRL+L</b>	Free text search: Search in notes and link notes	
	<b>CTRL+SHIFT+L</b>	Clear free text search	
	<b>CTRL+M</b>	Send document as e-mail attachment to internal recipient	
	<b>CTRL+N</b>	Create the document of the type that was chosen most recently as a 'document without pages'.	Use <b>CTRL+SHIFT+N</b> to select the document type from a list.
	<b>CTRL+O</b>	Open object	W-Documents are opened depending on the set option.
	<b>CTRL+P</b>	Print document or hit list	Hit lists allow you to either print selected documents or the entire hit list.
	<b>CTRL+Q</b>	Open or close inboxes	
	<b>CTRL+SHIFT+Q</b>	Open or close content preview	
	<b>CTRL+R</b>	Open the dialog box for basic settings	Within the different areas, use the arrow and <b>TAB</b> keys to navigate. Check boxes are selected with the spacebar.
	<b>CTRL+S</b>	Sign Document	
	<b>CTRL+T</b>	Close all tabs	Close all registers and windows in the result window.
	<b>SHIFT+T</b>	Close active tab	

	<b>CTRL+SHIFT+T</b>	Close all other tabs	
	<b>CTRL+W</b>	Open or close object search	
	<b>CTRL+SHIFT+W</b>	Open or close navigation	
	<b>CTRL+U</b>	Set up follow-ups	
	<b>CTRL+Z</b>	Send document as e-mail attachment (ZIP file) to an external recipient	
	<b>CTRL+SHIFT+U</b>	Set up subscription	
	<b>CTRL+SHIFT+H</b>	Create document	The type is selected from a list.
	<b>CTRL+SHIFT+N</b>	Create document 'without page'	The type is selected from a list.
	<b>CTRL+SHIFT+F</b>	Open dialog 'Filter management' in folder window	
	<b>CTRL+SHIFT+F2</b>	Open Document as Read-Only	
	<b>CTRL+SHIFT+F3</b>	List all objects which are connected to the selected object	
	<b>ALT+F4</b>	Exit enaio® client.	
	<b>SHIFT+F</b>	Open filter list	Available in the folder window
	<b>ALT+DOWN ARROW</b>	Opens an input panel for the corresponding selection list if there is a focus	In index data or query form
	<b>CTRL+mouse wheel</b>	Larger or smaller font size in the results window	In folder windows and hit lists
	<b>Backspace</b>	Go to parent folder	Available in the navigation area of folder and register windows if a folder or register is selected.

Terminal server environments do not support this key assignment
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## Key Assignment for the Document Display Window

Keys	Function
<b>C</b>	Basic settings
<b>E</b>	Export page
<b>I</b>	Show property of image
<b>CTRL+D</b>	Basic settings
<b>CTRL+G</b>	Grayscale conversion
<b>CTRL+I</b>	Invert
<b>L</b>	Rotate 90° to the left
<b>SHIFT+L</b>	Rotate 180°
<b>R</b>	Rotate 90° to the right
<b>SHIFT+R</b>	Rotate 180°
<b>RIGHT ARROW</b>	Scroll right
<b>LEFT ARROW</b>	Scroll left
<b>UP ARROW</b>	Scroll up
<b>DOWN ARROW</b>	Scroll down
<b>SHIFT+END</b>	Right border
<b>SHIFT+Home</b>	Left border
<b>PAGE DOWN</b>	End of page
<b>PAGE UP</b>	Beginning of page
<b>SHIFT+PAGE DOWN</b>	Scroll to the right
<b>SHIFT+PAGE UP</b>	Scroll to the left
<b>CTRL+mouse wheel</b>	Zoom in/zoom out
<b>CTRL+W</b>	Select window leveling
<b>NUM LOCK +</b>	Zoom in one level
<b>NUM LOCK /</b>	Minimize
<b>CTRL+ NUM LOCK /</b>	Recover window size
<b>SHIFT+PAGE DOWN</b>	Show next document
<b>END</b>	End of page

<b>Home</b>	Beginning of page
<b>CTRL+LEFT ARROW</b>	Show first page
<b>SHIFT+LEFT ARROW</b>	Show previous page
<b>NUM LOCK *</b>	Maximize
<b>CTRL+ NUM LOCK *</b>	Recover window size
<b>SHIFT+RIGHT ARROW</b>	Show next page
<b>CTRL+PAGE DOWN</b>	Show last page
<b>NUM LOCK -</b>	Zoom out
<b>SHIFT+PAGE UP</b>	Show previous document
<b>CTRL+E</b>	Edit data
<b>CTRL+P</b>	Print
<b>ALT+P</b>	Print with selected layers
<b>F10</b>	Show overview window
<b>SHIFT+F10</b>	Open context menu
<b>CTRL+S</b>	Save page as
<b>ESC</b>	Close window
<b>F2</b>	Show index data
<b>CTRL+F3</b>	Determine location
<b>CTRL+A</b>	Edit annotations
<b>SHIFT+G</b>	Gamma correction
<b>SHIFT+H</b>	Adjust histogram
<b>CTRL+H</b>	Histogram contrast
<b>F</b>	Fit to window width
<b>SHIFT+F</b>	Fit
<b>SHIFT+A</b>	Animation
<b>H</b>	Set brightness
<b>K</b>	Set contrast
<b>G</b>	Grayscale conversion
<b>M</b>	Highlighting mode
<b>O</b>	Move image
<b>V</b>	Zoom mode
<b>SHIFT+O</b>	Identify – excerpt

<b>G</b>	Recognition for document
<b>SHIFT+S</b>	Recognition for page

## Key Assignment in the Editing/Scan Mode

Keys	Function
<b>INS</b>	File document
<b>DEL</b>	Delete page
<b>F9</b>	Scanning
<b>F11</b>	Select scan source
<b>F12</b>	Scan (TWAIN)
<b>CTRL+SHIFT+F12</b>	Revert scan settings (TWAIN)
<b>B</b>	Batch scan – create new document
<b>CTRL+O</b>	Import
<b>T</b>	Configure settings
<b>TAB</b>	Switch between preview/display and batch area

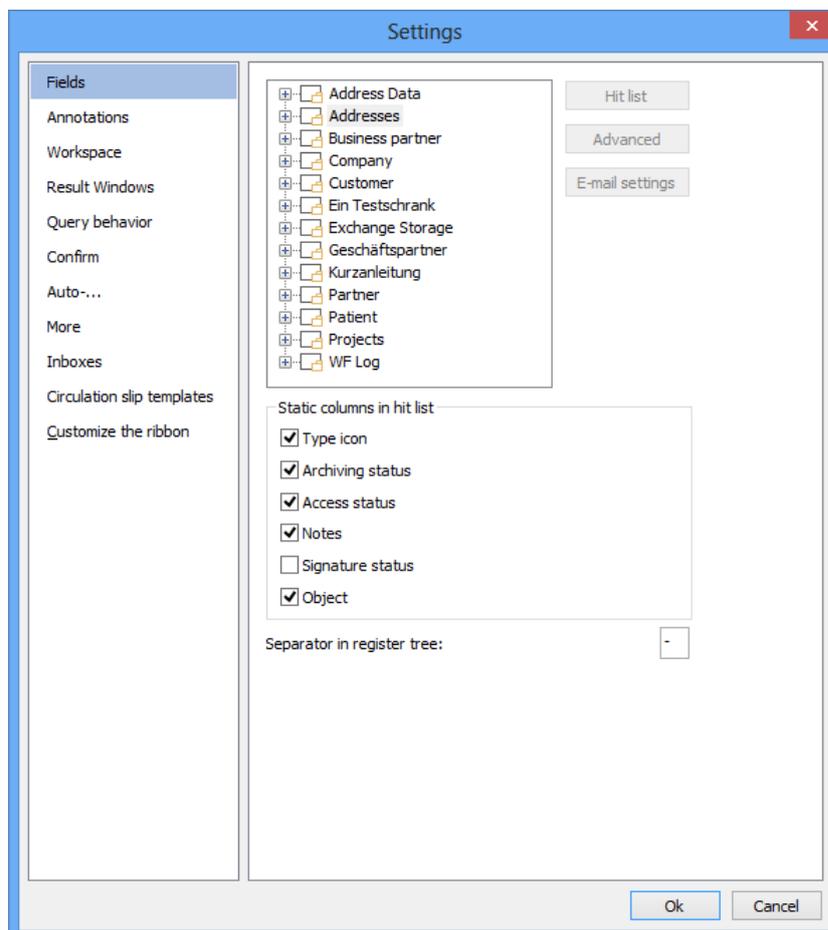
Terminal server environments do not support this key assignment

# Default Settings for enaio® client

## Settings

enaio® client is highly configurable. Among many things, you can configure settings for confirmation dialogs and the way windows are shown. Every time you start enaio® client, these settings are activated. Choosing the correct settings for your requirements can greatly facilitate your work.

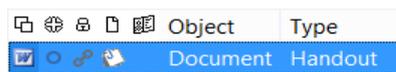
Open the **Settings** window from **Settings** in the **ENAIO** menu or with the keyboard shortcut **CTRL+R**. There you will find the default settings areas, sorted thematically. If you click an item in the list, the respective settings area will be shown to the right.



## 'Fields' Area

In the 'Fields' area, the configured folder types are presented in a tree structure. With a double-click or a single-click on the leading  icon, register types, document types, the folder type, and the basic parameters are shown.

In the **Static columns in hit list** area, set which columns will be shown in the hit list for folders, registers, and documents.



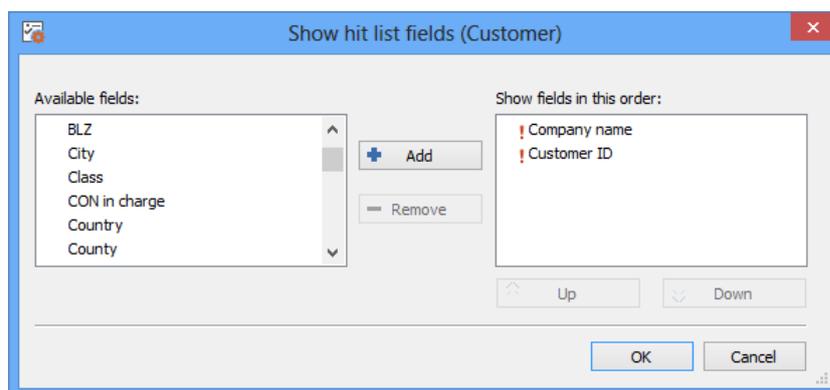
The settings for static columns of the hit list apply to all object types.

The specified separator separates the index data entries in the register tree.

## Hit list

For a selected document type, folder type, or register type, press the **Hit list** button to open the **Show hit list fields** window. In the 'Fields' area select fields from the index data which will be used as columns in a hit list and in a folder window.

The window can also be opened through the **Fields for hit list** item in the context menu of a selected folder, register, or document type in the object search.



To determine which hit list columns will be displayed, select one or multiple fields from the list of existing fields and add them to the list of displayed fields. Change the order of the fields with the **Up** and **Down** buttons.

For the columns of a document hit list, you can additionally select entries from the basic parameters and the folder index data. The selection affects all document types from the corresponding cabinet.

Select **Document basic parameters** of a cabinet and use the **Hit list** button to open the window **Show hit list fields**. Basic document parameters and folder index data fields are shown in the **Existing fields** area. Select the fields and their order in this area.

Select **Folder basic parameters** or **Register basic parameters** of a cabinet and click the **Hit list** button to open the **Show hit list fields** where you can select basic parameters of the folder or register as fields for hit lists.

In the **Show hit list fields** window, **!** mandatory fields, **⚡** key fields, and the fields from the **📄** basic parameters are flagged.

## Options

Depending on the archive object type, you can select one of the following options using the **Options** button:

§ Approve for archiving at creation

These documents are automatically set with the property **+** 'approved for archiving' when created.

Registers and folders will not be archived and do not have any archiving properties.

§ Save index data to clipboard

The index data of a new archive object will be temporarily retained; the fields of the next archive object of the same type will be preset with these values in the index data form.

Entries in multiple fields or read-only fields are not retained.

§ Use index data for external mail

For external mail, the index data as displayed in the hit list, will be used to name the file. The length is restricted to 100 characters. Character that the operating system identifies as invalid for file names will be removed. If a document contains more than one file, a counter will be appended, beginning with the second file.

Registers and folders cannot be sent externally.

§ Use index data for internal mail

The index data as displayed in the hit list, will be used to name the link. The length is restricted to 100 characters. Character that the operating system identifies as invalid for file names will be removed.

§ Debug events

Events will not be executed all at once, but rather line by line in the event editor. This function is only available to users with appropriate rights.

§ Show links

The link area for the folder is displayed underneath the contents area.

§ Folder hit list as register tree

A folder hit list is not displayed for a folder query; instead a view is displayed that contains the list of all found folders in the left navigation pane and the content on the right. The list in the navigation pane cannot be sorted.

§ Show register tree

A navigation pane is displayed in the folder window.

§ Sort record tree (ascending)

In the navigation area of the folder window, the register types and the registers within the types are listed in ascending or descending alphabetical order.

§ Determine number of objects in register tree

For each register, the total number of objects will be displayed in the navigation pane. The display ignores the user's access rights. That is why the hit list may contain fewer objects than shown here.

§ Free text input when saving the documents

A text editor will be opened when a document file of the selected object type is saved, in which you can add an entry to the history.

§ Double-click to open documents as read-only

Existing W-Documents or container documents will open in read-only mode when double-clicked.

These settings can also be easily executed through the **Settings** item in the context menu of the selected folder type, register type, or document type in the object search.

## E-mail settings

Click the **Send** button to specify the fields whose index data are used to identify an object when sending it.

## 'Annotations' Area

In the 'Annotations' area you specify the default settings for annotations on layers.

You select colors for **Lines**, **Highlights**, **Font**, and **Filled rectangle**.

You can preset the **Font for text fields**, the **Font size**, and the **Line width**.

## 'Workspace' Area

### Auto save on exit

You can determine how the workspace is saved on exiting the application. The following changes in the object search can be automatically saved:

§ Positions (Navigation/Object search)

The navigation and the object search area will open in the positions they had when the program was last exited.

If you press and hold the F8 key while starting enaio® client until 'ready' is displayed in the status bar, the navigation and the object search will not be shown and reset to their default values.

§ Settings (Navigation)

The current arrangement of the navigation is saved.

## § Settings (Object search)

The current display of the object search is saved.

### Resetting window layouts

The layout of the main workspace areas can be changed with the **Reset window layouts** button (see also 'Settings for the User Interface').

Choose the layout which best meets your requirements. To move an area to another position click into the title bar of an area and move it to the desired position.

### Language settings

You can choose a language for the enaio® interface. This setting will be applied immediately, and also applies to other enaio® applications. In enaio® webclient and enaio® capture, the interface language can be modified for the application in question.

You can also select a language for the object definition. The field names in the index data and query forms will then be read from a language table, which was created along with the object definitions. In the same manner, the workflow forms will be displayed in the language versions.

enaio® client must be restarted if you change the language of the object definition.

### Tabs and Window Display

You can show forms, hit lists, folders, and documents in individual **windows** instead of as tabs (see 'Window Display'). To do this, simply disable the **Tabs** option. You can then specify on the **VIEW** ribbon tab whether the windows that are currently open should be cascaded or tiled horizontally.

In the **tab view** the currently active tab is highlighted. You can specify how the tab headings will be displayed. By default, the tab heading is a single line at the top of the tab. Due to the more compact display, the one-line display for devices with a low display resolution is recommended.

When you set the tab display, in the context menu for a tab heading you can save the column widths of the shown hit list, enable the tab, and close all tabs but the active one.

Moreover, a portfolio or folder can be sent by e-mail directly from the context menu of the tab. If a register is selected in a folder view, the register will be sent. If no register has been selected, the folder will be sent. In the same way, queries can be sent because the feature is also available when a hit list was created by using a saved or SQL query. The objects mentioned are sent as enaio® files by default.

When working with several tabs, you can select the desired tab by dragging an element to the corresponding tab.

If you switch from tab view to window view you must restart enaio® client to apply the changed setting. If you log on to enaio® client without restarting it beforehand, running view settings will not be changed.

### Menu display

Optimized menus show only the features that are used frequently in the context menus. All other features can be accessed via the ribbon. The keyboard shortcuts for the features can be shown in the context menus.

The history can be shown via the **START** ribbon tab. The number of recently edited objects shown in the history can be specified here.

### Color scheme

You can choose between the **White** and **Light gray** (default) schemes.

## 'Results Window' Area

### General

You can specify whether the column widths and window positions of lists and dialogs should automatically be saved when you exit enaio® client. The column width and position of link windows are not saved automatically.

### Display

For the display of hit lists and inboxes you can define:

- § whether separators are shown between the lines,
- § whether even and uneven lines should have alternate background colors and which colors should be used,
- § whether the color of the column used for sorting should be more strongly or more softly highlighted,
- § what font size the lines are to be shown.

### Filter lists

For filtering in lists, you can specify whether the search term or cell should be marked.

### Colors

For lists, you can specify text and background colors for even and uneven lines.

You can specify the background color for selection of the filters in lists and the grouping in lists.

## 'Query Behavior' Area

### Hit list

Here you can decide on the display levels of a hit list, i.e. whether hit lists be displayed as folder, register or document lists and whether this depends on the topmost tab or is manually selected.

### Query window

You can specify whether the Query window will remain open, be minimized or closed after completing a query.

### Close before starting a query

To start the query, select the register or window types to be automatically closed when you start a query.

### More settings

You can also specify whether to record **objects without register assignment** in the hit list of a query for register and document data, i.e. documents not located in a register.

With the option **Use the same hit list if possible** you specify that for a new query, a hit list still open from an earlier query will be updated. If this option is not selected, then a new hit list will be opened for a new query. This behavior can be individually set on every search form using the  /  Reuse hit list buttons.

The setting **Open one hit list for each folder** specifies that, when a folder is opened, it is checked whether the folder is already open and, if it is, it is brought to the foreground instead of being opened again.

You can also restrict the hit list to a certain number of hits and specify whether you want to be informed if a hit list exceeds the set number of hits.

The maximum number of hits in hit lists that is specified by the administrator always applies.

## 'Confirmation' Area

You can decide the situations in which actions need to be confirmed with a confirmation dialog.

The **Save when switching data sheet** feature enables you to specify whether changes to index data are saved automatically when browsing hit lists. If the feature is deactivated, modified index data are saved by default while browsing to the next data sheet without a confirmation dialog.

You can also set up a **confirmation dialog to appear before opening** documents, hit lists, and database catalogs that are larger than a specified size. If, for instance, a document exceeds the specified size, you have to confirm that you want to open it.

The administrator can also configure a confirmation dialog to appear before opening large documents. If there as been another size specified, the administrator's setting will be overwritten. The default settings for the number of hits when opening a hit list or a database catalog can also be overwritten.

Process supervisors with the system role 'Client: Workflow process administration' can cancel a workflow process from the context menu of the **Running workflows** inbox. The feature **Cancel running workflows** enables users to specify whether canceling of a workflow has to be confirmed.

The administrator can set PDF as output format for archive prints. If this is the case, for the **AS printer** you can set up a confirmation dialog before PDF generation. In this confirmation dialog, instead of PDF, you can select TIFF G4 for black-and-white prints with the archive system printer and JPEG for color prints with the AS color printer.

The administrator can install a system-wide security check before saving the index data. Regular users cannot disable these confirmation dialogs.

## 'Auto' Area

### Asterisk

You can decide whether to automatically append/prepend search form fields with a '\*' (placeholder for any string of characters). The default settings you specify here also apply for enaio® webclient.

Queries with placeholders and queries with parts of terms require more time than queries without these extensions.

A wildcard can be entered as follows:

§ Behind the entry (e.g. 'abc\*')

A placeholder is added to text fields which have not been assigned a catalog by a button behind the field.

§ In front of the entry (e.g. '\*abc')

A placeholder is added to text fields which have not been assigned a catalog by a button behind the field.

Queries with this option enabled require much more time.

§ behind the entry of a database catalog

A placeholder will be added to database catalog fields when you click the button to display the catalog values. For searching by use of an entry in a database catalog field, the setting from 'behind the entry' is used.

You can also enable the option **Search for parts of terms**. If you enter several terms into a field, all objects which are indexed with these terms will be retrieved.

These settings are not valid for queries on notes and links, nor for queries on table fields or full text queries.

### Open and close

In the **Open (one hit)** area, you specify whether, for hit lists with only one hit, the folder, register, or the document is opened. In the **Close (one hit)** area, you specify whether an empty hit list is shown or the message that there are no hits.

### General

Additionally, you can specify that the editor for the free text input opens automatically if a link to an object is added.

**Deactivated users** can be hidden. Deactivated users are users whose accounts have been expressly blocked by the administrator. These users are hidden in all users lists but not in the workflow.

For a full text hit list, a **full text area can be automatically** shown, via which the full text query can be further specified using facets.

With the setting **Close hit list after automatically opening it (one hit)** you specify that a hit list with one hit is automatically closed, if an object is automatically opened for a single hit.

### Open areas at startup

The areas 'Mailbox', 'Favorites', 'Filing tray', 'History' and 'Trash can' can open automatically when starting enaio® client.

## 'More' Area

In the **More** area, you can select from the following options:

#### § **Initialize MAPI at application start**

If this option is selected, you can access the inbox of your e-mail program via the VIEW menu, if the administrator has configured the archiving system accordingly.

If you press and hold the F9 key while starting enaio® client until 'Ready' is displayed in the status bar, enaio® client will not try to open the mailboxes.

This option is not available for IMAP-systems.

This change will take effect after enaio® client is restarted.

#### § **Measure document transfer rate**

The transfer rate for the document display will be shown in the status bar.

**§ Open OS files as read-only**

References to W-documents that you receive as internal e-mail will open as a read-only version if this option is activated. Other documents are always opened as read-only.

**§ Send e-mail via Outlook**

If Microsoft Outlook is set up, you can send e-mail messages from enaio® client using Microsoft Outlook.

**§ Open index data after OCR**

If you use optical character recognition within the display window, the data sheet of the displayed document will be opened after character recognition. You can copy the recognized text from the clipboard to an index data field.

**§ OCR with automatic column analysis**

Using the optical character recognition to automatically calculate the number of columns.

**§ Save scan settings independent of computer**

Scan settings will be saved for every user regardless of the computer.

**§ Only show current messages in subscription**

Only the last change to a subscribed object will be shown in the subscription section.

**§ Hide own notifications in subscription**

Objects you have edited yourself will not show in the subscriptions area.

**§ Show events**

Users which have the right to create events can access enaio® editor for events from their workspace.

**§ Debug application events**

Application events will not be executed all at once, but rather line by line in the event editor. This function also requires a special system role. Access rights and system roles are assigned by your administrator.

**§ Debug workflow events**

Application events will not be executed all at once, but rather line by line in the event editor. This function also requires a special system role. Access rights and system roles are assigned by your administrator.

**§ Set folder as default on desktop**

If you place references to folders on the desktop of the object search, these will, for example, also be presented as suggested locations for archive print.

**§ Show notification for follow-up events**

When follow-up notification arrives, system information can be displayed.

**§ Show notification for subscriptions**

When a subscription element has been received, system information can be displayed.

### § Show notification for workflows

If a work item is active, system information can be shown.

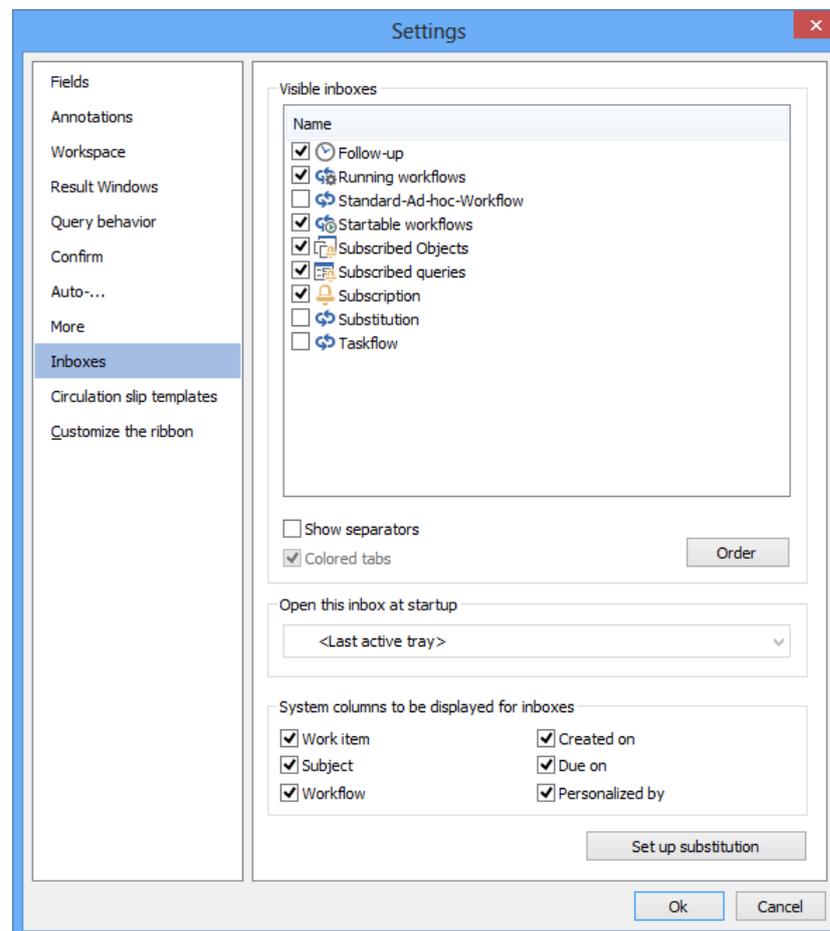
### § Close open windows when opening OS files

You can select whether to close all open windows when opening OS files.

## 'Inboxes' Area

### Visible inboxes

You can define which inboxes are shown.



Follow-ups, subscriptions, and workflows are shown in the main inbox **My incoming messages** if no separate inboxes were specified for these types.

You can create a separate inbox for each workflow. You can specify the **sequence** of the inboxes.

To show objects in the inboxes, you can specify whether separators are shown.

### Open inbox at startup

Specify the inbox to be opened on startup.

### System columns for inboxes

You can specify what system columns are shown or hidden for inboxes.

Work item	Created	Workflow	Subject	Due on	Personalized by
Initialisierung	8/13/2014 4:07:58 PM	Standard-Ad-hoc-Workflow 17			ADMINISTRATOR
Initialisierung	8/13/2014 4:09:21 PM	Standard-Ad-hoc-Workflow 18			
Initialisierung	8/14/2014 8:55:21 AM	Standard-Ad-hoc-Workflow 19			ADMINISTRATOR

### Workflow

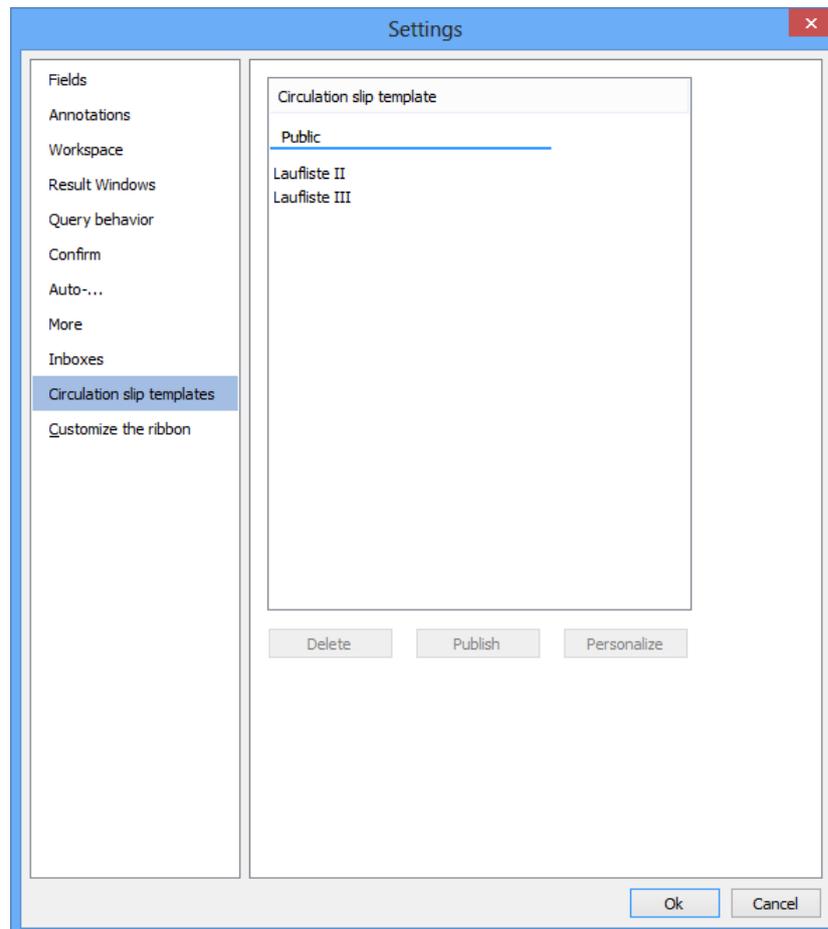
For workflows you can set whether a note that is to be shown when workflows are started in enaio® client is **automatically closed** or not. If this option is disabled, users can close the message manually after the start of the workflow. This avoids users overlooking the message about a started workflow.

In the 'Inboxes' area you also set up the **substitution** for workflows and for follow-ups (see 'Absence and Substitution').

You can directly open the 'Inboxes' area from the context menu of the column headers in the inbox.

## 'Circulation Slip Templates' Area

You can publish circulation slip templates in this area.



Circulation slip templates which you have created for ad hoc activities of the workflow are private and can only be accessed by you. If you publish circulation slip templates, any user of the ad hoc activity can use them.

You can publish, personalize and delete circulation slip templates.

You will require designated system roles to manage private as well as public circulation slip templates. Access rights and system roles are assigned by your administrator.

## 'Customize the Ribbon' Area

In the 'Customize the Ribbon' area you can customize all ribbon tabs.

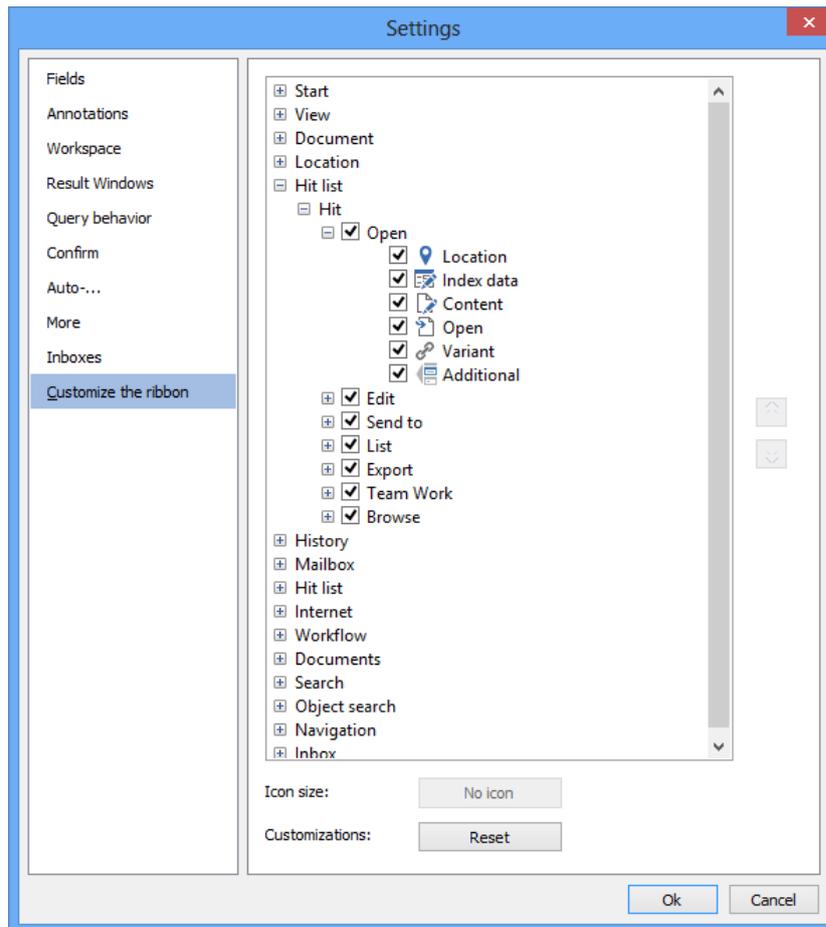
Users need the system role 'Adjust ribbon.'  
Following an update of enaio® client, adjustments to the ribbon and quick access toolbar are automatically reset.

All ribbon tabs are listed with the groups. Groups and buttons can be marked within the groups and moved using the arrow buttons. Buttons can be moved into another group; groups cannot be moved onto another tab.

If you want to hide or show a button or group, disable or enable the check box.

Every button can be displayed with a large or small icon.

You can reset all adjustments using the corresponding interface.



## 'Zonal OCR' Area

Languages can be selected in advance for optical character recognition from the display window of image documents.

From the OCR recognition mode, the dialog for selection of languages can be accessed with **CTRL+Shift**.

This area is only shown if the OCR recognition mode is set up and is licensed on the workstation.

## 'Facets' Area

Full text hit lists are shown with facets. You can switch the basic facets on and off and, for object types, enable fields with list catalogs as additional facets.

The area lists the basic facets and all object types with list catalogs. Open the dialog for enabling/disabling the facets via the button at the end of the line.

## Exporting User Settings

Users can export their settings and import exported settings – also from other users.

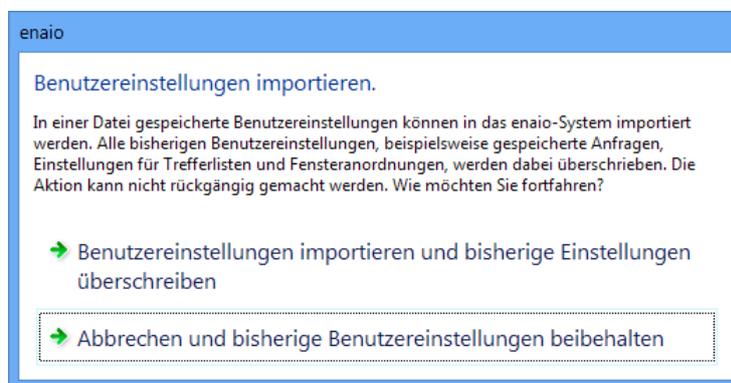
These export data include the saved queries, scan settings, navigation content, links to external applications, the folder structure in the object search, and the tab and window settings.

Links to documents, registers and folders are not exported.

If you want to export your own settings, open the context menu from your user name in the object search and select **Export user settings**.

In the save dialog, enter a name for the file and choose a folder. The data are saved as an encrypted Zip archive.

If you want to import user settings, press and hold **F12** when starting enaio® client.



In the dialog that appears, you can choose whether you want to replace the current user settings with user settings from a file and then select the respective file.

Please note that you are only allowed to import user settings from systems having the same folder, register and document types.

# Capturing Data

## enaio® filing system

enaio® provides a hierarchical structure of folder types, register types, and document types, to administer the documents. This structure will greatly facilitate your document query. The administrator will create folder types, register types, and document types identified by their index data forms. Predefined index data forms allow you to create and index folders and registers. They are furthermore used to search for documents in folders or registers, or to save index data.

### Cabinets, Folders, and Registers

An example: In the **Customer** cabinet there are the **Customer** folders in whose index data the addresses of customers are stored. The folders contain task-specific registers into which customer-specific documents are saved.

### Document types, Register Types, and Folder Types

Register types are assigned to folder types. Registers of a given type can thus be placed into one type of folder only. Document types are also assigned to folder types. Documents of a specific type will always be in a folder of the given type and, optionally, in a register.

### object relations

Additionally, the administrator can preset additional object relations. For example, with object relations, it is possible to specify that documents of a specific type can only be created in the assigned registers type.

### Document Type Assignments

A document type is assigned to documents. The document type defines the query form to be used for the search and the index data to be saved with the document. For documents, specify whether they are archived in an audit-proof manner. Documents are archived in an audit-proof manner by the administrator.

### Modules

The document type also defines which module is used by enaio®. Modules are interfaces to software and hardware used to capture and display documents. Every document type and document has a default icon depending on the module type. The administrator can also assign a different symbol to each document type.

Document types can be configured to be module-spanning. After indexing, you can then select the module to be used for document creation.

The following modules may be at your disposal:



Module for black-and-white images (e.g. scanned documents).



Module for color images (e.g. photos).



Module for grayscale images (e.g. X-rays).



Module for videos (e.g. AVI or MPEG files).



Module for Windows documents (W-Documents).

The module for Windows documents (e.g. MS Word files). W-documents will be created with external applications, e.g. Microsoft Word.



Module for e-mails.



Module for XML documents.

XML documents will be administratively created through data import.



Module for container documents.

With container documents, you can manage several files which are related to one another but may have different data types. Web pages that consist of several HTML files, image files, and style sheets, can be managed as container documents.

### Module licenses

Modules must be expressly licensed for your workstation with a license key. If a module is not licensed for your workstation, the corresponding document types and documents will not be displayed. Open **ENAIIO > Information > Info** to find a list of the modules licensed for your workstation.

## Index Data Forms

The folders and registers you create and the documents you capture for archiving must have an assigned location and must be indexed.

The index data forms of folders, registers, and the different document types are predefined. The administrator creates them and can adjust them quickly to new requirements in enaio® editor.

Customer data	Description	Editing data	Creditor data
Company	<input type="text"/>		
Class	<input type="text"/>		
Street	<input type="text"/>		
Country	<input type="text"/> <input type="text"/>	Zip <input type="text"/>	City <input type="text"/>
Phone	<input type="text"/>	Fax <input type="text"/>	
E-mail	<input type="text"/>		
Internet	<input type="text"/>		

## Requirements

For each and every field of the index data form, the administrator may define **requirements**. Such specifications simplify completion of the form and retrieval.

If you violate the requirements, you will receive an **error message** as soon as you try to save the index data. The respective field will be highlighted yellow.

The administrator can define which and how many **characters** may be entered into a field. For example, only a limited number of digits for a telephone number.

Auto-complete is available for entries in text fields. As soon as you have entered three characters, existing terms that start with these characters are displayed and can be accepted.

## Date and Time Formats

The **date** in a date field must be entered in any of the following formats:

2009.02.01, 2009.2.1, 09.2.1, 20090201, 090201.

For two digit values larger or equal to 50 a 1900 is added. If the value is less than 50, 2000 will be added. If you only enter a day, the current month and year will be added automatically.

Enter the **time** in a time field using the format: 13:12:11.

If you only enter the hours and minutes, seconds will be automatically added with the value 00. If you only enter hours, minutes, or seconds with one digit, a 0 will be added as the first digit.

If you only enter the date into a **date/time field**, 00:00:00 will be added as the time. If you do not enter minutes or seconds, 00 is added in each case. If you only enter hours, minutes, or seconds with one digit, a 0 will be added as the first digit. If you do not enter the year, the current year will be added.

If the administrator enabled local date and time entry in enaio® enterprise-manager, this data will be entered in a format according to regional Windows settings.

## Fields and Buttons

You can navigate between the fields of an index data form with the TAB key or using the mouse.

An index data form may include check boxes. You select checkboxes using the mouse or the spacebar.

An index data form may include radio buttons. Related radio buttons are placed within a group box. You can select one option from the radio button group at a click of a mouse or with the spacebar.

Fields can be predefined, e.g. with the current date.

Some fields may be mandatory fields. Unlike other fields, these must be filled out. Mandatory fields are underlined on the index data form.

Fields may be key fields. The entries of key fields must be unique for each document, folder, or register. enaio® checks whether there is already an existing entry in the index data of another object. Key fields appear in italics on the index data form.

The administrator can set up tool tips to describe the function and special characteristics of the field for every field and every button.

The administrator can install a system-wide security check before saving the index data. Regular users cannot disable these confirmation dialogs.

In addition to fields and elements which have been set up for indexing, graphical elements can also be added to the forms – background images, images, texts, and even windows where internet pages can be shown.

### Catalogs and add-ons

Fields may be linked with catalogs and add-ons.

Catalogs are lists from which you can select entries.

With add-ons, additional features can be integrated into enaio® client. The date add-on, for example, integrates a calendar where you can select a date.

Catalogs and add-ons are operated by buttons which are assigned to the fields or by the shortcut **ALT+DOWN ARROW**.

### Multi-fields

Use multi-fields to index single pages of image documents. Buttons are also assigned to multi-fields.

## Code systems

The following catalog types can be linked to fields:

§  Database catalog

- §  List Catalog
- §  Tree Catalog
- §  Hierarchy Catalog
- §  Structure Tree Catalog

The administrator creates the catalog lists, except for the database catalog, and can also modify them if required.

Open catalog lists through the **Catalog** button to the right of the field or with the shortcut **ALT+DOWN ARROW**.

### Database catalog

To start a query, click on the **Database catalog** button next to a field. A list containing all values which have been entered into this field for indexing is created and opened.

If you have already entered values into this field or into others of the index data form, these will be evaluated in the query. The list will then contain only those values that have been entered before and that the values entered into the other index fields correspond to. If the enaio® query cannot find any value, no list will open.

You may restrict the use of the values which have already been entered:

- § With the shortcut **CTRL+SHIFT+database catalog**, you can restrict the query to the entry in the catalog field.
- § With the shortcut **SHIFT+database catalog**, you can define that no entry from the index data form will be queried.
- § With the shortcut **CTRL+database catalog** you can delete the catalog field entry.

With a click of a mouse, you can select a value from the list. Unlike in other catalog lists, you can also enter new values into the field.

Provided that the database catalog is assigned to a table field of a form, all values will be shown without limitation.

Auto-complete is available for fields with a database catalog. As soon as you have entered three characters, existing terms that start with these characters are displayed and can be accepted.

### List Catalog

Click on the **List catalog** button next to a field to open a list which has been created by the administrator. Select a value from this list.

If you enter characters into the field, a list will automatically open only displaying the list entries that start with the entered characters.

There are different list catalogs from which you can select one or multiple values by pressing and holding the **CTRL** or **SHIFT KEY** and then clicking **OK** to transfer them into the index data form. In the field, multiple values are separated with semicolons. When launching a query, the **Or** and **And** buttons will appear at the bottom of the list. Using these buttons, you can define how multiple values will be logically combined for the query.

Input can be supported by an auto-complete function, which proposes the list entries. When creating or editing, a semicolon can be entered after the first value. Auto-complete then proposes another value. For the search, after the first value you can enter a + for **and** or a semicolon for **or**.

If you enter values not contained in the list, you will get an error message as soon as you try to save the index data form.

You can assign icons to list catalog values to identify documents in hit lists with different icons than the default document type icon.

### Tree Catalog

Tree catalogs are list catalogs in which values are created in different levels and sub-levels. When you click the name of a level, the values of that level are displayed. Tree catalogs are list catalogs in which values are created in different levels. For long lists it is faster for the user to select values using this structure.

To delete a value from the input field, press and hold the **CTRL** key and click on the  tree catalog icon.

If you enter values not contained in the catalog, you will get an error message as soon as you try to save the index data.

### Hierarchy Catalog

The hierarchy catalog corresponds to the tree catalog but only the levels descriptions are transferred to the index data.

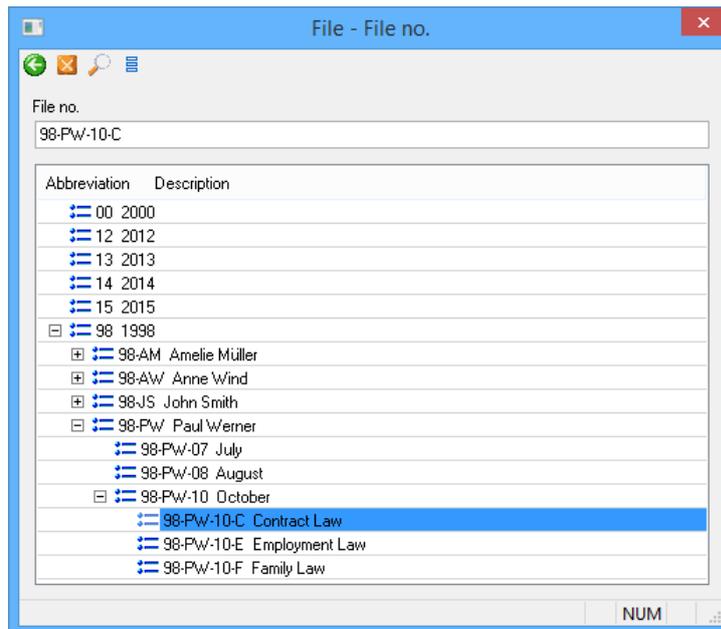
If you select an entry on an intermediate level, the values will be transferred from the first level until this intermediate level. This function may be limited to queries.

If you enter values not contained in the catalog, you will get an error message as soon as you try to save the index data.

### Structure Tree Catalog

The structure tree catalog corresponds to the hierarchy catalog. The tree catalog corresponds to the hierarchy catalog. Names for level names and values are predefined abbreviations from the index data form.

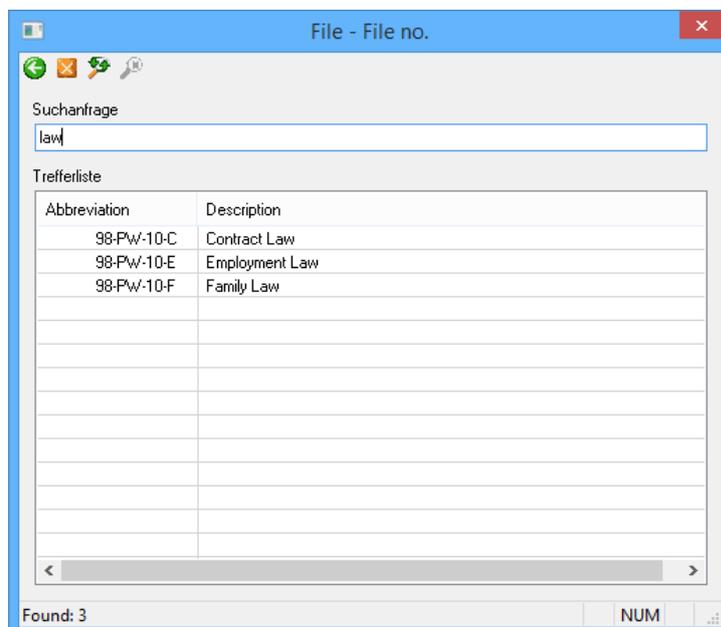
If you click on **Structure tree catalog**, the selection dialog will open.



You can choose between the  tree display and the  list display.

The abbreviation and the description of the last level will be shown. Select an entry to display such an abbreviation. With the  **Apply** button, you can transfer the abbreviation to the field. The  **Cancel** button will close the window without applying the changes. You can search for entries . In the **Search query** field you can enter a search term. The string will be searched for in the descriptions.

Start the search with the  **Start search** button.



If you select a hit, you can use the  **Apply** button to select it in the selection dialog and to transfer it into the field.

If you enter values not contained in the structure catalog, you will get an error message as soon as you try to save the index data form.

## AddOns

Add-ons allow you to integrate additional functions into enaio®. The following add-ons belong to the enaio® delivery package:

- § WWW add-on
- § ID add-on
- § Filing plan add-on
- § Counter add-on
- § Date add-on
- § Conversion add-on
- § User add-on
- § Rights group add-on
- § Catalog AddOn
- § Application add-on
- § Query add-on
- § Quickfinder add-on
- § Address add-on
- § Database AddOn

Optionally, you may receive additional add-ons. For more information on this feature, contact the administrator who configures and links add-ons to fields.

 Fields linked to an add-on will be followed by an **add-on** button at the end of the field which can be used to execute the add-on.

Add-ons can also be executed with the shortcut **ALT+DOWN ARROW**.

### WWW add-on

The WWW add-on is linked with fields where URLs or e-mail addresses are entered. The add-on will then transfer the entry from this field to the browser or to the e-mail program at your workstation.

### ID add-on

The ID add-on will enter a number into the field that it is linked to. This number is unique throughout the archive and will increment with each new entry. A consecutive numbering is however not guaranteed.

### Filing plan add-on

The filing plan add-on enters a counter, a '/' character, and the last two digits of the current year to the index data of the linked field or to parts of the index data of a linked field. The counter is always increased by the value '1' but it can be reset at certain points.

When configuring the add-ons, the administrator will define the index data to be imported from other fields.

If the index data of imported fields have changed, the changes will not be applied to the filing plan field.

### Counter add-on

The counter add-on is the same as the filing plan add-on, but can be more flexibly configured by the administrator.

### Date add-on

You can open a calendar using the **Select date** button. A month view with calendar weeks is displayed. Double-click on a date to transfer it to the field.

### Conversion add-on

The conversion add-on will multiply an entered numeric value by a preset factor and insert the value into an assigned field.

It may for instance be useful for currency conversion.

### User add-on

The user add-on generates a list of all users, user groups, and further configured entries. The administrator can enable the selection of multiple entries.

Using a filter in the first line, the list can be limited to entries that contain character strings entered there.

### Rights group add-on

The rights group add-on will also list all users and user groups. Selected users will be identified with '(U)', groups with '(G)'.

Using a filter in the first line, the list can be limited to entries that contain character strings entered there. For groups, a dialog with the group members can be accessed.

This add-on can be used to provide users and user groups with access rights to archive objects depending on the index data.

## Catalog AddOn

With the catalog add-on, a catalog can be incorporated that functions like a tree catalog or a hierarchy catalog and by which multiple selection is possible.

The catalog add-on can display catalog entries according to the language of the object definition. Imported data are always independent of the set up object definition language.

## Application add-on

The application add-on will start an application which has been configured by the administrator.

## Query add-on

The query add-on enables you to execute a limited query. If you click the **Add-on** button the query is executed and a hit list will open.

The hit list will show documents with a field that has the same name as specified in the add-on. That field is indexed with the entry in the add-on field.

The document types with which you perform searches are administratively preset. You can open the documents from the hit list.

No placeholders can be specified for this query.

## Quickfinder add-on

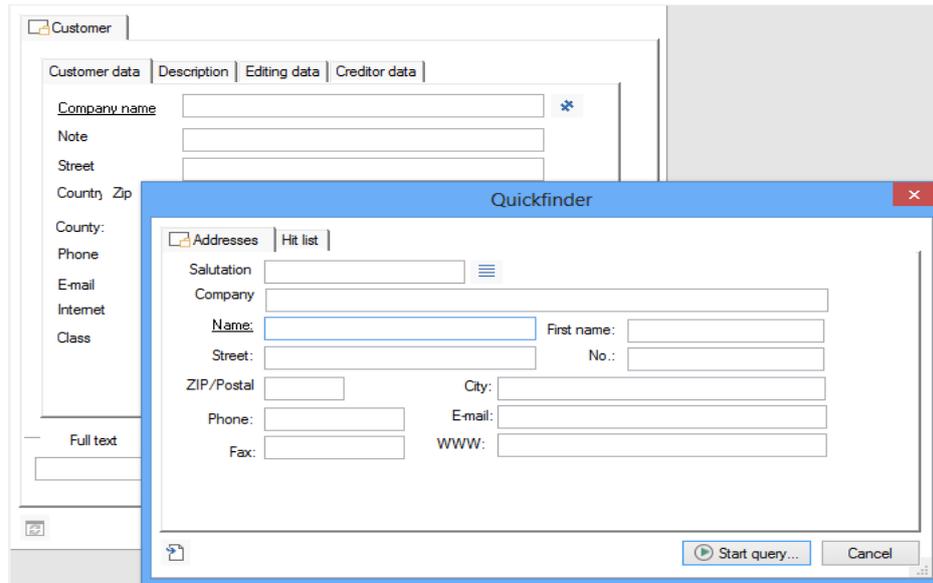
The Quickfinder links a field on the index data form with a field on another archive object's index data form of another archive object. You can only enter values into the Quickfinder field which have already been entered into the index data of the connected archive object.

You may link several index data form fields with each other. Though, there is only one field marked as a Quickfinder field.

If the Quickfinder field is linked to a folder field, you can create a new folder with the Quickfinder.

### **The following restrictions apply:**

- § The index data form opened with Quickfinder contains no add-ons itself even if add-ons are available on the index data form opened in the object search.
- § A subsequent modification of the index data of the connected archive object will not be applied automatically to the Quickfinder field.



Using the Quickfinder in an index data form with a link to a folder

1. Click on **Execute Quickfinder**.

The **Quickfinder** window will be opened with the index data form of the connected archive object.

If you have already entered a value into the Quickfinder field before, a query will start and the Quickfinder window will open with the **Hit list** tab and the query results.

2. Fill out the index data form.

3. Click on **Start query**.

The **Hit list** tab will open.

You can configure the hit list and save settings via the context menu.

4. Double-click an entry in the list.

® The linked values from the index data will be transferred into the Quickfinder field and other linked fields.

If there is no folder with the value you want to enter, you can create one using Quickfinder:

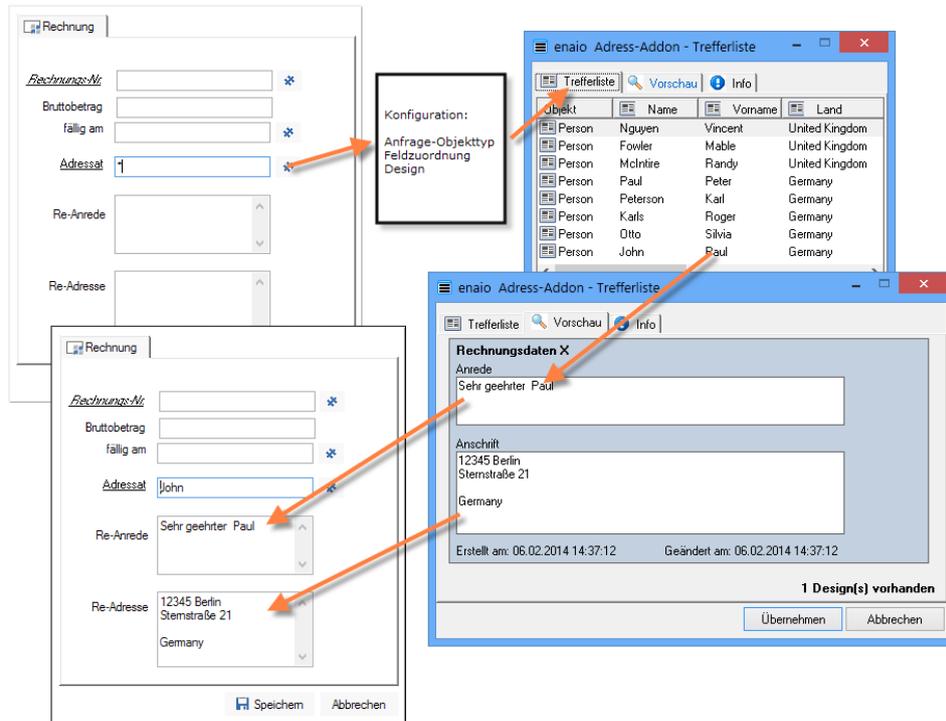
§ Click on **Create object** at the bottom of the window. Fill in the index data form and save the object. It will then be shown on the **Hit list** tab.

The **Create object** feature is only available for folders.  
The Create object feature is available for folders only. You cannot run add-ons on a folders' index data form.

### Address add-on

Use the address add-on to query the data of another object type. A hit list will be displayed and data of a hit can be transferred. These data are formatted with design templates. Choose a design and transfer the formatted data to the index data form.

**Below you will see a data transfer example:**



### Database AddOn

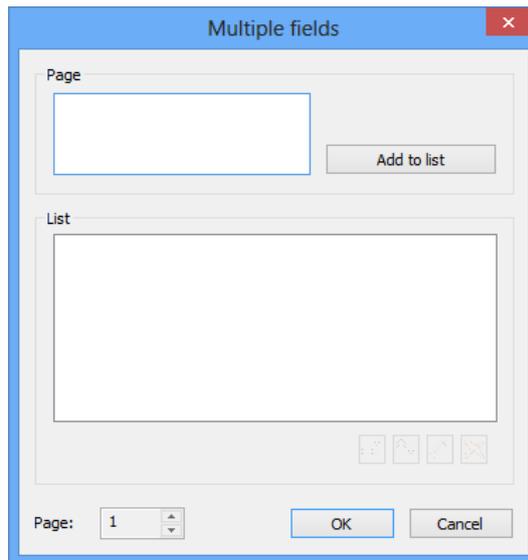
The database add-on queries a database table of an external database. A hit list is displayed where you can select data and transfer them into the field and connected fields.

### Multi-Fields

Multi-fields are indexed with a list of values. Every page of an image document, i.e. each image, can be indexed with an individual list of values.

- Multiple fields are marked with a button on the index data form but not on the query form.

Click the button or press and hold **ALT+DOWN ARROW** to open the **Multi-fields** window.



Into the upper text area enter the values. Clicking the **Add to list** button will copy the values from the list to the text area below.

You can sort the list entries with the buttons in the **List** area. Selected entries in the list may be  edited or  deleted.

Confirm with **OK** in order to save the values and to reopen the index data form. Click **Cancel** to undo all changes in the multi-field.

Every page of a document can be indexed with a list of values. When creating a new document, however, only the first page can be indexed. The remaining pages can be indexed once they have been received.

Multi-fields can only be indexed from the **Multi-fields** window. These are displayed on index data forms and query forms at the bottom of the form in a separate area.

While the **Multi-fields** window is open, no other user can access the document.

## Creating Folders

Folders are created with the index data form of an existing document type. Register types and document types that can be created inside the folder are assigned to the folder type.

The screenshot shows a 'New' dialog box with a 'Customer' folder icon at the top left. Below the folder icon are four tabs: 'Customer data', 'Description', 'Editing data', and 'Creditor data'. The 'Customer data' tab is active, showing a form with the following fields: 'Company name' (with a blue asterisk icon), 'Note', 'Street', 'Country' (with a dropdown arrow), 'Zip' (with a dropdown arrow), 'City' (with a dropdown arrow), 'County:' (with a dropdown arrow), 'Phone' (with a blue asterisk icon), 'Fax' (with a blue asterisk icon), 'E-mail' (with a blue asterisk icon), 'Internet' (with a blue asterisk icon), and 'Class' (with a blue asterisk icon). At the bottom right of the dialog are 'Save' and 'Cancel' buttons, and a checkbox labeled '...open after saving' which is checked.

Follow these steps to create a folder:

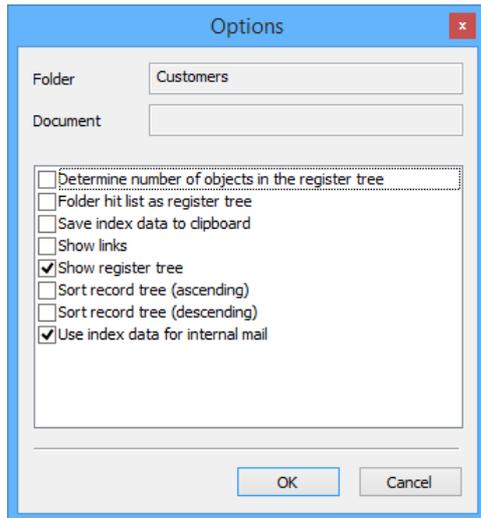
1.  On the **START** ribbon tab, click on the arrow button to the Folder button. A menu with all available folder types will open. The most recently selected type will appear in bold text. You can select it directly using the Folder button.
2.  Choose a folder type from the list. The index data form opens.
3. Fill out the index data form.
4. Decide whether or not to open the folder after saving. The selected setting remains in place for the next time a folder is created.
5. Click **Save**.

Ⓡ The folder will be created.

Folders can also be created using **New** in the context menu of a folder hit list (see Folder Hit List') or using the folder icon in the object search.

For each folder type, you can decide whether or not to cache the recent index data and automatically insert them into a new index data form.

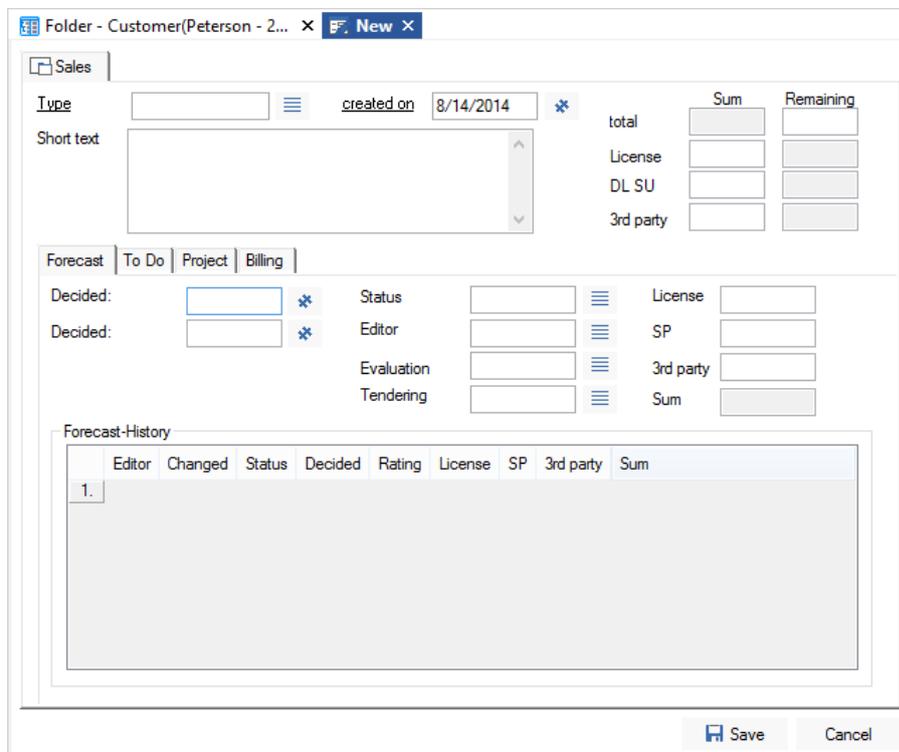
These settings can be specified in the **Options** window. The window can be opened from the **Options** item from the context menu of the folder type in the **object search** area (see 'Object Search').



Select the item **Save index data to clipboard** if you want to cache the entries from the folder index data form.

## Creating Registers

Registers must be placed in a folder. The administrator sets up the register types and assigns them to a folder type. Over object relations, further requirements can arise. Registers of a specific type may be required to be placed into registers of a specific type.



Follow the steps to create a register:

1. Start a folder query from the object search (see 'Folder Queries').

2. Open a folder from the hit list.  
Open a register if you want to place the new register into another register.
  3.  On the **Folder** ribbon tab, click on the arrow under the **New** button.  
The menu with the register type and all configured document types will open. The register or document type you have selected most recently will be in bold. You can directly select it using the **New** button.
  4.  Select the register type from the list.  
The index data form opens.
  5. Fill out the index data form.
  6. Click **Save**.
- Ⓜ The register is created and will open.

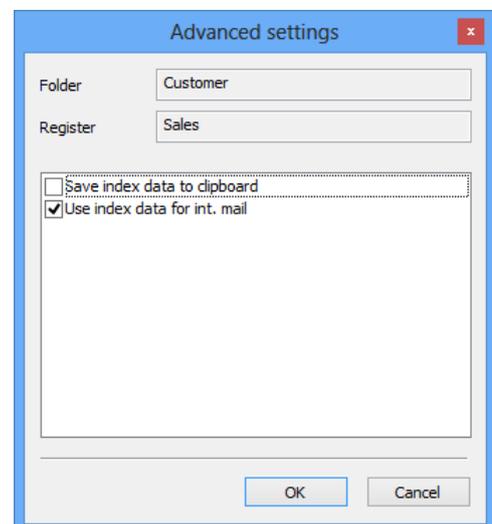
You can also create registers via the context menu or by dragging the register type icon from the **Object search** into an open folder or register window.

### Register type settings

For each register type, you can decide whether or not to cache the recent index data and automatically insert them into a new index data form.

These settings can be specified in the **Options** window. The window can be opened from the **Options** item from the context menu of the register type in the **object search**.

Select the item **Save index data to clipboard** if you want to cache the entries from the register index data form.



## Capturing Documents

Documents to be captured must be placed into a folder of the assigned type and indexed. Over object relations, further requirements can arise. Thus, documents of a specific type may be required to be placed into registers of a specific type. Documents to be captured must be placed into a folder of the assigned type and

indexed. Over object relations, further requirements can arise. Thus, documents of a specific type may be required to be placed into registers of a specific type. Similarly, the number of documents which can be placed into one location may be limited.

You can add documents to a **folder**.

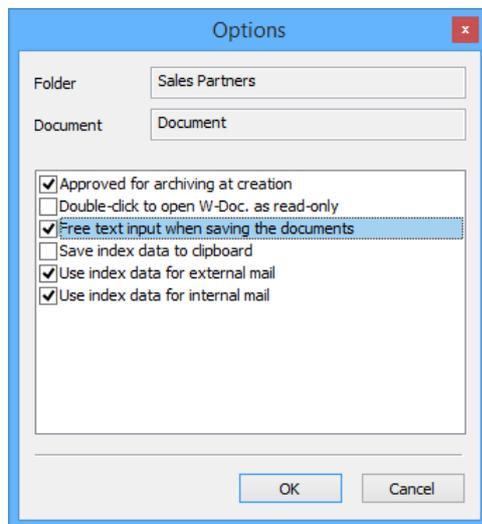
You can add documents to the **filing tray**. The filing tray is part of your private work space. It will not be searched during a query for documents. You can add documents to your filing tray without indexing. However, you can only move them from the filing tray to the archive after indexing them.

### Document types and index data

Documents you want to capture and index must be given a document type. The document type defines the index data form to be filled in and the module to be used. For module-panning document types, you select a module after indexing.

For each document type, you can set whether recent index data is cached and automatically inserted into a new index data form, and whether documents of that type should be approved for archiving.

These settings can be specified in the **Options** window. The window can be opened from the **Options** item from the context menu of the document type in the object search.



You can also define that a read-only version is opened when double-clicking Windows document types. External e-mails can be configured to use the index data as file name.

You give documents the property 'approved for archiving' or 'not approved for archiving.' To do so, you will need the appropriate system role. The administrator will then archive them.

The option **Free text input when saving the document** allows you to enter a short text that is shown in the editing history before the document is saved.

After having indexed the document, you can create the document with the associated module.

### Special documents

Documents without pages consist only of index data (see 'Documents without Pages').

E-mails can be copied from an e-mail inbox into a folder or a register (see 'E-Mails').

From Windows applications you can transfer documents directly to enaio® using the functions of an add-in.

XML documents will be created via a data import. Container documents allow you to group any number and any kind of documents from the file system into a container (see 'Container Module').

### Archive transfer

You can drag and drop available files to the archive. Then specify the document type and index the document with the type-specific index data form. If a file cannot be imported due to its file format, you will be notified about it.

### Images from the clipboard

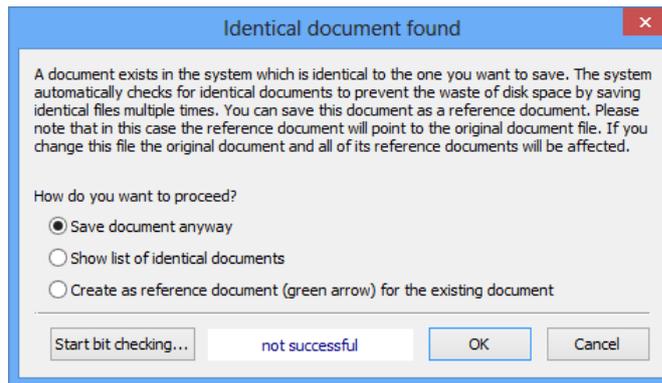
Using the insert command **CTRL+V**, images can also be copied directly from the clipboard to a folder, a register, or to the filing tray and created as a new document there. As with drag & drop, when inserting you select a suitable object type from a selection dialog, depending on the image format. Direct insertion from the clipboard makes it easier, for example, to work with image photos, or enables images to be copied directly from scan dialogs or graphic applications and created as a document in enaio®.

### Internet documents

If you drag a document link from the Internet browser over a file window, the location will be imported. JPEG files shown in the browser can be dragged directly into a folder window.

### Identical documents

For the import of available documents, the administrator can activate the option that checks whether these documents already exist in the system (W-documents are compared with the active variants in the variant administration). This comparison prevents documents from being accidentally imported more than once.



The use of hash values makes the comparison check very reliable. Nevertheless, it can happen that two documents with the same hash value are not identical. You have therefore the possibility to start a bit check.

If you want to show a list of identical documents, a portfolio (see 'Portfolios') is compiled with these documents.

## Adding Documents to a Folder

1. Start a folder query from the object search (see 'Folder Queries').
2. Open a folder from the hit list.  
Open a register if you want to place the new document into a register.
3.  On the **Start** tab, click the arrow to the **Object** button or select **New** from the context menu.

The menu with configured document types will open. The type you have selected last will be bold. You can select it by clicking **New** or by pressing and holding **CTRL+H**.

4. Select a document type from the list.  
The index data form opens.
  5. Fill out the index data form.
  6. Click **Save**.
- ® The assigned module will open (see 'Modules'). In case of Windows documents, the assigned Windows application will open (see 'Windows Module').

You can also create documents by dragging the document type icon from the **Object search** into an open folder or register window.

After having filled in and saved the index data form of a Windows document, cancel the process offered next to receive a document without pages (see 'Documents without Pages').

## Adding Documents to the Filing Tray

Documents to be captured can either be assigned to a document type indexing them immediately or you can import them without any type into the filing tray. Documents without any type do not need to be indexed and cannot be put into the archive either.

### Saving Documents with a Document Type

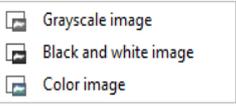
Follow these steps to create a document with a document type in the filing tray:

1.  Open the filing tray using the **VIEW** tab.
  2.  On the **START** tab, click on the arrow to the **Object** button.  
The menu with configured document types will open. The document type you have selected last will be bold. You can select it by clicking **Object** or by pressing and holding **CTRL+H**.
  3. Select a document type from the list.  
The index data form opens.
  4. Fill out the index data form.
  5. Click **Save**.
- Ⓜ The assigned module will open (see 'Modules'). In case of Windows documents, the assigned Windows application will open (see 'Windows Module').

### Filing Documents Without a Document Type

Follow these steps to create a document without a document type in the filing tray:

1.  Open the filing tray using the **VIEW** tab.
  2.  On the **START** tab, click the arrow to the **Folder** button or select **New** from the context menu.
  3. Click **without type** on the list.  
The select module dialog will open.
 


  4. Select a module.
- Ⓜ The selected module will open (see 'Modules').

You can only choose an image module for which a document type has been configured. Windows documents cannot be filed without a type.

Documents without type are not versioned.

## Modules

After capturing and indexing a document, the module assigned to the document type or manually selected will open. With the modules you can create new documents. For a W-document, the associated W-program will open.

The following modules may be at your disposal:

-  The module for black-and-white images (e.g. scanned documents).
-  The module for color images (e.g. photos).
-  The module for grayscale images (e.g. X-rays).
-  The module for videos (e.g. AVI- or MPEG-files).
-  The module for Windows documents (e.g. MS Word files). W-documents will be created with external applications, e.g. Microsoft Word.  
The module for Windows documents (e.g. MS Word files). W-documents will be created with external applications, e.g. Microsoft Word.
-  The module for e-mail.
-  The module for container documents.  
With container documents, you can manage several files which are related to one another but may have different data types.  
Web pages that consist of several HTML files, image files, and style sheets, can be managed as container documents.

The interface and usage of the image modules are very similar. If you import existing files using a module, they will be saved in the file-format of the respective module. The image module can also manage documents in PDF format.

Document types can be configured to be  module-spanning. You can select a module to be used after indexing.

Documents without pages, which were set up by the administrator, are identified by this icon: 

 XML documents will be administratively created through data import.

## Scanning using Image Modules

Scanning will involve a slightly different process, depending on whether you use a Twain or a Kofax interface.

### Setting scan parameters

#### Scanning with Kofax

 Before scanning, click on the **Set scan parameters** button to set parameters such as resolution. You may save the set scan parameters for various

templates and retrieve them later from a list of saved scan settings.

### Scanning with Twain



Use the **Select scanner** button to select the Twain source. Scan parameters can be set in your scanner's settings dialog.

Optionally and analogous to scanning with Kofax, you can install a component at your workstation that enables you to save set scan parameters for various templates and retrieve them later from a list of saved scan settings.

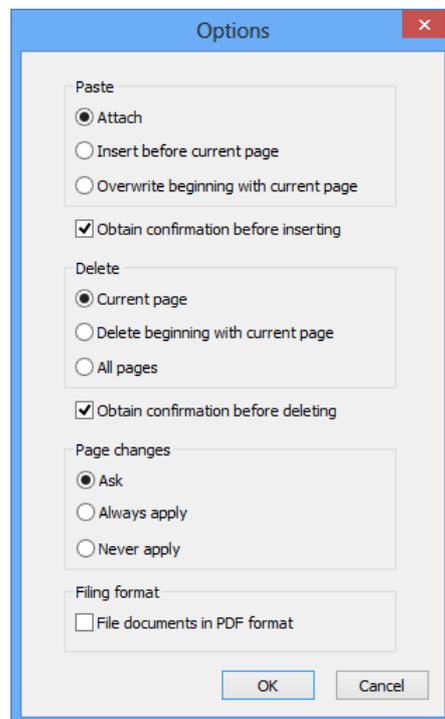
These components are not supported by all TWAIN scanners.

### Setting options for insertion and deletion

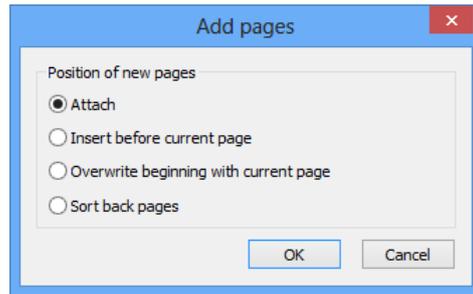


The insert options can be used to configure the order according to which document pages are merged. The delete options allow you to define whether to additionally ask for confirmation when deleting a page.

The Insert/delete options dialog can be opened with a click on the **Options** button.



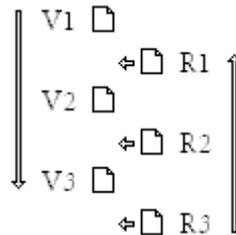
If you enable the option **Obtain confirmation before inserting**, a dialog will open after you have scanned or imported pages in which you indicate the position of new pages.



The option Sort back pages enables you to sort front and back pages scanned with a single-sided scanner.

First, you scan the front sides (F1 to F3), leaving the last page active, then turn the batch over and scan using the option Sort back pages (R3 to R1) to scan the back sides.

The pages will be sorted as shown in the diagram below.



In the Page changes area, you can specify whether to automatically apply the changes made to pages by rotating them when switching to another page or to open a confirmation dialog.

If you select PDF format for filing, the images in all documents of this document type will be managed in PDF format.

This format is limited in several ways:

Annotations on layers can only be displayed in the image module. For all other actions, for example, when mailing or exporting an image document in PDF format, the PDF file without any annotations will be used.

The image module also prints the PDF file, thereby requiring considerably more time and resources than the print-out of a PDF file administered through the W-module.

## Scan

### Scanning with Kofax



Start the scanner using the **Scan** button. The inserted page will be scanned. The scanned page will then be shown. You can scan more than one page in succession. They will be attached to one another as specified in the insert options. If you use a scanner with automatic page feed, all inserted pages will be scanned.

### Scanning with Twain



Start the Twain scanner using the **Scan** button. The settings dialog of the scanner will open. In this dialog, set up and confirm the properties. The

inserted page will be scanned and displayed.

### Checking scans

You will find the following buttons on the ribbon tab **Scan** in the Image editing group:

-  You can go to the first, previous, next or last page in a multi-page document. If you press and hold CTRL+SHIFT, you can move a selected page within the document.
-  Rotate the current page 90° clockwise or counter-clockwise.
-  Zooms in to or out of the document in the display window.
-  Adjusts the page view to the width of the display window.
-  Fits the document display into the display window.
-  Activates zoom mode. You can drag a rectangle with the mouse and the rectangular content will then be enlarged to the size of the window.
-  This button activates the panning mode. Holding the mouse button pressed allows you to pan the document across the screen.
-  This button activates the highlighting mode. With the mouse button pressed down, select an area of the image and copy the area to the clipboard with CTRL+C. From there you can copy the cached area into external applications. Disable the selection in order to insert image data from the clipboard using CTRL+V.  

The position of the selected area can be copied to the clipboard with ALT+C. This data can be used in enaio® capture for the field configuration.

If you do not select an area, you will duplicate the current image by pressing and holding CTRL+V. If you select an area, you can add it as a new document page or overwrite the current page with CTRL+V. This feature is similar to the clipping feature of graphic applications.
-  Activates the OCR mode (see 'Optical Character Recognition').
-  This button inverts the image colors.

The context menu offers this additional feature:

-  **Basic settings**  
Here, you can configure basic window settings (see 'Document Display Window').



### Dock

In docking mode, if you rotate or zoom a document page, all the other document pages will be rotated or zoomed, as well.



This button shows/hides the page preview. The page preview displays thumbnails (preview images) at the left margin of the display window. Drag this area to increase its width and to see various thumbnails at a time.

## Import image files



### Import

You can import images. Images must be available as TIFF, JPEG, BMP, PCX, DICOM or TARGA files. They will be converted to the data format of the module. Color images, for example, imported into the black-and-white module will be converted into black-and-white images.

You can only import images requiring less than half of the available RAM when uncompressed.



### Delete Pages

You can delete scanned pages from a document. In the Insert/delete options dialog, you can decide which pages you want to delete and whether deleting them requires confirmation.



### Move Pages



The page order within the document can be changed. Select an image and press and hold CTRL+SHIFT. Now move the page with the arrow buttons by one position back and forth and to the end or beginning of the document, respectively.

Using the LEFT ARROW and RIGHT ARROW keys you can also move the pages by one position back and forth.



### File document

Click the **File document** button. The document will be filed into the folder, register or filing tray.



### Exit

Click **Exit** or **Close** on the title bar of the scan window.

The keyboard shortcuts can be found in the section 'Key Assignment for the Document Display Window'.

Image document types can be indexed page by page in multi-fields (see 'Multi-Fields').

## Batch Scan

With the image modules, you can also scan and import multiple images, distribute these images to different documents, and finally, assign the documents to a

document type and index them. All documents created with this batch scan function will receive the same location (a folder or the filing tray).



The **Scan** button can be found in the menu tab **Folder and Filing Tray**.

Select the module first: grayscale, black-and-white or color. The module will open.

In contrast to the capture of single documents, during batch scan a list will appear to the right of the window. Therein, all batches created through scanning or importing of single pages will be listed.



Once you have scanned or imported pages, a batch containing all pages is created.

You can then split the batches:

1. Select one or more pages in the page preview area.  
The selected pages will appear bordered.
  2.  Click the **New document** button.
- Ⓢ The selected objects will be merged as batch into a document. The batch will be added to the list.

If you have not selected any pages, you can merge pages by browsing to the page with which a new document is designated to start and clicking the **New document** button. All pages, from the current one until the last page, will be merged into a new batch.

You can use the context menu of a batch to delete it. If you select more than one batch in the list, you can also merge them into one batch with the context menu.

After splitting the pages, you can file the batch as a document.

1. Select a batch from the list.  
The pages assigned to the batch will be displayed.
2.  Click the **File to** button.  
The document types assigned to the module will be listed.
3. Choose the intended document type.

The index data form opens.

4. Index the document.
5. Save the document.
6.  Close the scan window.

Refresh the display window if the new document does not appear in the list.

## Video Module

The video module allows you to load videos which are already available in MPEG or AVI formats.

When creating a video document, the video module will open after indexing.



The **Import** button enables you to select a video in a file selection dialog.

The video module will open the video with the application that the operating system associates with the file type 'video clip,' for example, the Windows Media Player.

Videos can be viewed, but not edited.



The **File document** button enables you import the video into the archive.

You can only allocate videos to video documents.

## Windows Module

With the Windows module you can create Windows documents.

Windows documents (W-Documents) are documents created with applications such as MS Word, Excel, etc. You can create, manage, and edit such documents in enaio® blue.

W-documents must be associated with a defined document type and, consequently, with a Windows program; thus, they can be placed into the filing tray only if they have been assigned to a type.

When creating a W-document, the video module will open after indexing. There, you can create the document as usual, and afterwards save it under the already provided name.

Depending on the Windows application, the administrator may provide access to additional features.

## Applications

You can use applications. Applications are files similar to templates in Microsoft Word. Applications may contain placeholders. In place of the placeholders, you can use enaio® blue data-transfer to insert data sheets entries or content from other documents into your Windows document.

### External and internal W-application

The administrator can choose whether to configure the W-program as an external or internal program. External programs run independently of enaio® client while internal programs will be integrated into the program window of enaio® client.

From W-applications set up as internal applications, no data import with enaio® data-transfer is possible.

### Transfer of independently created documents

Documents created outside of enaio® can be simply archived, as long as a W-application has been set up for the program with which the document was created before.

Drag and drop the document icon from the Windows Explorer into an open folder window or register window. enaio® will identify the document type. If there is more than one possible type, they will be displayed in a list. Select the intended type from the list and index the document.

An e-mail attachment can also be dragged and dropped onto an open folder or register window in the same way. For example, a PDF document link in a web browser can be dragged onto a folder or register window to import the document into the archive.

enaio® office-utilities or enaio® add-ins allow you to file documents from various applications into the archive at the click of a button.

### Checking in W-Documents

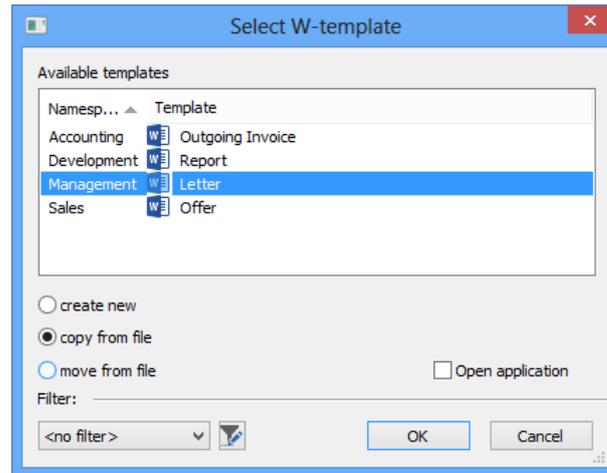
W-documents must be checked in manually or automatically after they have been created. Other users can only edit checked-in documents.

W-documents can only be checked in at the workstation that they have been checked out from.

### Creating a Microsoft Word Document

Windows documents can only be managed and edited in enaio® client as described in this example, after the administrator has installed the Windows module, set up the relevant document type, created applications, and installed enaio® office-utilities.

1. Open a folder or the filing tray.
2. Click the **New** button to select a W-Document type.  
The index data form opens.
3. Index the document.
4. Click **Save**.  
The window Select W-Template will open.



5. Select a Template.

Templates are assigned to a namespace. Click on the column headers to sort the templates.

Filters can be used to have a better overview if you have of a large number of templates.

6. Select one of the following options:

§create new

The application file will be loaded.

§copy from file

A copy of the file you select is imported into the archive and is opened in Microsoft Word if you select the **Open application** option. If you do not choose the **Open application** option, the file will be directly archived.

§move from file

The file you select is imported into the archive and is opened in Microsoft Word if you select the **Open application** option. If you do not choose the **Open application** option, the file will be directly archived. It will be additionally deleted at its original location.

For each document type the last selected option is saved user-specifically and preset at next creation.

7. Click **OK**.

If you have selected **Create new** or **Open application**, Microsoft Word will open. You can then create the document.

8. Start the data transfer via enaio® office-utilities.

The function will replace the placeholders in the text with entries from the data sheets.

9. Save the document.

The document will be filed into the folder or the filing tray.

10. Switch to enaio® client.

The document is now displayed with a little yellow padlock.

11. Select the document.
  12. Open the context menu with a right-click on the document.
  13. Select the function **Check in document**.
- ® The document is no longer marked with a yellow padlock. It can now be edited by other users.

You must save the document under the given name and path; otherwise an empty document will be put into the archive. You cannot use the options **copy from file** or **move from file** to put files to which the administrator has not assigned editing applications into the archive.

Some work items can be automatically executed with enaio® office-utilities.

## XML module

 XML documents will be administratively created through data import. The administrator assigns style sheets to the XML document types for display (see 'Showing XML Documents').

You can import existing XML documents into the archive. Create a new document of type XML; the file selection dialog will open after the document has been indexed. The selected file will be imported into the archive.

## Container Module

Documents can consist of various files with differing data types. Web pages, for example, may comprise HTML files, image files, and style sheets. Such documents are created and edited with applications that handle files stored in directories as well as complex directory structures.

With the container module you can manage documents of this type. If you create a container document, a container will be created after indexing the document. The file selection dialog will then let you import the content of entire directories into the container. The content will be compressed and saved in a zip archive.

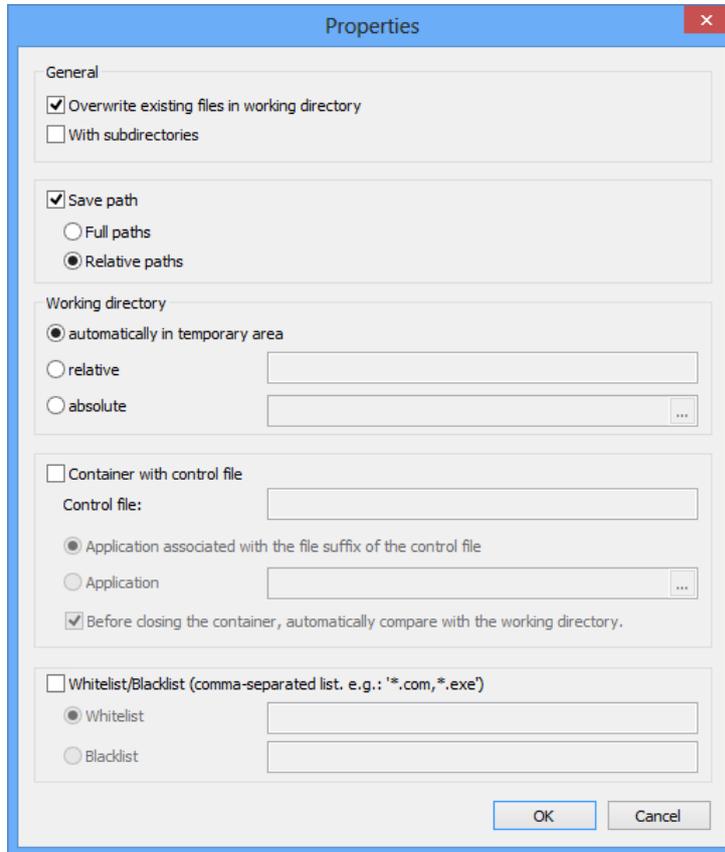
For editing, the content will be decompressed into the chosen directory. One file of this directory can be marked as a control file and opened in an associated application. After editing, the directory contents including all changes and newly added documents can be retransferred into the archive.

Zip archives have a maximum size of 2 GB. If this size is exceeded, file comparison and file addition will fail and create an error message.

## Container Properties

If you create a  container document, an empty container will be created.

 Open the properties dialog:



You can choose the following properties:

**General**

**Overwrite existing files in working directory**

To open the document, the files will be extracted into a working directory. If the working directory already exists, available files having the same name will be replaced without confirmation as long as this option is enabled.

**with subdirectories**

Enable this option to import the directory content as well as all files from subdirectories.

**Save path**

**Full paths**

In case files of subdirectories were transferred, full paths can be stored.

**Relative paths**

If files have been transferred from a subdirectory, paths can be saved relative to the added directory.

**Working directory**

**automatically in temporary area**

The directory for container files will be created in the user-specific temporary directory `...\Local`

Settings\Temp\OSTEMP.

#### **relative**

Enter the name of the working directory. This directory for container files will also be created in the temporary area

...\Local Settings\Temp\OSTEMP.

#### **absolute**

Enter the location where the working directory for container files will be created.

Container with control file

#### **Application associated with the file extension of the control file**

If you select a container file as control file, it will be transferred to the application which the operating system associates with the file extension.

#### **Application**

A file selection dialog allows you to specify the application with which the control file will be opened.

#### **Before closing the container, automatically match with the working directory**

Close the container and all documents that have been changed will be updated automatically.

Whitelist/Blacklist

#### **Whitelist**

You can list all files to be managed in the container. In the names, use the asterisk '\*' placeholder for any type and number of characters. Multiple items are separated by commas, for example \*.html,\*.gif,\*.jpg,\*.css.

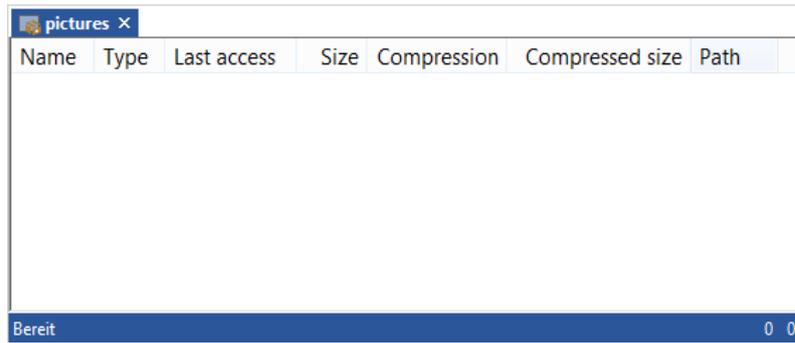
All files that match these patterns will be added and aligned.

#### **Blacklist**

You can list the data types to not be managed in the container. All files that do not match any of the patterns will be added and aligned.

## Container Management

After you have entered the container properties, the empty container will be displayed.



The ribbon tab **Container** contains the following functions:

**Container**



**File**

All data will be saved, the container document will close and checked-in.



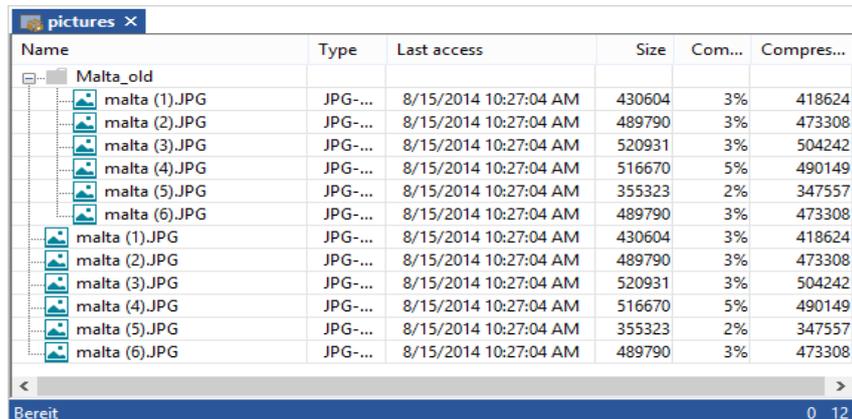
**Options**

The properties dialog will open. You can view and edit the container's properties.



**Folder view**

Turn the folder view on and off with this button. In the folder view, all container files and the folder structure will be shown.



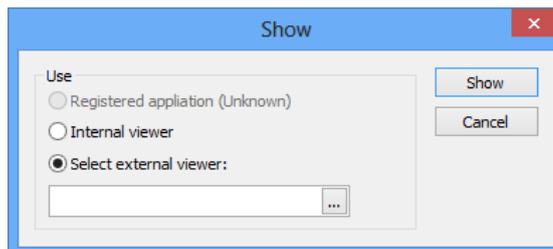
With disabled folder view, all files will be shown in a list. The file paths are shown in a separate column.

**File**



**Display**

If you would like to display a selected file, call the following program:



The file can be displayed with the program the operating system associates with, with an ASCII viewer, or with any program of your choice.

The file to be displayed will be extracted into the user-specific temporary directory and open.

Changes cannot be transferred to the database.



### Import

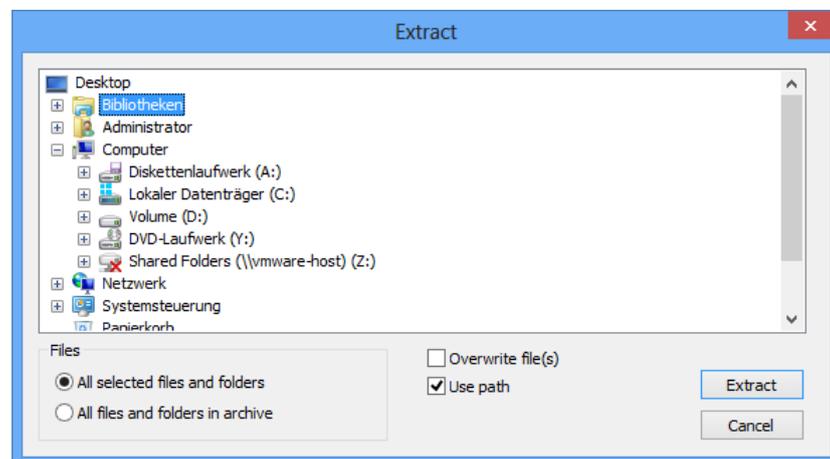
The file selection dialog opens. Choose the directory of which content is designated to be imported into the container.

If you have configured a Whitelist/Blacklist, only matching documents will be added, if you have selected the **With subdirectories** option, the matching documents of subdirectories will also be added.



### Export

You can extract files from the container. However, if you modify the extracted files, these changes will not be transferred into the system.



You can specify a folder and choose the following options:

#### Files

Specify whether to extract the previously selected or all files.

#### Overwrite files

If files with the same identifier already exist in the chosen directory, they will be overwritten, even if they are write-protected.

#### Use path information

If paths for files have been saved, these paths will be used when extracting.



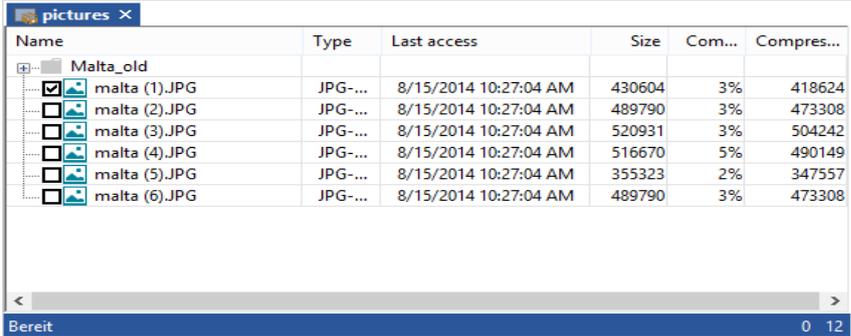
#### Delete

Selected files will be removed from the container.

This deletion cannot be undone.

## Control File

If you determine in the properties dialog that the container should include a control file, a file in the container can then be selected as control file.



Name	Type	Last access	Size	Com...	Compres...
Malta_old					
<input checked="" type="checkbox"/> malta (1).JPG	JPG-...	8/15/2014 10:27:04 AM	430604	3%	418624
<input type="checkbox"/> malta (2).JPG	JPG-...	8/15/2014 10:27:04 AM	489790	3%	473308
<input type="checkbox"/> malta (3).JPG	JPG-...	8/15/2014 10:27:04 AM	520931	3%	504242
<input type="checkbox"/> malta (4).JPG	JPG-...	8/15/2014 10:27:04 AM	516670	5%	490149
<input type="checkbox"/> malta (5).JPG	JPG-...	8/15/2014 10:27:04 AM	355323	2%	347557
<input type="checkbox"/> malta (6).JPG	JPG-...	8/15/2014 10:27:04 AM	489790	3%	473308

This control file will be opened by the associated or specified application if you edit the container document and select the corresponding option (see 'Editing Container Documents').

## Archive Print

Instead of managing archived W-Documents in their own formats, you can use the enaio® printer to convert W-Documents to PDF or image documents.

Files in these formats are much smaller than W-documents and their content cannot be edited that easily.

You can manage a W-Document in both formats: in its own file format or also as an image or PDF document. You can then continue to edit the document in the Word application and also have a document that can be archived so that it is audit-proof.

For archive printing, the AS printer for black-and-white printing and the AS color printer for color printing are installed. For the AS printer the administrator can set PDF as the print format. If you enable a confirmation in the 'Confirmation' area, instead of PDF you can select the file formats TIFF G4 for black-and-white printing and JPEG for color printing.

The intended printer driver is selected in the print dialog of W-applications.

After printing, assign the document to an open folder or the filing tray. To do so, go to **View > Settings > More** and enable the option **Set folder as default on desktop**. Now, you can assign the document to all folders for which you have created references in the workspace.

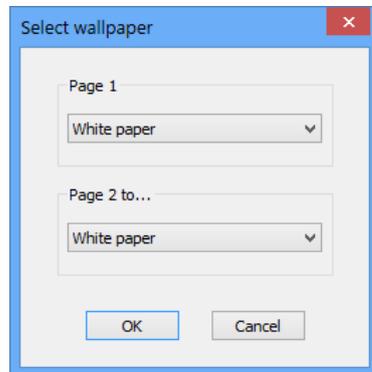
You can choose a document type or place a document without type into the filing tray. If you choose a type, you can index the document with the index data form.

The documents are managed and edited in the same way as image or PDF documents.

## Printing Documents to Archive

1. Make sure that enaio® client is running.
2. Start a Windows program.
3. Create a document in the Windows program.

- In the print dialog of the Windows application, select an AS printer as print driver and start printing. Depending on the printer selection and configuration, you can choose whether to file the document as PDF. For the AS printer, the dialog window **Select background** is opened.



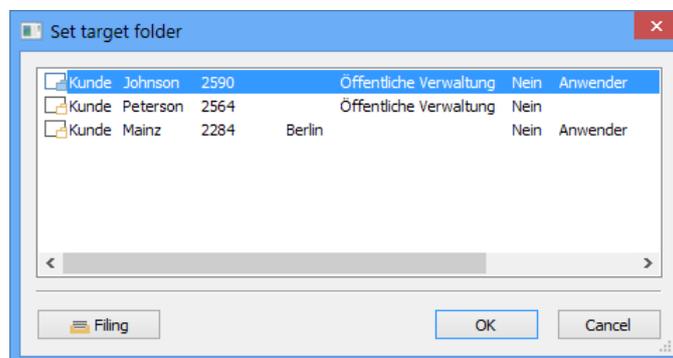
- Select a wallpaper.  
You either may select different wallpapers for the first and the following pages or use the same for all pages.

The administrator is the person in charge that provides you with wallpaper images.

- Click **OK**.

The document is printed to a file.

The dialog window **Set target folder** is opened.



All folders which are open in enaio® will be listed.

If you have configured the option **Default folder** in the **View > Settings > More** menu, all folders located on the desktop of the object search will also be listed.

- Choose a destination folder or the filing tray.  
The document types available in enaio® will be displayed.
  - Select a document type.  
The index data form of the selected document type will open.  
Documents without a type can be filed into the filing tray.
  - Fill out the index data form.
  - Click **Save**.
- Ⓜ The document will be saved in the selected folder or the filing tray.

Only the open folders in enaio® client can be chosen as destination folders.

You can also open an existing W-Document from the archive and use the AS printer to additionally save it as a PDF document.

## Documents without Pages

Documents without pages consist only of the index data. In enaio®, the administrator may configure such document types without pages in order to manage information in the archive.

You can also use any document type to create documents without pages. Later, you or other users can add pages to these documents (see 'Editing Image Documents').

Documents without pages, which have been configured by the administrator, can be created just as any other document. After indexing, the document will be saved immediately. These documents cannot contain any pages.

To create documents without pages for a given document type, press and hold **CTRL** and **Shift** while selecting a document type. The index data form opens. The keyboard shortcut **CTRL+N** will open the index data form of the recently used document type.

After indexing, the document will be saved immediately without opening a module. Documents without pages are not indicated by an archiving icon, but with the following icon: . If they have been configured by the administrator, they will have a special icon: .

Documents without pages can also be searched using their basic parameters.

## E-Mails

In enaio®, you can also manage e-mails.

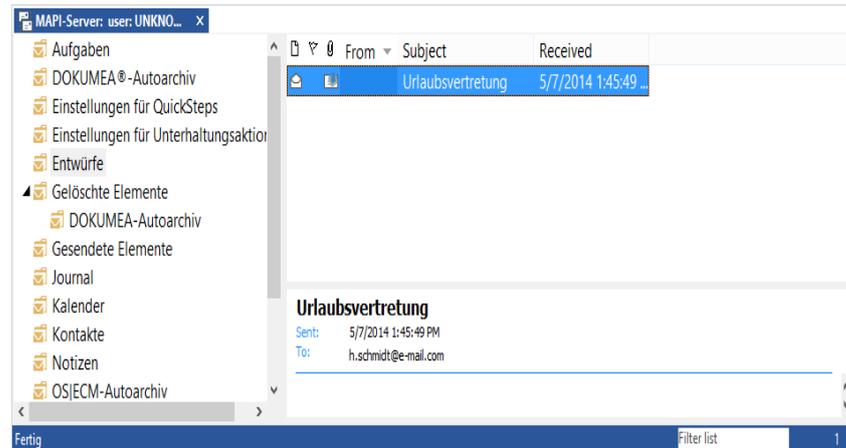
E-mails may be transferred from the inbox to a folder or register in your object search.

To do so, your network must have a compliant e-mail system installed, the administrator must have set up the document type 'e-mail' for a cabinet, and a valid license for e-mail administration must be available at your workstation.

Follow these steps to manage e-mails in enaio®:

1. Perform a query to open a folder window (see 'Folder Queries').
2. Open the Inbox directory.
3. Open an inbox directory by double-clicking.

The Inbox will open with all received e-mail messages.



4. Drag and drop one or several selected e-mail messages from the Inbox into the folder window.
- Ⓜ The e-mail messages will be copied into the folder, and the folder window display will be updated.

E-mail messages may contain references to objects which, after transferring, are not longer accessible.

You can do the following with selected e-mail messages in the **Inbox** window:

-  Save as – the e-mail will be saved as text file, MIME data, or EML data.
-  Reply – reply to the sender.
-  Reply to all – reply to all senders and recipients.
-  Forward – the e-mail is forwarded.
-  File as document – the e-mail is placed in an opened folder or a default folder.
-  Open – the e-mail will be shown in the window.
-  Delete – the e-mail will be removed from the inbox directory.
-  Update – the content of the inbox will be updated.

### Microsoft Outlook Add-In

For Microsoft Outlook an add-in is available which allows you to use buttons in Microsoft Outlook to insert e-mails directly at selected locations in enaio®.

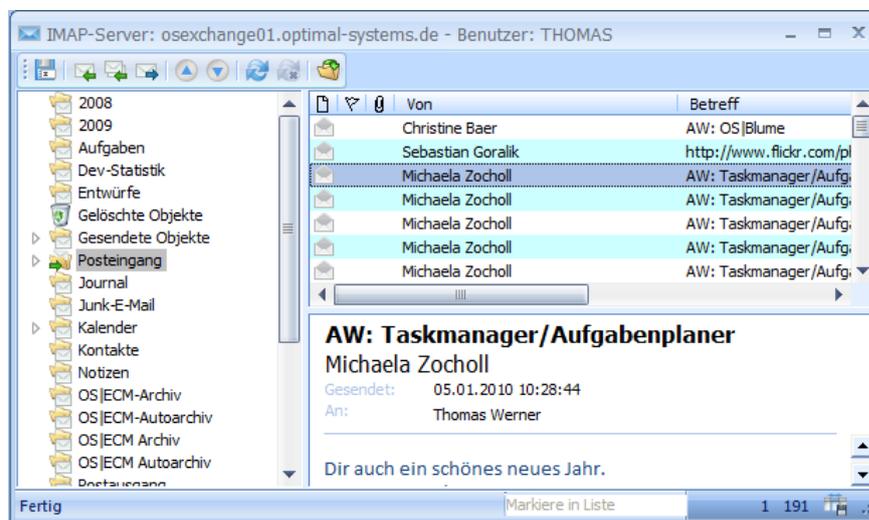
It is possible to drag and drop e-mails from Microsoft Outlook onto an open folder or the filing tray. The administrator specifies whether no e-mail, one e-mail, or several e-mails can be filed by dragging and dropping them and whether they are automatically indexed.

By using the setting **Send e-mail via Outlook** (see 'More' Area) you can create a new e-mail directly from a folder and transfer it to the folder. If you select **New > E-mail** in an opened folder, an e-mail is created in Microsoft Outlook. After sending the e-mail, it will be filed to the folder automatically. In Microsoft Outlook the category **enaio® archived** is assigned to the e-mail.

If, while starting enaio® client, you press and hold the **F9** key until **Ready** is shown in the status bar, enaio® client will not try to open the inboxes. In the tab **View > Settings > More** (see 'More' Area'), you can turn e-mail access on and off.

## IMAP

If an IMAP system is integrated instead of a MAPI system, open a mail window using the **Inbox** item on the **VIEW** tab, which you can use to open the inboxes.



From the mail window, you can also drag e-mail messages into a folder window.

You have to log in to an IMAP server (see Inbox').

E-mails from a MAPI system are saved and exported in MIME format.  
E-mails from an IMAP system are saved in IMA format and exported in EML format.

# Object Queries

## Object search

You may search for all data that have been filed, i.e. folders, registers, and documents.

### Default search

The default search for this is a search for object-type-specific index data forms and a full-text search.

If users and user groups should only be able to search using saved queries, the default search can be switched off for the users and user groups concerned using the 'Run default search' system role by the administrator. Then all object types are hidden in the **Object search** area and all corresponding functions are hidden on the **START** tab in enaio® client.

Alternatively, you can start queries using the basic parameters. Basic parameters are managed automatically.

### Searching using Basic Parameters

The **basic parameters** of an archive object are divided into the categories **Creator**, **Modifier**, and **Owner**, providing information on the person who created the archive object, the time of creation, the person who last modified the archive object, and who owns the archive object. The **Owner** is either the creator or the user to whom owner rights were assigned through the properties.

These data can be found on the **Basic parameters** tab for the index data. The basic parameters contain further properties for documents.

A search against basic parameters can make sense if the only thing you can remember about an object is the date of its creation or its creator, or if you want to check or analyze all documents of a given period.

## Search Forms

The query form contains the same fields, field properties, and catalog buttons as the index data form. Required fields and key fields are marked, but need not be filled in for a search. The requirements and limitations for entries of the index data form fields are also valid here (see 'Index Data Forms').

### Input options

Checkboxes on the search form allow an  indeterminate state. In this case, they will not be evaluated.

When designing the search form, the administrator can also configure whether the search form entries are case sensitive.

If you leave the query form fields blank, all archive objects of the same type will be displayed.

If you enter the specific value '#NULL#' into a text box, those folders, registers, and documents will be added to the hit list that have not been indexed in this field. With the operator '<>' you can invert the value. If you enter '<>#NULL#' in a text box, only those objects will be found for which this field is not empty, i.e. which contain data.

### Wildcards

You can also enter **placeholders** into the fields of the search form.

The placeholder '?' represents one arbitrary character, the placeholder '\*' represents any number of arbitrary characters. For example if you search a customer and enter 'S\*' into the search box, you will receive a list of all customers whose names start with 'S'.

In enaio® client, an invisible '\*' (**asterisk**) placeholder is by default entered at the end of each text box in the search forms. Thus, in the example above the entry 'S' would be sufficient. This setting can be changed (see "Auto' Area'). You can additionally set the client to have an invisible '\*' asterisk placed before each entry. But queries with a prepended asterisk '\*' are very time-consuming.

Catalogs with multi select must not have a '\*' placeholder at the end of the text boxes in order to deliver the required results. Manual appending of the '\*' placeholder will lead to unexpected search results.

### Search by parts of terms

You can also enable the option Search for **parts of terms** (see "Auto' Area'). If you enter several terms into a field, enaio® client will find objects indexed with all terms regardless of their order. If you want to search for terms separated by spaces in the entered order in this search mode, you have to put the terms into quotation marks. This mode is also time-consuming.

A search request may look as follows: "Eric Peterson" theory

This search will present hits containing 'Eric Peterson' and 'theory' but will not include hits in which the term 'Peterson' does not follow on the term 'Eric'.

If you search for a term sequence with contained question marks, you must put the backslash '\' as a masking character in front of the question marks. You will get a notice if a field contains an odd number of not masked question marks.

Fields can be preset automatically with entries of catalogs, add-ons, scripts or additional components. If these entries contain question marks, you also must mask them with the prepended backslash '\' for searching.

### List catalogs and logical combination

List catalogs may contain entries that can be used only for queries but not for data capture.

The **Or** and **And** buttons at the bottom of the list indicate whether multiple entries can be selected from a list catalog. Using these buttons, you can define how multiple values will be logically combined for the query. Activate OR and the hit list will contain all objects indexed with at least one of the entries, but activate AND and the hit list will show all objects indexed with all selected entries. When performing queries, the placeholder asterisk '\*' is put before and behind every entry, independently of the settings for this placeholder.

If you enter characters into the field, a list will automatically open only displaying the list entries that start with the entered characters.

### Date and time fields

If you only enter the date into a **date/time field**, 00:00:00 will be added as the time. If you do not enter minutes or seconds, 00 is added in each case. If you only enter hours, minutes, or seconds with one digit, a 0 will be added as the first digit. If you do not enter the year, the current year will be added. If you only enter a day, the current month and year will be automatically added.

If you only enter the hours and minutes in a **time field**, seconds will be automatically added with the value 00. If you only enter hours, minutes, or seconds with one digit, a 0 will be added as the first digit.

### Extended date field functions

Date fields in a search form have an extra feature. Enter the date in short form only, i.e. month (MM) and the year (YYYY), separated by a point, to show all folders, registers, and documents from that month and year in the hit list, e.g. 01.2012 for January 2012. If you only enter a four-digit number, it will be read as year. Four-digit numbers smaller than 1901 will be interpreted as invalid.

If the administrator enabled local date entry in enaio® enterprise-manager, dates will be entered in a format according to regional Windows settings.

The <, >, != and = **operators** can be used to further narrow down searches.

Examples for searching using a creation date:

- § >01.01.2015 to search for objects created after the specified date
- § <31.01.2015 to search for objects created before the specified date
- § >=01.01.2015 to search for objects created on or after the specified date
- § <=31.01.2015 to search for objects created on or before the specified date

It is also possible to search with operators for short forms of a date, e.g. <06.2015.

Smaller/larger operators can also be linked with periods: day (d), week (w), month (m), and year (y).

### Examples:

- § <-2Y to search for objects created at least two years ago, date before today's date minus two years
- § <-4d to search for objects created during the last four days, date after today's date minus four days

### Interpolation search

In date, date/time, time and number fields, an interpolation search is available. Enter two values separated with a hyphen and the search will retrieve objects indexed with one of these values or with a value in between.

### Table fields

When searching in **table fields**, the query will only search in the column in which you enter the query expression. If you additionally enter a line number into the first column, only this line will be searched.

### Search groups

Text boxes can be combined by the administrator into a **search group**. If you insert a query expression in a text box that is part of a search group, the query will be carried out over all fields of the group. Search groups are not marked in the query form.

### Combined queries

You may **combine** queries for folders, registers, documents, and basic parameters.

This is an example of a combined query: You are searching in documents of type Invoice. Restrict the folder query to clients with a Berlin address. Use the basic parameters of the document type to narrow down the search to invoices which were issued before 23 October 2002. As a result you will be shown a hit list with invoices which were issued before 23 October 2002 and posted to customers from Berlin.

### Expert mode

If a query produces too many results, you may narrow it using the **expert mode**. In the expert mode you can use logical operators to combine search terms.

### Full text index

The contents and the index data of archive objects may be converted into a **full text index**. Its query form will then have an extra field allowing you to search for terms that appear in the document content or in the index data of the archive objects. This query can be combined with the index data query.

The filing tray will not be included in a query.

When you start a query, a window displaying the created hit list will open. The hit list window displays all folders, registers, or documents fulfilling the criteria you have entered in the first, second, and all following fields. The **query behavior** determines the display level of the hit list.

### Hit list settings

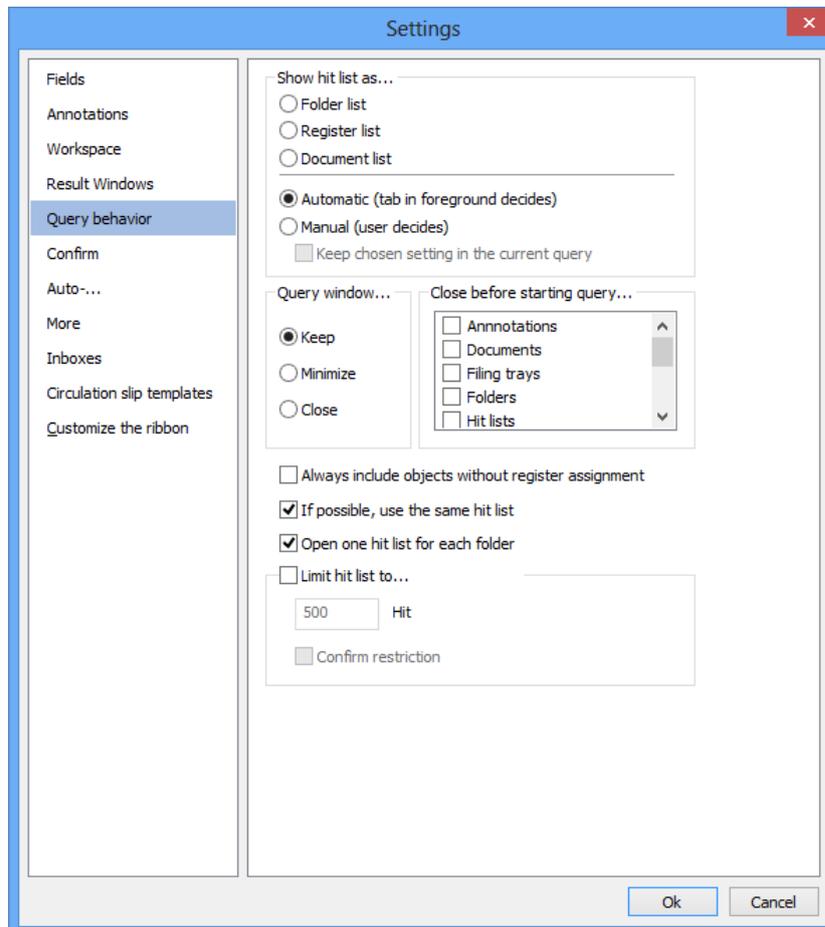
There are extensive hit list **settings**. Hit lists can be printed.

You can filter hit lists. Enter a string of at least three characters into the corresponding field on the status bar. Only the hits that contain this string are then automatically shown.

Hit lists for full-text queries contain an area with facets – dynamic filters that can be used to restrict the hit lists based on properties in the basic parameters.

## Query behavior

The settings for application behavior for queries are made via the 'Query behavior' area. To do so, open the **Settings** window with the **Settings** item on the **ENAIO** tab.



### Show hit list as...

For a hit list, you select whether it should be shown as a folder list, register list, or document list. After selecting, for example, the option **register list**, a query for documents will not show the documents but the registers containing the documents. A query for folders will show the registers contained in the matching folders if **register list** is selected.

You can also specify whether the query automatically applies to the topmost tab or whether a tab should be manually selected for the query.

### Query window...

You can specify whether the Query window will remain open, be minimized or closed after completing a query.

### Close before starting query...

To start the query, select the register or window types to be automatically closed when you start a query.

### More settings

You can also specify whether to record **objects without register assignment** in the hit list of a query for register and document data, i.e. documents not located in a register.

With the option **Use the same hit list if possible** you specify that for a new query, a hit list still open from an earlier query will be updated. If this option is not selected, then a new hit list will be opened for a new query. This behavior can be individually set on every search form using the  /  **Reuse hit list** buttons.

The setting **Open one hit list for each folder** specifies that, when a folder is opened, it is checked whether the folder is already open and, if it is, it is brought to the foreground instead of being opened again.

You can also restrict the hit list to a certain number of hits and specify whether you want to be informed if a hit list exceeds the set number of hits.

The maximum number of hits in hit lists that is specified by the administrator always applies.

### Query of Versions

A search is done against the current version of the objects' index data. If enaio® is configured in such a way that changed index data versions are saved, the search can be extended to all versions. To do so, press **SHIFT** while starting the query. You will receive a respective notification. If you want to reactivate this notification, you can do so in your settings (see "Confirmation" Area).

Hits which refer to old versions are in bold.

### Settings for the Hit List

The hit list will be displayed as a table. The hit list will be displayed as a table. Folders, registers, and documents will be listed line by line. sorting

#### Columns

A folder or register hit list for a search for 'sales partner' has the following columns:

  Object Company name

Type icon | Link/Note | Object | Index data

A document hit list for a search for documents in the 'Sales Partner' folder has the following columns:

   Object Column 1

Type icon | Archiving status | Access status | Link/Note | Signature status | Object | Index data

The column icons flag objects in the hit list as follows:

<b>Type</b>	Folders, registers, or documents
<b>Archiving status</b>	Indicates whether a document still needs to be stored in an audit-proof manner or if this was already done.
<b>Access status</b>	Indicates whether the document is editable
<b>Link/note</b>	A link or note is assigned to the object

In the **Object** column, you can find the name of the folder, register, or document type.

Other columns show the **index data**. You can individually configure the index data to be displayed as hit list columns, for each object type. For documents, you may select both fields from the basic parameters and from the folder index data as columns; for folders and registers, you can select fields from the basic parameters (see 'Fields' Area').

Data from table fields and multiple fields cannot be displayed.

Fields of the object type can also be selected in the **Show hit list fields** dialog. The dialog can be opened by use of the context menu of an object in the archive area.

#### Hit count

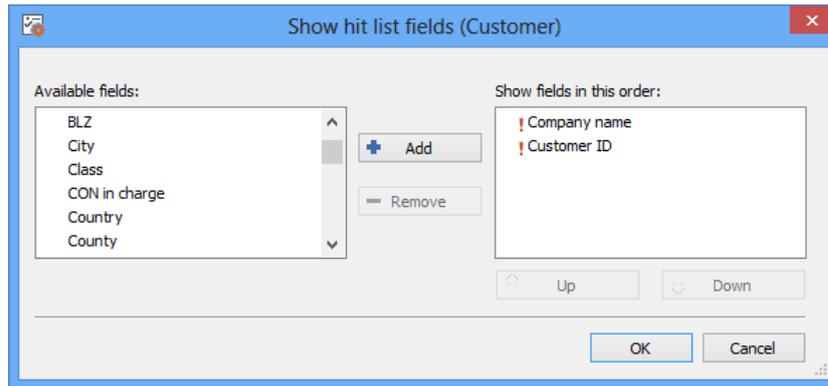
The number of hits in a hit list can be limited by the administrator. If the hit list does consequently not show all hits, you will get a notice in the status bar of the hit list.

All users can individually specify the number of hits in the settings (see 'Query Behavior' Area'), however, the maximum is always the number of hits specified by the administrator.

#### Column view

For a clearer overview of results, you can also set contrasting background colors for the rows in the hit list (see 'Results Window' Area').

Columns can be selected. The setting affects all hit lists and folder windows.



The **text alignment** of columns can be set using a hit list. To do so, right-click on the column header and from the context menu **Alignment** > select the desired text direction: left-justified, centered, or right-justified.

You can change the column widths with the mouse.

### Column list sorting

When clicking on a column, the column will be highlighted and the listed entries will be sorted in alphabetic order. When clicking again, the entry order will be reversed.

If you don't define a sorting, hit list objects are sorted in the following order: folders, registers, documents. Folders and registers are listed alphabetically. If the hit list contains multiple folders or registers with identical names, they will be sorted by the folder or register ID in ascending order. Documents are sorted by the modules with which they were created (see 'Modules') in the following order:

- § Grayscale images
- § Black-and-white images
- § Color images
- § Windows Documents
- § Movie documents
- § E-mail documents
- § XML documents
- § Container documents

If several documents in the hit list were created with the same module, they are sorted by object type, and if multiple documents of the same object type exist, they are sorted by document ID in ascending order.

### Font size

The **font size** in hit lists can be increased/decreased with **CTRL+mouse wheel**. Alternatively, you can also change the font size through a context menu in the column header of a hit list. The font-size setting is user-specific and is saved even after enaio® client is restarted.

If you select **Save column width** from the context menu of the table header line, the grouping settings and font size will also be saved.

### Searching in the hit list

Use the keyboard shortcut **CTRL+F** to search in hit lists. If you use the shortcut, you can instantly enter the search term in the **Filter list** field at the bottom of a hit list. The hit list is restricted. The search term or cells with the term searched for are highlighted in color (see 'Results Window' Area').

### Report view and quicklook view

Rather than being shown as a table in the report view, the document hit list can be shown in the quicklook view. Quicklooks are small previews (thumbnails) of the first page of a document. They are only available for image documents and documents created with Microsoft Office applications. During the setup of document types, the administrator can decide whether quicklooks are created or not.

Switch between the report and quicklook views by clicking the appropriate button on the status bar.

## Grouping Hit Lists

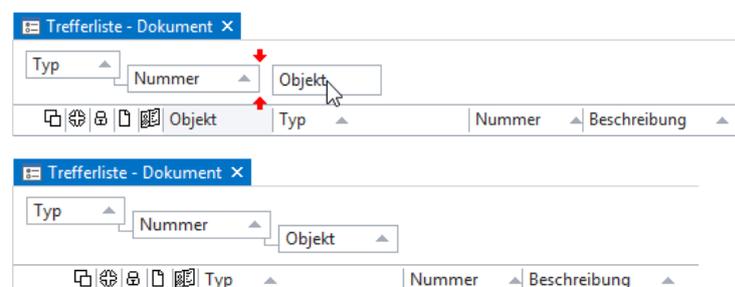
You can display hits in a clearer way by grouping hit lists.

Right-click the column header of the column by which you want to sort the hits and select the **Group** item from the context menu. The hits will be grouped according to the column's entries.

You can group hit lists multiple times in the same way.

### Grouping pane

From the context menu of the column header you can show the **grouping pane** via the hit list. The grouping area visualizes the column grouping in a hierarchical display. You can drag columns for grouping into the grouping area. In the grouping area, you can modify the sequence of grouping by dragging the column headers to a new position.



## Grouping sections

The header of each grouped section contains the number of elements of this group, either the number of objects or the number of groups if you have grouped the hit list multiple times. You can open and close the groupings using the arrow icons in the headers or the +/- buttons on the numeric pad of your keyboard. For a clearer overview, you can also set contrasting background colors for the rows in the hit list (see 'Results Window' Area').

Object	Company name	Customer ID	Country	County
<b>(Elements: 2)</b>				
<b>(Elements: 5)</b>				
<b>Berlin (Elements: 1)</b>				
<b>A (Elements: 2)</b>				
<b>D (Elements: 6)</b>				
<b>(Elements: 1)</b>				
<b>Baden-Württemberg (Elements: 1)</b>				
<b>Bayern (Elements: 1)</b>				
<b>Berlin (Elements: 8)</b>				
Customer	Krüger	674	D	Berlin
Customer	Ester	897	D	Berlin
Customer	Brude	908	D	Berlin
Customer	Geltner	911	D	Berlin
Customer	Mainz	923	D	Berlin
Customer	Krüger	674	D	Berlin
Customer	Baumert	912	D	Berlin
Customer	Werner	2694	D	Berlin
<b>Brandenburg (Elements: 4)</b>				
<b>Hamburg (Elements: 3)</b>				
<b>IL (Elements: 1)</b>				
<b>UK (Elements: 1)</b>				
<b>US (Elements: 2)</b>				

You can disable groupings for single or multiple column headers in the context menu.

## Save settings

If you use the **Save column width** feature to save the hit list settings, the grouping settings will be saved as well.

If you use the **Save column width** feature when a hit list is shown with a link area, the settings for the hit list area and the link area are saved separately from the context menu of the corresponding title bars.

## Folder Queries

Folder searches are carried out against the type-specific folder index data and the folder's basic parameters.

Search for folders if you want to list folders first and search in more detail later.

You will also search for folders if you search for entries in the index data. In a 'Customer' folder, for example, you search for all customers at a specific location.

Folder hit lists can be sorted as usual. You can also set which fields of the index data will be shown as list columns.

Before starting the query, from the context menu you can calculate the number of hits to find out if your search criteria are suitable to produce a manageable hit list.

## Searching For Folders

1.  Open the object search.
  2.  Double-click the folder icon for the intended folder type.  
The query form will open.
  3. Fill out the query form.
  4. Click the **Start query** button or press ENTER.
- Ⓜ The result window with the folder hit list will open.

## Hit list in the folder window

In the settings (see 'Fields' Area'), you can specify that not only a single folder hit list is opened but a folder window as described below. The folder window is in the left navigation pane and contains a list of all found folders. This setting may be appropriate if you are hoping to retrieve only a few hits. Unlike the ordinary folder hit list, the hit list in the navigation pane cannot be sorted.

## Full text search via folders

The query form can contain a full text section. Therein, you can enter words to be searched for in the full text index. The full text index contains all terms from the index data of folders. You can logically combine terms and use placeholders (see 'Full Text Searches – Combinations and Placeholders').

To open the description, click on the **Help** button in the **Full text** area. 

## Query screen

The following functions can be found on the **INDEX DATA** ribbon tab and in the context menu of the search form:

### **Add**

Search forms can be combined (see 'Combined Queries').

### **Remove**

After combining query forms, you can remove the query form of the foremost tab.

### **Run**

Executing query...

### **Calculate number**

The numbers of hits which match your query criteria are calculated.

### **Save**

Stores the search form or the combined search forms as a query (see 'Saved Queries').

### **Subscribe**

Subscribes to a query (see 'Subscribing to Queries').

#### **Reset page**

All entries in the fields of the foremost tab on the current query form will be deleted.

#### **Reset query**

If you have combined search forms, you can delete all entries for all search forms.

#### **Expert mode**

Open the search form in expert mode. In expert mode, logical conditions can be used to query the index data of fields (see 'Queries in Expert Mode').

#### **Variables**

You save a query as 'Query with Variables' (see 'Saving Queries with Variables').

If you choose the option **Register list as Query behavior** (see 'Query Behavior Area'), your results will comprise a list of the registers located in the queried folders. If you select **Document list**, you will get a list of the documents located in the queried folders.

## Folder Hit List

The folder hit list will open in the result window.

Separators can be hidden/shown in the 'Results Window' Area of the settings dialog. The number of selected hits and the total number of hits are displayed in the status bar. In the right area is a button for saving the position of the window in the dialog view.

Retrieved folders will be listed. The columns can be selected from among the index data fields and the basic parameters (see 'Fields' Area). You can sort the list over the list columns. You can change the column width with the mouse (see 'Settings for the Hit List').

### Hit list

The **HITS** ribbon tab of a folder hit list contains the following functions:

Open



#### **Locations**

The following functions are available to you for the location:

- § Open location (inactive for folders)
- § Determine folder (inactive for folders and registers)
- § Determine register (inactive for folders and registers)
- § Locations and References

In an overview, the location functions show all location relationships for a selected object. These include locations,

	<b>Index data</b>	<p>references, links, and notes.</p> <p>Opens the data sheet of the selected object for viewing () or for editing (). The folder tab contains the index data. The basic parameters are opened using the  button in the footer of the data sheet.</p> <p>The folder index data can be edited (see 'Editing the Index Data of Folders').</p> <p>Data sheet data can now be copied to the clipboard and pasted into a search form, where it can be directly run or saved as a search query.</p>
	<b>Open</b>	<p>Opens a selected folder in the folder window (see 'Folder Window').</p>
	<b>More &gt; Links</b>	<p>Opens the link window of the selected folder. Links are listed there.</p> <p>If notes or links to a folder already exist, the folder will be marked with the link icon  in the hit list.</p>
	<b>More &gt; History</b>	<p>Opens the history of the selected folder (see 'History of Folders').</p>
	<b>More &gt; Properties</b>	<p>Opens the properties of the selected folder with the data of the basic parameters and information that is useful for administrative tasks (see 'Folder Properties').</p>
<b>Edit</b>		
	<b>Delete</b>	<p>Delete a selected folder. A confirmation dialog will appear (see 'Confirmation' Area').</p>
	<b>Create copy</b>	<p>Create a new, empty folder. The index data form opens. The original folder data will be already entered.</p>
	<b>Free text</b>	<p>You can open an editor and edit the link note.</p>
	<b>Archiving</b>	<p>Changes the archiving status of the selected folder:</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> The document is approved for archiving and will be archived on an audit-proof basis during the next archiving run.</li> <li><input type="checkbox"/> The document is not approved for archiving and will not be archived on an audit-proof basis during the next archiving run.</li> </ul>

	Sends the selected folder to the Favorites portfolio (see Favorites').
<b>Favorites</b>	Users see these favorites in their favorites on a mobile device in enaio® apps and in enaio® sync.
<b>Actions</b>	
	Sends a reference to the selected folder or the content of the folder.
<b>E-mail</b>	
	Transfers the selected folder to an external application.
<b>Application</b>	
	Allows you to decide whether a reference or the preview URL for the selected folder is copied to the clipboard.
<b>Clipboard</b>	
<b>List</b>	
	Updates the hit list after changes have been made.
<b>Update</b>	
	Stops the query. The folders which have already been found are shown in the hit list.
<b>Cancel</b>	
<b>Export</b>	
	Exports the folder index data (see 'Exporting Index Data').
<b>Export</b>	
	You can print the hit list.
<b>Print</b>	
<b>Collaboration</b>	
	Starts a workflow with the selected folder.
<b>Start workflow</b>	
	Opens the <b>Follow-up</b> window. There, you can enter the data associated with a follow-up (see 'Follow-Up').
<b>Follow up</b>	
	Subscribes to folders (see 'Subscribing to Objects').
<b>Subscribe</b>	
<b>Browse</b>	
	Open the full text search and search against all objects in the folder.
<b>Full text</b>	
	Executes a full text search based on the index data and the

**Find similar objects** content of the selected folder.



**Free text**

Starts a query of all notes and links connecting objects which are shown in the contents area. After the search, the contents area will show only the objects with notes and links that contain the query expression.



**Cancel search**

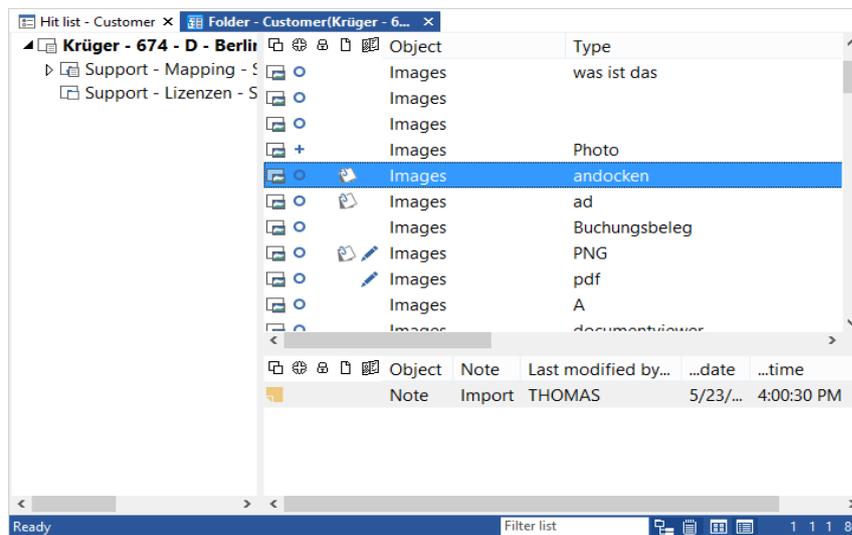
Stops a query of notes or links so that all objects are again shown in the contents area.

The optimized context menu only contains the most frequently used functions. If you do not use optimized menus, more functions from the ribbon tab will be shown in the context menu (see 'Workspace' area').

## Folder Window

If you open a folder or register from the hit list with the **Open** button or by double-clicking, the folder window will open as the location. In the settings, choose if you want to show or hide the the status bar, and the separators.

The folder window is separated into three areas: the navigation pane on the left, the contents area at the top right, and the optional link area at the bottom right. The width of the areas can be adjusted by dragging with the mouse.



## Navigation Area

The **navigation area** contains the register tree. If you select a register or a folder within the tree, the folder name will be set in bold and the content will be shown in the contents area on the right.

Folders and registers can be identified in the navigation area through the index data selected in the settings (see 'Fields' Area'). These settings additionally allow you to define whether or not to alphabetically sort the order of registers and whether or not to display the number of objects contained in a register in front of each register.

The number of objects displayed does not take into account whether you have access to all objects. That is why the hit list may contain fewer objects than shown here.

## Contents Area

The **Contents area** lists the content of the selected register or folder. You can have the contents displayed in the report or quicklook view. Switch between the two views with a click on the appropriate buttons on the status bar of the result window.

To hide the contents area, select **Options >** from the context menu of the folder icon in the object search. Uncheck the checkbox for the option **Show register tree**. Further options enable you to alphabetically sort the registers within a level of the navigation area.

## Filter

You can filter the content in the right pane. With individually set view filters, only the folder content conforming to the filter criteria is shown (see 'View Filter').

## Views

The different view options can be found in the status bar of the folder window.

 In the quicklook view, you will see a preview of the first page of image documents and W-documents which are created with a Microsoft Office application. A default icon will be displayed for folders, registers and other documents.

 In the report view you see the folder content as a list. The list columns are shown as in a hit list (see 'Document Hit List').

You can group the content of a folder (see 'Grouping Hit Lists').

## Display as register tree

 All folder documents will be shown regardless of the register locations. The navigation pane will be hidden.

Using the context menu of the folder type in the object search, using the **Options >** item you can also specify whether the folder hit list is shown as a register tree.

With the context menu of the objects in the left navigation area, you can open them in a new window.

## Link area

The **link area** shows the links of a selected register or document. If several objects are selected, the links of the top-most object are shown. You can drag objects into the link area to create links.

 You show or hide the link area.

## Location view

On the **FOLDER** ribbon tab of a folder hit list in the register tree view you will find the following functions:

Open



### Locations

The following functions are available to you for the location:

§ Open location (inactive)

§ Determine folder

§ Determine register

§ Locations and References

In an overview, the location functions show all location relationships for a selected object. These include locations, references, links, and notes.



### Edit index data

Opens the data sheet of the selected object as read-only () or for editing (). The tabs contain the index data. The basic parameters are opened using the  button in the footer of the data sheet.

The index data can be edited.

Data sheet data can now be copied to the clipboard and pasted into a search form, where it can be directly run or saved as a search query.



### Open

Opens a selected object.



### Variants

Opens the variant administration of a W-document.



### History

Opens the history of the selected object (see 'History of Folders').



### Properties

Opens the properties of the selected object with the data of the basic parameters and information that is useful for administrative tasks.



### Links

Opens the link area of the selected object. Links are listed there. If notes or links to an object already exist, the object will be marked with the link icon  in the hit list.



### Image

Use the image comparison function to put two image documents next to each other in a window (see 'Comparing Image Documents'). For the image comparison an additional magnifier

**comparison** is available. The images can be tiled. Thereby differences are highlighted in color.



Opens the electronic signature of signed PDF documents.

### PDF signatures

#### New



#### Object

The menu with configured document types will open. The folder, register or document type you have selected last will be bold.



#### Scan

Opens the batch scan dialog (see 'Batch Scan').

#### Edit



#### Check in

Checks in a checked out document.



#### Discard changes

Revokes the check-out of a document. The processing status from before it was checked out is restored.



#### Delete

Deletes a selected object. A confirmation dialog will appear (see 'Confirmation' Area').



#### Create copy

Creates a new, empty object (see 'Copying Documents'). The index data form opens. The data from the original object are automatically inserted.



#### Free text

You can open an editor and edit the link note.



#### Separate pages

Opens a selected image document in batch-scan mode (see 'Batch Scan'). As in batch-scan mode, you can add or separate images here too.



#### Archiving

Changes the archiving status of the selected folder:

The document is approved for archiving and will be archived on an audit-proof basis during the next archiving run.

The document is not approved for archiving and will not be archived on an audit-proof basis during the next archiving run.



#### Signature

Opens the selected document in signature mode.



#### Favorites

Sends the selected object to the Favorites portfolio (see 'Favorites').

Users see these favorites in their favorites on a mobile device in

enaio® apps and in enaio® sync.

#### Actions



#### E-mail

Sends a reference to the selected object or the content of the object.



#### Application

Transfers the selected object to an external application.



#### Clipboard

Allows you to select whether a reference or the preview URL for the selected object is copied to the clipboard.

#### Location



Selects a view filter.



Creates a view filter (see 'View Filter').



#### Update

Updates the hit list after changes have been made.



#### Cancel

Stops the query. The folders which have already been found are shown in the hit list.



#### Up

Navigates up one level.

#### Export



#### Export

Select whether the index data () or the pages of the selected document () are exported (see 'Exporting Index Data'). If the pages are exported, these are saved in their file format at the location you specify.



#### Print

You can print the hit list.

#### Collaboration



#### Start workflow

Starts a workflow with the selected object.



#### Follow up

Opens the **Follow-up** window. There, you can enter the data associated with a follow-up (see 'Follow-Up').



#### Subscribe

You can subscribe to objects (see 'Subscribing to Objects').

#### Browse



### Full text in folder...

Open the full text search and search against all objects in the folder.



### Find similar objects

Executes a full text search based on the index data and the content of the selected object.



### Free text

Starts a query of all notes and links connecting objects which are shown in the contents area. After the search, the contents area will show only the objects with notes and links that contain the query expression.



### Cancel search

Stops a query of notes or links so that all objects are again shown in the contents area.

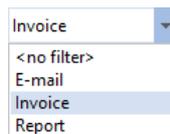
The optimized context menu only contains the most frequently used functions. If you do not use optimized menus, more functions from the ribbon tab will be shown in the context menu (see 'Workspace' area').

## View Filter

The contents area of the folder windows can be organized more effectively by applying view filters which apply for the entire cabinet. Set up view filters by clicking the **Filter** button. Select a filter from the list. The filter can be set as default filter and used every time a folder window is opened.

### Select view filters

Select a view filter from the list of view filters on the ribbon tab **Folder**.

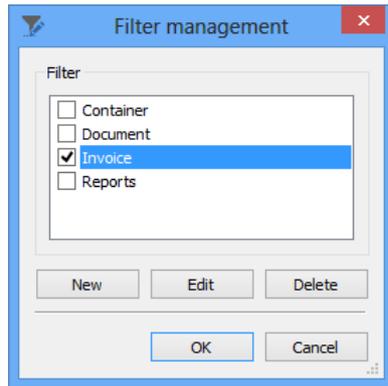


A selected view filter is only applied to the active folder window. The next time the folder is opened, the default filter will be applied if you have enabled a default filter in the **Filter management** window.

## Set Up View Filter



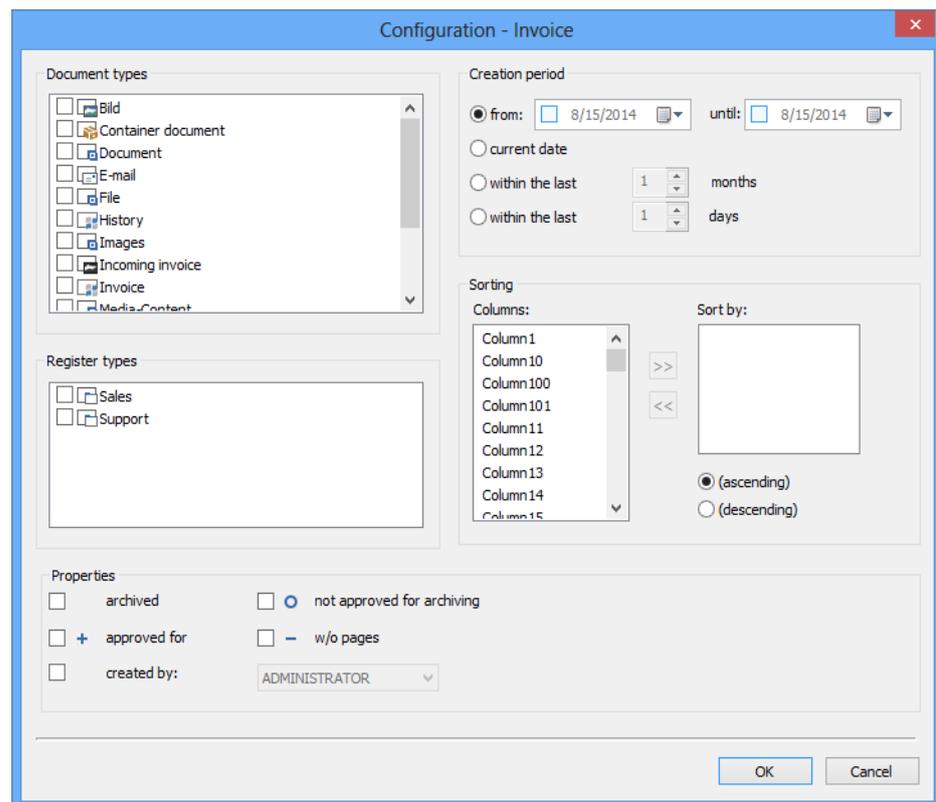
Open the **Filter management** window with the **Filter** button on the **FOLDER** ribbon tab.



View filters which have already been set up for this cabinet are listed.

Follow these steps to create a new view filter:

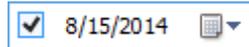
1. Click on the **New** button.  
A new view filter will be added.
2. Enter a name for the view filter into the selected field. Filter names have to start with a letter or number.
3. Click the **Edit** button.  
The Configuration window will open.



In the **Document types** area select the document types which will be shown in the contents area.

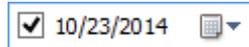
In the **Creation period** area, you can enter a time period for the document type:

§from



Open the calendar and select a date. The entry with the selected date has to be activated to affect the result. Archive documents created before this date will not be displayed.

#### §until



Specify the end of the search period in the same way. Archive documents created after this date will not be displayed.

If an inactive filter is displayed it will not affect the search period.

#### §current date

Select this option to display archive documents which have been created on the present day.

#### §Within the last months

Select this option and enter the value n if you only want to display archive documents which have been created within the last n months.

#### §Within the last days

Select this option and enter the value n if you only want to display archive documents which have been created within the last n days.

In the **Properties** area you can set the archiving properties.

All entries are linked with the logical AND.

You can also filter archive documents by the created by user property.

In the **Sorting** area you can choose the index data fields to be used as columns in the folder window. Using the arrow buttons, the columns can be moved to the **Sorting** area in the intended order. Archive objects can be sorted in alphabetical order ascending or descending.

In the **Register types** section you can mark the register types to be shown. All registers of these types will be displayed.

The filter criteria will also be applied to the content of registers if you have enabled the relevant option.

In the navigation pane, all register types are always displayed.

#### 4. Confirm your entries with **OK**.

The new filter will be displayed in the Filter management window in the list of available filters.

### Filter management

You can **Edit** and **Delete** saved filters in the **Filter management** window.

To rename a filter click on its name, then click again to make the field editable. Click again to make the field editable.

### Default filter

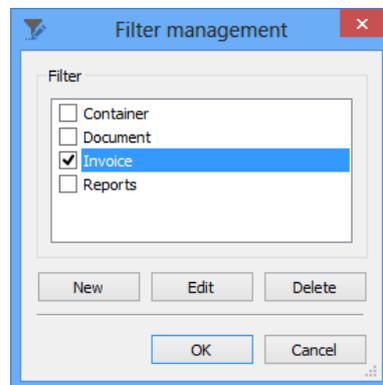
If you enable a filter in **Filter management** it will automatically be applied as a default filter every time a folder window is opened. When the folder window is opened, initially only documents are shown which match the filter criteria of the default filter. Another view filter can subsequently be set manually. If no default filter is active in filter management, the filter manually set in the folder window will be applied again when the window is next opened.

### Enable view filter as default filter

For every cabinet you can flag a set-up view filter as default filter . The default filter will be applied to the contents area every time the folder window is opened.



Open the **Filter management** window with the **Filter** button on the **FOLDER** ribbon tab.



The set up view filters are listed. Select the view filter that you wish to set as the default filter. It will be used every time you open a folder window. If you do not enable any filter, no filter will be used.

## Register Queries

Registers are always located in a folder. If you want to search for a register, you need to open the folder type in the archive area, where the register is contained. You cannot perform a register query across multiple cabinets.

You may search for registers if you want to list registers first, but later go deeper into the structure.

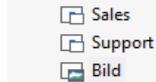
You can sort the hit list in the results window.

You can decide which fields of the data sheet will be used as columns.

### Searching For Registers

1. Open the object search.

2.  Customer Open a folder type in the object search.



3.  Double-click the register icon.  
The query form will open.
4. Fill out the query form.
5. Click the **Start query** button or press **ENTER**.

® The register hit list will open in the result window.

The query form can contain a full text section. Therein, you can enter words to be searched for in the full text index. The full text index contains all terms of the register index data. You can logically combine terms and use placeholders (see 'Full Text Searches – Combinations and Placeholders').

To open the description, click on the **Help** button in the **Full text** area. 

The **INDEX DATA** ribbon tab contains the following functions:

#### Combined search



Search forms can be combined (see 'Combined Queries').

Add



After combining query forms, you can remove the query form of the foremost tab.

Remove

#### Search



Starts query.

Execute



The numbers of hits which match your query criteria are calculated.

Calculate  
number



Stores the search form or the combined search forms as a query (see 'Saved Queries').

Save



Subscribes to a query (see 'Subscribing to Queries').

Subscribe



All entries in the fields of the foremost tab will be deleted.

Reset

#### Edit



Open the search form in expert mode. In expert mode, logical conditions can be used to query the index data of fields (see

Expert mode 'Queries in Expert Mode').



Variables

Starts the process for saving a query as a 'Query with Variables' (see 'Saving Queries with Variables').

All functions are also available in the context menu of the index data form.

If you select the option **Folder list** as **Query behavior** (see 'Query Behavior' Area), you will receive a list of folders in which the queried registers are stored. Select the option **Document list** and you will receive a list of documents located in the queried registers and documents that are not located in any register.

## Register Hit Lists

The register hit list of a tab will open in the result window. On the right of the title bar of the results window you will find the buttons: **Minimize**, **Maximize/Restore**, and **Close**. The size and position of the window can be changed with the mouse.

Separators can be hidden/shown in the 'Results Window' Area of the settings dialog. The number of selected hits and the total number of hits are displayed in the status bar. There is a button on the far right with which you can save the position of the window.

The registers returned by the search are listed. The columns can be selected from among the fields of the data sheet. The sorting of the list and the width of the columns can be changed with the mouse (see 'Settings for the Hit List').

The list can be grouped (see 'Grouping Hit Lists').

The functions on the ribbon tab **HITS** and the context menu are the same as those in the folder hit list (see 'Folder Hit List').

## Document Queries

In contrast to queries for registers or folders, queries for documents may be carried out with multiple search forms (see 'Combined Queries').

Before starting the query, you can calculate the number of hits using the context menu, to find out if your search criteria are accurate enough to result in a manageable hit list.

You can sort the hit list in the results window.

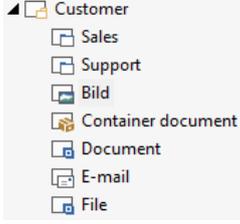
You can decide which fields of the data sheet will be used as columns.

### Folder types and document types

Documents are always located in a folder. If you want to search for a document, you need to open the folder type, in which the document is contained, in the archive area. You cannot perform a register query across multiple cabinets.

Documents always have a document type. A document query also requires the selection of a document type in the archive area.

### Searching For Documents

1.  Open the object search.
2.  Open a folder type in the object search.
3. Double-click a document type.  
The query form for the document type will open.
4. Fill out the query form.
5. Click the **Start query** button or press **ENTER**.

® The document hit list will open in the results window.

The **INDEX DATA** ribbon tab contains the following functions:

#### Combined search



Search forms can be combined (see 'Combined Queries').

Add



After combining query forms, you can remove the query form of the foremost tab.

Remove

#### Search



Starts query.

Execute



The numbers of hits which match your query criteria are calculated.

Calculate  
number



Stores the search form or the combined search forms as a query (see 'Saved Queries').

Save



Subscribes to a query (see 'Subscribing to Queries').

Subscribe



All entries in the fields of the foremost tab will be deleted.

Reset

#### Edit



Expert mode

Open the search form in expert mode. In expert mode, logical conditions can be used to query the index data of fields (see 'Queries in Expert Mode').



Variables

Starts the process for saving a query as a 'Query with Variables' (see 'Saving Queries with Variables').

If you select the option **Folder list** as **query behavior** (see "Query Behavior" Area), you will receive a folder list in which the queried documents are stored. If you select the option **Register list**, you will receive a list of registers in which the queried documents can be found.

## Full Text Document Types

The search form of document types for which full text indexing has been configured, contains an additional area for full text queries.

In the **Full text** area, you can enter the terms to be searched for in the full text index. You can logically combine terms and use placeholders (see 'Full Text Searches – Combinations and Placeholders').

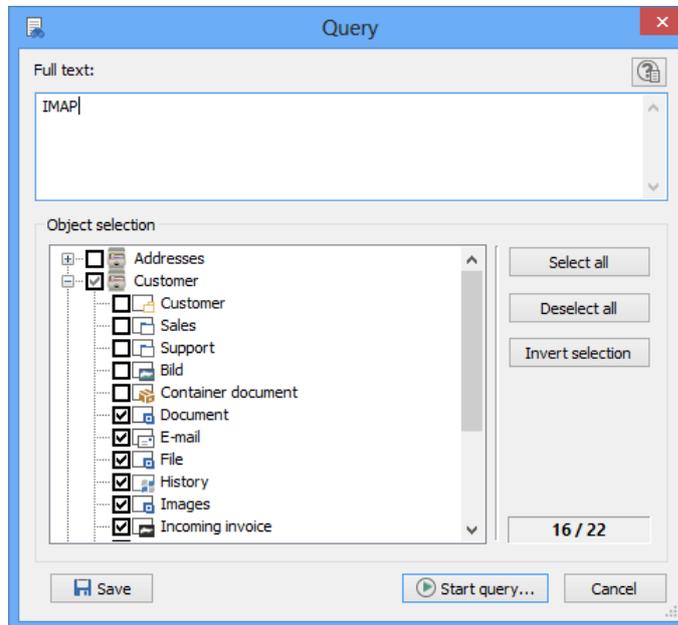
The description of how to combine search terms with placeholders can be displayed by clicking the **Help** button in the **Full text** area.

Queries using index data and queries using full text are combined with the logical **AND**.

Depending on the configuration, the full text index either contains all terms out of the documents' content or all words from the index data or both.

## Full Text Index Queries

If you want to search only against the full text index of indexed archive objects, i.e. documents, registers, and folders, you can open the full text search form via the **START** tab.



Enter terms into the **Full text** area.

In the **Object selection** area, you can select the object types you would like to search.

The hit list contains the following objects:

- § all documents, registers, and folders of the selected object type that are indexed with the search terms.
- § as well as documents of the selected document types that include the entered terms in a document file.

### Full text

Entries for a full text search, i.e. search terms and the selected objects, can be saved as a saved query with the **Save** button (see 'Saved Queries').

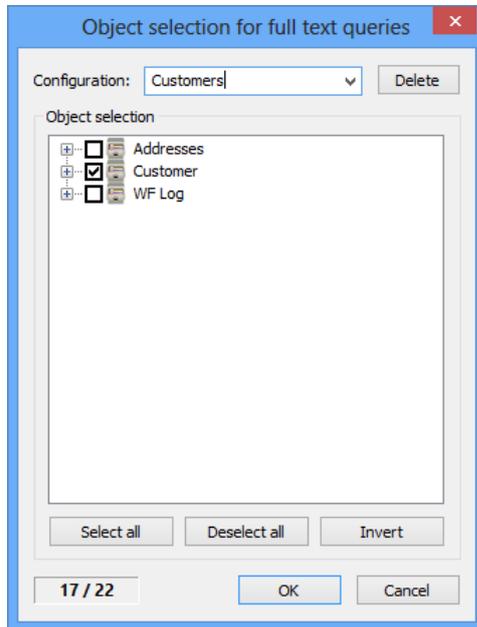
Using the navigation and ribbon, you can save the object selection for full text queries in various configurations (see 'Navigation').

A full text search against the content of folders can be started from the context menu of the respective folder in a folder hit list.

## Full Text Search Configurations

For the full text search from the navigation and from the full text box in the ribbon, you can specify object types for the search using configurations.

 The configuration dialog is opened via the configuration icon for the object selection.



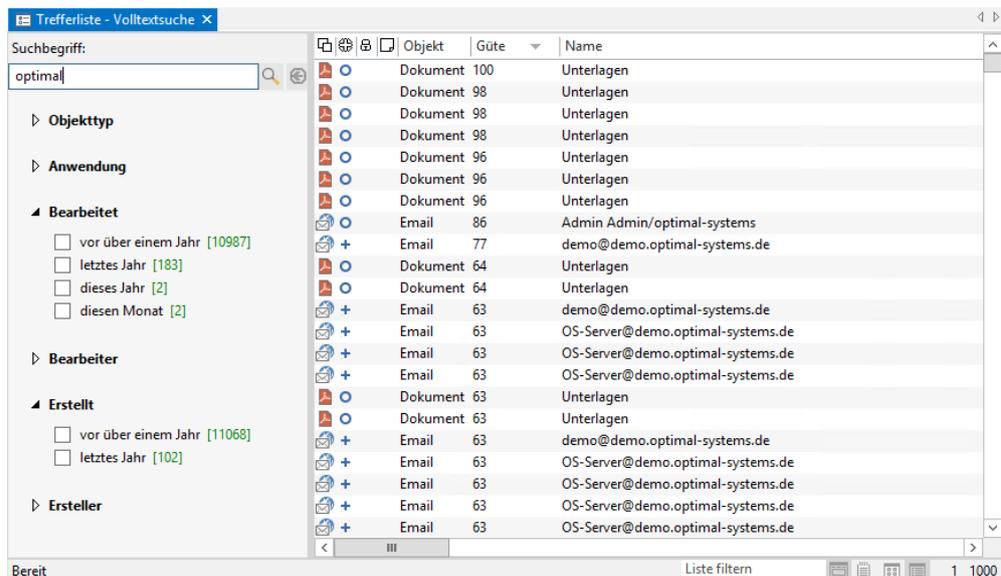
Name the configuration, select the objects to be searched, and confirm with **OK**.

The configuration is saved and can be selected for the search from the configuration list.

The configuration <List> is always available. This configuration links the full text search with each active list, for example a hit list or the content of a folder or of a portfolio.

### Full Text Hit Lists

In addition to other hit lists, full text hit lists also contain an area with facets – dynamic filters that can be used to restrict the hit lists based on properties.



In the facets area, the following basic hit properties are specified:

- § Object type
- § Application
  - Hits that are assigned to external applications
- § Edited
- § Editor
- § Created
- § Creator

For each property, the number of hits with that property is given.

You can open and close the facets using the arrow icons in the title bars of the facets or via the +/- buttons on the numeric pad of your keyboard.

Using the settings (cf. 'Facets' Area') you can switch the basic facets on and off and, for object types, also enable fields with list catalogs as additional facets.

Also indicated is the quality of the hits produced from the number of search expressions in the text relative to the overall text and from the closeness of the search expressions.

You can show a preview area for each hit from the context menu of the header of a full text hit list. An excerpt with the search term is shown there. These settings are saved with the column configuration.

### Filter and search

If you want to filter the hit list for these properties, select the relevant checkboxes. The hits will be immediately filtered. The number of hits for the properties will be updated.

You can also edit the search term in the search field and start a new search with the magnifying glass button. Use the arrow button that is then displayed to return to the last full text hit list.



The area with the dynamic filters can be hidden (see 'Auto' Area)..

## Full Text Searches – Combinations and Placeholders

The following search options are available using the full text search:

Search expression	<p>Search expressions may contain numerical and alphabetical characters, including the German umlauts.</p> <p>Search terms are not case-sensitive. Search expressions are normalized, e.g. umlauts are resolved. The system always searches for the basic form and for parts of terms.</p> <p>Example: A search for 'dreaming' also shows 'dream,' 'dreamed,' and</p>
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	<p>'dreamcatcher' as hits.</p> <p>Searching for the basic form does not however find the derived forms: 'Dream' does not find 'dreaming,' but it does find 'dreamcatcher.'</p>
Search expression and placeholders	<p>Search expressions can be combined with the following placeholders:</p> <p>'*' stands for an arbitrary number of arbitrary characters.</p> <p>'?' stands for exactly one arbitrary character.</p> <p>Placeholders can be used at the start, at the end, and within a search term, and it is also possible to combine them.</p> <p>Searching with placeholders at the start takes a lot longer.</p> <p>When issuing full text queries, the auto asterisk settings which have been predefined for enaio® client (see 'Auto' Area) will be ignored. Thus, the placeholder '*' will not be added automatically.</p>
Operators	<p><b>Search for documents which contain one of multiple search expressions:</b></p> <p>Multiple search expressions are linked with the logical OR, if they are separated by the Boolean 'OR'. There must be at least one space before and after the operator.</p> <p>If expressions are not separated by an operator, these expressions are implicitly combined using the logical OR.</p> <p>Example: order editor Maier</p> <p>Documents in which at least one of the three words is found will be shown.</p> <p><b>Search for documents that contain all search expressions:</b></p> <p>Multiple search expressions can be connected with the logical AND if they are separated either by the Boolean operator 'AND' or the characters '&amp;&amp;'. There must be at least one space before and after the operator.</p> <p>Example: order AND editor &amp;&amp; Maier</p> <p>Documents in which all three words are found will be displayed.</p> <p><b>Search for documents that do not contain the search expression:</b></p> <p>The Boolean operator 'NOT' can be placed before a search expression. In this case, documents are displayed that do not contain the expression.</p> <p>Example: editor AND NOT Maier</p> <p>Documents containing 'creator' and not 'smith' will be displayed.</p> <p><b>Search for documents that contain the exact same sequence of</b></p>

	<p><b>search expressions:</b></p> <p>It will be searched for the exact sequence of terms between quotation marks.</p> <p>Example: "Klaus Maier"</p> <p>Documents where 'peter' is exactly in front of 'smith' are displayed.</p> <p>Without quotation marks, documents would be displayed that contain 'peter' or 'smith'.</p> <p><b>Number of words between search expressions</b></p> <p>The sequence of two search terms in quotation marks can be extended by defining the maximum number of words within the sequence.</p> <p>Example: "Klaus Maier"~1</p> <p>Documents containing 'Klaus Peter Maier' will also be shown, but not documents containing 'Klaus Peter Maria Maier.'</p> <p><b>Search expressions within a clause</b></p> <p>Search expressions within a clause are searched for as follows:</p> <p>NEAR/S(Klaus Project Manager)</p> <p>Within the brackets multiple search expressions can be specified and combined. Here, AND is used to link, if nothing is specified.</p> <p><b>Combinations</b></p> <p>Use different operators to combine multiple search expressions.</p> <p>Example: Schulze AND Maier OR Müller</p> <p>However, you must use parentheses to specify the order of operation.</p> <p>Example: Schulze AND (Maier OR Müller)</p>
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You can find further details about special search functions here:

[http://lucene.apache.org/core/4\\_8\\_0/queryparser/org/apache/lucene/queryparser/classic/package-summary.html#package\\_description](http://lucene.apache.org/core/4_8_0/queryparser/org/apache/lucene/queryparser/classic/package-summary.html#package_description)

Searches using index data and **FULL TEXT** searches are combined with the logical **AND**. The hit list thus contains the documents which fulfill both the search criteria over the full text index and over the index data.

For the full text search for a date, which is part of the index data, you must enter the date in the following format: DD.MM.YYYY

## Extended Search Modes

The standard search extends the search across the basic form of search expressions and to parts of terms.

These extensions can be switched off by specifying a search mode:

MODE/B	No extension to parts of terms. Example: MODE/B&dreaming 'Dream' is found, but not 'dreamcatcher.'
MODE/D	Exact search, no extension to parts of terms and no extension beyond the basic form. Example: MODE/D&dreaming Neither 'dream' nor 'dreamcatcher' are found but 'dreaming' is found.

The mode is followed by '&' as separator before the search expression. Multiple search expressions following the mode without '&' in brackets.

Example: MODE/D(dream AND sleep)

For combinations of search expressions, different modes can be specified for the search expressions.

Example: MODE/D&dream AND MODE/B&sleep

Note that the modes are written in block capitals.

## Document Hit List

The document hit list will open in the results window.

Separators can be hidden/shown in the 'Results Window' Area of the settings dialog. The number of selected hits and the total number of hits are displayed in the status bar. In the right area is a button for saving the position of the window in the dialog view.

### View

Retrieved documents will be listed. Switch between the report and quicklook views by clicking the appropriate button on the status bar.

In the report view, columns can be selected from the fields of document index data, folder index data and basic parameters. The sorting of the list and the width of the columns can be changed with the mouse (see 'Settings for the Hit List').

### Display

The hit list can be grouped (see 'Grouping Hit Lists').

The documents in the hit list may be marked with the following icons:

- §  The document is approved for archiving and will be archived on an audit-proof basis during the next archiving run.
- § (no icon) The document is archived on an audit-proof basis.
- §  The document is not approved for archiving and will not be archived on an audit-proof basis during the next archiving run.

- §  The document has no pages, only the index data exists.
- §  The document is managed here as a cross-context reference. It can be opened, but only edited at its original location.

The documents can additionally be marked with one of the following icons indicating their access status:

- §  The document is being edited by another user. You can only open a copy of this document.
- §  The document is edited by you. W-Documents have to be checked in again. Other document types are automatically checked in after being filed.
- §  The document has been loaned out. You can only open a copy of this document. Documents can be loaned out and returned by external programs. Until they have been returned, they can be opened in enaio® but not edited.

The signature status can be flagged as follows:

- §  The current version of the document is signed.
- §  An earlier version of the document is signed.

W-documents can additionally have the icon:

- §  There are different variants of this document (see 'Creating Variants of W-Documents').

The functions on the ribbon tab **HITS** and the context menu are the same as those in the folder hit list (see 'Folder Hit List').

## Document Display Window

If you open an image document from a hit list or folder window using the **Open** button or by double-clicking, the document will be opened in the document display window.

W-Documents will open in the assigned W-application, e-mail messages in an e-mail window (see 'Editing E-Mails'), and video files in a video window in which they can be played back (see 'Editing Video Documents'). XML documents are shown in a browser window, and for container documents you decide whether the container opens or the content is extracted (see 'Editing Container Documents').

If the document has no pages, its data sheet will open with the index data.

Both the administrator and you can configure a confirmation dialog to appear before opening huge documents (see 'Confirmation' Area).

The size and position of the document display window can be changed with the mouse.

## OBJECT and IMAGE VIEW tabs

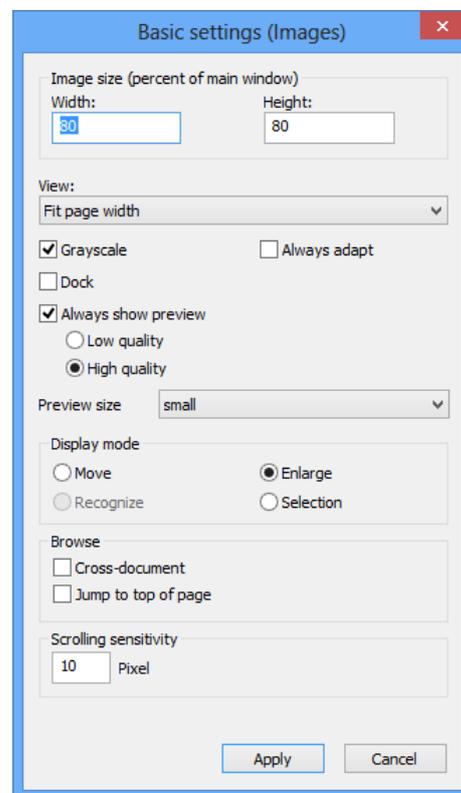
There are two ribbon tabs available for an open image document: **OBJECT** and **IMAGE VIEW**.

On the **OBJECT** ribbon tab, you will find all functions that are also available for folders (see 'Folder Hit List').

On the **IMAGE VIEW** ribbon tab, you will find all functions that are relevant for showing images, and you can specify the basic settings for the document display window here. Separate basic settings are saved for each document type.

1. Open an image document in the document display window.
2. Select **Settings** on the **IMAGE VIEW** ribbon tab.

The Basic settings window will open.



In the **Image size** section, you can enter the size values of the display windows in relation to the size of the application window.

From the **View** list, you can select the document size.

For black-and-white documents, you can choose the option **Grayscale**. Images will then be displayed smoothly through grayscale.

If you have chosen a value in percent in the **View** field, you can use the option **Always adapt** to fit the display window size to the selected view size. In **Dock** mode, the size settings are maintained for a page during browsing.

Use **CTRL+mouse wheel** to zoom in and out of the shown document.

You can select **Always show page preview** and specify the preview quality and size.

In the **Display mode** area, select one of the mouse functions. The option **Move** lets you move a rectangular selection of the document with the mouse, while the option **Enlarge** lets you select a section of the document and enlarge it.

With the **Cross-document** option enabled, you can use the **Browse** button to go from the last page of a document to the first page of the next document.

In the **Scrolling sensitivity** area, you can enter the number of pixels by which an image is moved if you turn the scroll wheel of the mouse by one notch.

3. Click **Apply** to save the basic settings.

Ⓡ Every document of the same type will be shown accordingly in the display window.



The document display window has different display options depending on the associated module.

The **IMAGE VIEW** ribbon tab contains the following buttons:

Page



Scrolls to the previous page in the image document.

Previous



Scrolls to the next page in the image document.

Next



Scrolls to the first page of a multiple-page document. If you have selected the **Cross-document** option in the basic settings, you can scroll from the first page of a document to the last page of the previous document in a hit list.

First



Scrolls to the last page of a multiple-page document. If you have selected the **Cross-document** option in the basic settings, you can scroll from the last page of a document to the first page of the next document in the hit list.

Last



Select a page in the displayed list (in a multi-page document).

Go to...



Export

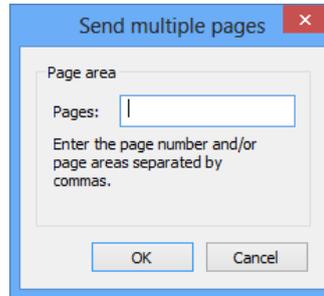
You export the index data (see 'Exporting Index Data').



Send as e-mail

Allows you to send the current page or several pages in the original format or as a PDF.

If you send several pages, you can specify the page range to be sent.



Text recognition

You can choose whether the current page or the entire document are sent to OCR.

Image



Rotate clockwise

Rotates the displayed document page 90 degrees.



Rotate counterclockwise

Rotates the displayed document page 90 degrees.



Invert

This button inverts the display of the document.



Contrast

The contrast of the image can be changed with a slider or by entering a percentage.



Brightness

The brightness of the image can be changed with a slider or by entering a percentage.



Gamma correction

Gamma correction corrects errors in the display due to the on-screen display of images. Gamma correction is a modification of brightness, but unlike the Brightness setting, it is not linear.



Conversion to grayscale

Color images can be displayed as grayscale images.

The color depth of the image and the display settings of your computer affect the number of used gray tones.



Window leveling

The window leveling feature enables you to highlight specific tone-ranges in grayscale images, or color images after grayscale conversion, through a Conversion to grayscale. Limit the range

of brightness with a slider and set a start color and an end color for this range. The gray tones of the selected range of brightness will then be mapped to the color range between the start color and the end color.

Window leveling is particularly useful for displaying medical images.

The original of an x-ray (right) and the same x-ray with window leveling (below)



Contrast histogram

The contrast histogram option lets you change the contrast of the image. Here, the starting point for changing contrast is not the median brightness (i.e. 127 for a 256 color image) but a value automatically determined through the image data. The intensity of contrast modification can be changed with a slider or by entering a percentage.



Histogram adjustment

Histogram adjustment is another way to modify contrast. As in the contrast histogram option, a median value is automatically calculated. The intensity of the contrast adjustment is also automatically calculated and is not linear, but rather, takes into account the distribution of values in the image.



Dock

If you turn or enlarge a page of the document, all other pages will be displayed similarly.

## Zoom



Zoom in

Zooms into the view in the display window.



Zoom out

Zooms out of the view in the display window.



Window width

Adjusts the size of the page view to the width of the display window.



Fit

Fits the page into the display window.

## Selection



Selection

Press and hold the mouse button to select an image area, then copy it to the clipboard with **CTRL+C**.

The selection, zoom, and move modes can only be activated one at a time.



Zoom in

You can drag a rectangle with the mouse and the rectangular content will then be enlarged to the size of the window.



Move

Press and hold the mouse button to move the document within the window.



Recognition

Activates the OCR mode (see 'Optical Character Recognition').

## View



Annotations

This button opens the document's annotation window. Here, you can create, modify, show, hide, and delete layers (see 'Annotations on Layers').



Pages

The page preview contains shrunk images of the document pages on the left of the document display window.



Summary

In the outline window you will see a shrunk image of the corresponding document (or the corresponding page in case of multi-page documents) and a frame around a certain part of the document. If the frame does not contain the entire document or page, the mouse pointer can be used as in the panning mode. The display will be adjusted accordingly.



Animate

The images of the document are displayed in succession.



#### Properties

Opens a list containing information about the displayed document, for example the file size and compression method.



#### Settings

Allows you to specify the basic settings for the document display window.

The optimized context menu only contains the most frequently used functions. If you do not use optimized menus, more functions from the ribbon tab will be shown in the context menu (see 'Workspace' area).

Most features can also be accessed through shortcut keys (see 'Keyboard Assignment for the Document Display Window').

The functions require a license. If you cannot access a feature, please contact the administrator.

## Optical Character Recognition

If optical character recognition is installed on the enaio® server, when editing you can:

- § recognize the document,
- § recognize the page,
- § recognize parts of the current page.

The entire document, the current page, or the section are sent to OCR. Via the settings (see 'Zonal OCR' Area) languages will be predefined for optical character recognition. The identified text is copied to the clipboard. You can paste the text from the clipboard to any location using **CTRL+V**.

If you have selected the option **Open index data after OCR** in your settings (see 'More' Area), the data sheet opens following recognition. You can paste the content of the clipboard into a field of the index data.

The context menu also offers to transfer the document or the active page to the optical recognition. If you press and hold **CTRL+Shift** you can change the language setting for the current recognition.

Activate the OCR mode to recognize a part of the active page:

- §  Click the **Recognition** button.  
With **CTRL+Shift** you can modify the language setting for the current section recognition.

- § Drag a rectangle with the held mouse button over an intended area.

The selected area will be transferred to optical character recognition that copies the text into the clipboard.

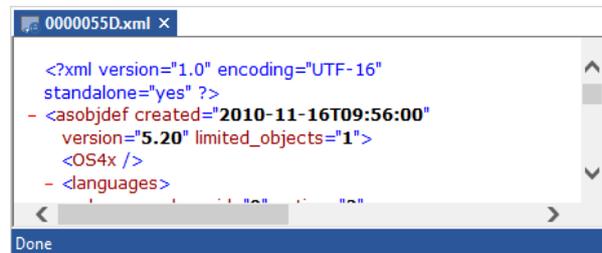
## Displaying XML Documents

XML documents will be administratively created through data import. You are only allowed to edit the index data.

The administrator assigns one or more style sheets to each XML document type.

If you open an XML document, the document will be shown with the preset style sheet.

You can choose a different style sheet from the list of assigned style sheets on the ribbon tab **XML Document**.



```
<?xml version="1.0" encoding="UTF-16"
standalone="yes" ?>
- <asobjdef created="2010-11-16T09:56:00"
version="5.20" limited_objects="1">
  <OS4x />
  - <languages>
```

The **Select style sheet** button in the file selection dialog enables you to choose a different style sheet.

Use the arrow buttons to open a document which in the folder window is located before or behind the displayed document.

## Basic Parameters Queries

You can search for folders, registers, and documents using the basic parameters, i.e. the properties of objects.

The administrator can disable basic parameter queries within the entire system, or, according to the fields 'Creator,' 'Modifier,' and 'Owner,' limit them to the user name entry.



When you open the index data, you will find the basic parameters on the **Basic parameters** tab. The tab is disabled by default and can be opened using the  **Basic parameters** button at the bottom of the index data form.

The data cannot be modified.

As a basic parameter, enaio® saves the **Creator**, the user who created the document, as well as the date and time of creation.

Under **Editor**, enaio® saves the user that last modified the document and the date and time that they did this. Editing includes changes to index data, changes to document pages, creation of a link, and deletion of a link.

Documents can be assigned a retention time by an administrator. Archived documents cannot be deleted until the retention period has expired.

The **Owner** is either the creator or the user to whom owner rights were assigned through the **Properties** dialog.

You can additionally search documents based on these properties:

- archived
- not approved for archiving
- approved for archiving
- w/o pages
- checked out by me
- checked out by others
- loaned out
- Reference

-  in register
-  in no register
-  location
-  has variants
-  current version is signed
-  an earlier version of the document is signed

The search criterion **On media** enables you to search for archived documents on a specific archiving medium.

In folder and register queries, you can restrict the query to objects without content. The respective hit list can contain all objects that are without content for all users. If an object is 'without content' due to the user not having necessary access rights, the object will not be listed. In folder and register queries, you can restrict the query to objects without content.

Queries with basic parameters cannot be created in expert mode and can only be saved in combination with other queries.

These are the steps for performing a basic parameters query:

1. Click the properties selection list in the **VIEW** ribbon tab and select one of the following basic parameter searches:

 Document basic parameters

 Register basic parameters

 Folder basic parameters

The basic parameters query form will open.

3. Fill out the query form.

Select the creator, editor, and owner from a dialog that you open with the corresponding button. The user name and full name are shown in the dialog.

4. Click the **Start query** button or press **ENTER**.

5. Select a folder type from the list.

The results window with the hit list will open (see 'Document Hit List').

The fields **from:** and **until:** contain the dates of creation and modification, as well as the exact time separated from the date by a space character in the format:

08.01.2003 10:18:01

If you only enter the date, the 'from' and 'until' fields will contain the times 00:00:00 and 23:59:59. If you do not enter minutes or seconds, 00 is added in each case. If you only enter hours, minutes, or seconds with one digit, a 0 will be added as the first digit.

If you search using only **From** fields, you will get a hit list of objects that were created or edited after the specified time. If you search using only **Until** fields, you will get a hit list with objects that were created or edited before the specified time.

Contrary to other query forms, the check boxes on the query form for basic parameters (document) have a neutral status when not checked.

The query behavior (see "Query Behavior' Area') specifies whether you will receive the hit list as a list of folders, registers, or documents.

If you press and hold the **CTRL+Shift** keys when opening a basic parameter search form, you can search using an object ID. If the found object with this ID is an inactive variant or a Windows document, the active variant will be displayed in the hit list.

## Combined queries

Queries for folders, registers, and documents, and basic parameters can be combined.

You can simultaneously use a query form for a folder type, one for a register type, one for basic parameters, one for basic parameters of folders, one for basic parameters of documents, and several search forms for document types.

When combining only the query forms for documents, you will receive different results as if you would combine them with other query forms.

If you combine query forms for documents, the hit list will, for example, contain these documents:

- § documents fulfilling all criteria of the first query form
- § or documents fulfilling all criteria of the second search form
- § and basic document parameters are also fulfilled

If the query forms for documents contain values for multiple fields, the hit list will contain these documents:

- § documents fulfilling the criteria of the first query form, independent of the values for multiple fields
- § or the criteria of the second search form are fulfilled regardless of the values for multi-fields
- § and basic document parameters are also fulfilled
- § and at the same time containing at least one value for a given multi-field, independent of the search form into which the value was entered.

If you combine query forms for documents, registers, folders, and basic parameters, the query forms will be evaluated like the fields of a single query form.

The hit list contains:

- § the documents fulfilling all criteria of one of the document query forms and those of the query form for the document's basic parameters
- § and the documents fulfilling the criteria of the document basic parameters search form
- § and likewise in the registers, those fulfilling all criteria of the register query mask and the register basic parameter query mask or those who

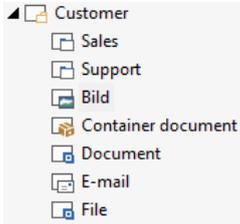
belong to no register. In Settings > Query behavior you can configure documents which are not in any register to be excluded

§ and are part of folders which fulfill all criteria of the folder query form and the basic folder parameters query form

You can combine query forms by dragging and dropping the icons from the object search as tab into a search form or by adding pages with the context menu.

You cannot combine query forms of different register types. The query behavior (see 'Query Behavior' Area) specifies whether you will receive the hit list as a list of folders, registers, or documents.

### Combining Queries

1.  Open the object search.
2.  Open a folder in the object search.
3. Double-click a document type, or a folder or register icon.  
The query form will open.
4. Fill out the query form.
5. Drag another document icon, register icon, folder icon, or basic parameters icon from the object search onto the first query form.  
The query form will now be added to the query as a tab.
6. Fill out the query form.
7. Click the **Start query** button or press **ENTER**.

The results window will open. The settings of the query behavior (see 'Query Behavior' Area) specify whether the folders, registers, or documents will be shown in the hit list.

The **INDEX DATA** ribbon tab contains the following functions:

#### Combined search



Search forms can be combined (see 'Combined Queries').

Add



After combining query forms, you can remove the query form of the foremost tab.

Remove

#### Search



Starts query.

**Execute****Calculate number**

The numbers of hits which match your query criteria are calculated.

**Save**

Stores the search form or the combined search forms as a query (see 'Saved Queries').

**Subscribe**

Subscribes to a query (see 'Subscribing to Queries').

**Reset page**

All entries in the fields of a query will be deleted. For a combined query, only the field contents of the top tab will be deleted.

**Reset query**

For a combined query, the field contents of all tabs will be deleted.

**Edit****Expert mode**

Open the search form in expert mode. In expert mode, logical conditions can be used to query the index data of fields (see 'Queries in Expert Mode').

**Variables**

Starts the process for saving a query as a 'Query with Variables' (see 'Saving Queries with Variables').

All functions are also available in the context menu of the index data form.

## Queries in Expert Mode

If your query returns an overly long hit list, you can also run any query in expert mode, apart from queries based on basic parameters. In expert mode, logical conditions can be used to query the index data of fields.

Entries in the full text section will be ignored in expert mode.

### Searching in Expert Mode

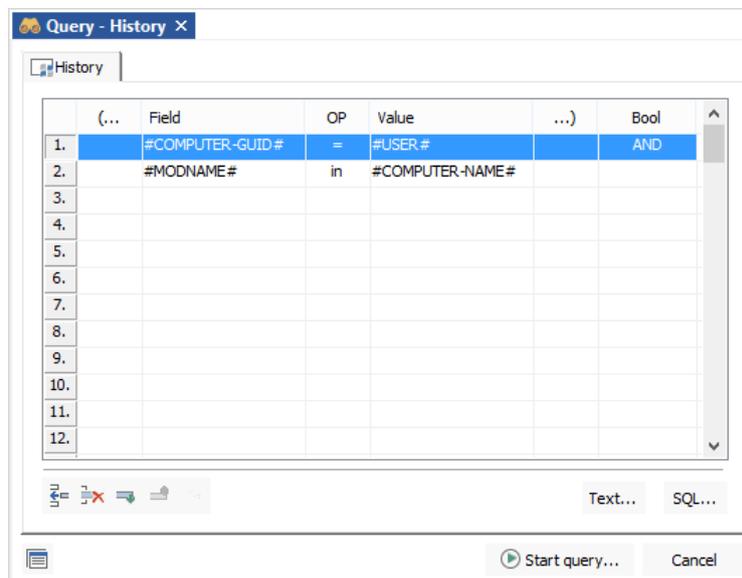
1. open a query form.
  2. Choose **Expert mode** from the context menu.  
Open the query form in expert mode.
  3. Enter the values.
  4. Click on **Start query**.
- ® The query will start.

For combined queries, you can activate the expert mode in each query form, except the basic parameters' query form.

When deactivating the expert mode using the context menu, data remain available and, when re-activating the expert mode, will be shown again. For queries, however, data are analyzed only if the query form is opened in expert mode. Likewise, expert mode data are saved only if the query form is opened in expert mode. Further data is not saved.

The expert mode is a database-based query feature which requires thorough knowledge of the used database, e.g. differences between '0' and 'ZERO'.

## Search Form in Expert Mode



In expert mode, a field, an operator, and a value are combined into a search expression. You can combine multiple search expressions with the Boolean operators, and change their logical order by adding parentheses. A search with the placeholders \* and ? is also possible.

Every table cell is connected with a deposited list. When you click on a cell, the list opens.

The lists of the **Field** column contain the index data fields, those in the **OP** column various operators, those in the **Value** column the values that correspond to the given index data field, and those in the **Boolean** column contain the Boolean operators. The lists associated with the columns one and five contain opening and closing parentheses.

Multi-fields are not listed in the **Field** column. The values in these fields which were entered before starting the expert mode will however not be evaluated.

The lists associated with the **Field** column contain all index data fields and the following specific values:

- § #User# – the user name,
- § #Date# – the current date,
- § #COMPUTER-GUID# – the GUID of the querying computer,
- § #COMPUTER-NAME# – the name of the querying computer,
- § #COMPUTER-IP# – the IP of the querying computer,
- § #ERSTELLDATUM# – the basic parameter creation date,
- § #ERSTELLNAME# – the name of the creator,
- § #MODDATUM# – the basic parameter modification date,
- § #MODNAME# – the name of the modifier.
- § #RETENTIONZEIT# – retention time of documents
- § #PRETENTIONZEIT# – planned retention time of documents

The cells of the **Value** column can be edited. According to the kind of index data field selected in the same cell, the catalog lists that have been set up for this field, will offer several specific values.

The following specific values may be available:

- § #User# – the current user name,
- § #Date# – the current date,
- § #Groups# – the groups in which the current user is a member (for group members use the operators 'in' or '!in'),
- § #Null# – a non-indexed field,
- § #COMPUTER-GUID# – the GUID of the querying computer,
- § #COMPUTER-NAME# – the name of the querying computer,
- § #COMPUTER-IP# – the IP of the querying computer.
- § #RETENTIONZEIT# – retention time of documents
- § #PRETENTIONZEIT# – planned retention time of documents
- § Field – you can select a field in the index data form and use its content as a value. It is advisable to compare only the content of fields with the same data type, otherwise the comparison would be useless.

In the cells of the **Value** column, you can enter multiple values separated by a comma. Combined with the operator 'in' you can search for documents that are indexed in this field with one of the values.

A checkbox has the value '1' if it is marked, and otherwise the value '0'. Radio buttons have the value '0' when their first value is selected, the value '1' when the second value is selected, and so on.

In the other columns, you can only choose values from the lists.

For example, you can search all folders of Berlin customers, i.e. ZIP codes between 10000 and 16000.

So would query form entries look like:

	(...)	Feld	OP	Wert	(...)	Bool
1.		PLZ	>=	10000		UND
2.		PLZ	<=	16000		

If you select a line by clicking the line number, the following line options will be available:



Inserts an empty line above the selected one.



Delete the selected line.



Move the selected line down under the following line.



Move the selected line above the previous one.



Cancel the previous action.

Use the buttons **Text** and **SQL** to view the search expressions as text or as an SQL command.

Start the query by clicking **Start query**. If a search expression contains errors, you will receive an error message. The respective erroneous cell will be highlighted in yellow.

# Editing Data

## Editing Data – Introduction

If you want to edit data, it is important to distinguish between the index data and the documents. The index data, including that of folders and registers, can be edited at any time. And there are differences between editing documents which were archived in an audit-proof manner and documents which were not archived in an audit-proof manner.

Documents which were archived in an audit-proof manner cannot be edited, only their index data. However, these documents, which were archived in an audit-proof manner, can be copied, moved within the archive, deleted, or exported.

Documents which were not archived in an audit-proof manner can also be edited.

Image documents can have pages added to them or removed from them. Unlike in image editing programs, you cannot edit the actual pages.

You can open and edit W-documents in the assigned external W-program.

If you edit an object's data or create a new object, the object is listed in the history (see 'History').

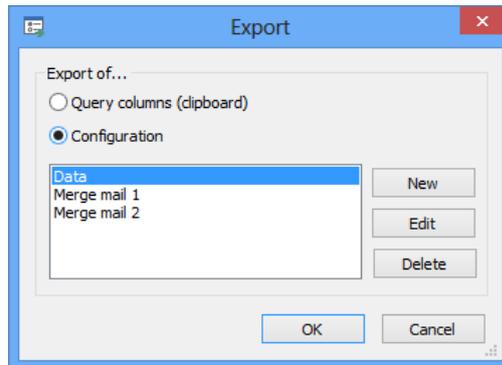
### Exporting Index Data

You can export the index data of folders, registers, or documents into the clipboard or a file, for the use in other programs, e.g. for form letters.

1. Search for objects.
2. Select one or more folders, registers, or documents.
3. In the **HITS** ribbon tab, click  **Export** >  **Index data**  
The **Export** window will open.
4. Set the export setting (see 'Export Settings').
5. Confirm with **OK**.

® The index data will be exported in accordance with the export settings (see 'Export Settings').

## Export settings



In the settings for the export function, you can choose between:

§ Query columns (clipboard)

The content of the query columns, as displayed in the results window, will be exported to the clipboard.

§ Configuration

This option lets you select a configuration for export.

A configuration specifies which field of the index data are exported and where they are exported to. You can select a configuration from the list or create a new one.

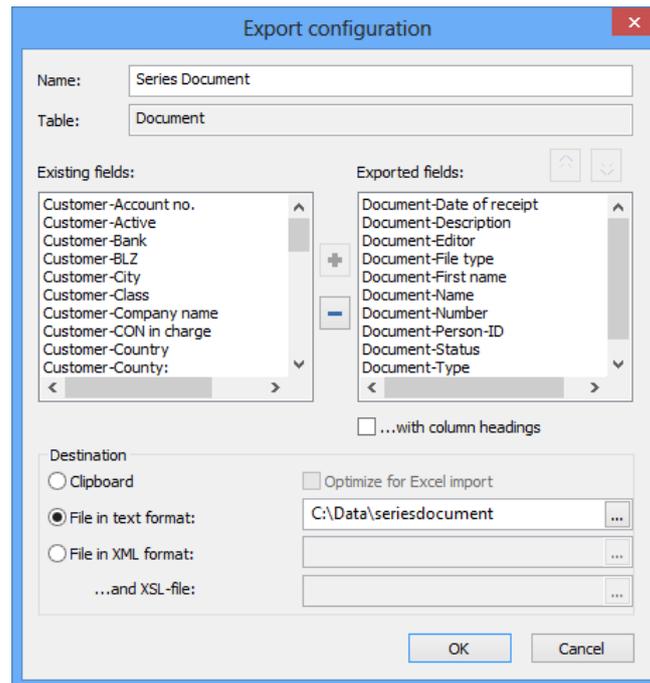
The configuration is saved for each user.

### Creating Export Configurations

After a folder, register, or document query, a hit list has been opened. Follow the steps below:

1. Open the Export window by clicking **Export > Index data** on the **HITS** ribbon tab.
2. Click on the **New** button.

The export configuration window is opened.



3. Enter a configuration name into the first field.
4. Select the index fields of the data sheet to be exported, from the Existing fields list
5. Click on the arrow button.

The fields will be entered into the Exported fields pane.

Use the arrow buttons to sort the entries. The field names can be used as column headings.

6. Select the clipboard or a file as the export destination.

The format can be a text file or an XML file. An optionally defined XSL file will interpret the XML file to open it as an HTML file in your default browser. Save this HTML file with the browser functions if you want to use it at a later time.

When exporting to the clipboard, you can have the export data optimized for Microsoft Excel. The values are then put between quotation marks and the characters 'LF' indicate line breaks.

7. Confirm with **OK**.
- ® The configuration will appear highlighted in the **Export** window. It will be available for all users.

## Editing Folders

You can delete folders and edit the index data of folders. The index data can be exported.

## Delete folder

Deleted folders are moved to the trash can. Data will remain in the trash can until the folders are deleted. Data in the trash can are not included in queries. Objects can be restored from the trash can (see 'Trash Can').

To access the trash can, you will need the appropriate system role. Access rights and system roles are assigned by your administrator.

Follow these steps to delete a folder:

1.  Start a folder query from the object search (see 'Folder Queries').  
The results window with the hit list will open.
  2. Select one or more folders.
  3.  Click the **Delete** button or press the **DEL** key.  
A confirmation dialog will appear (see 'Confirmation' Area').
  4. Confirm with **OK**.
- Ⓜ The folder or folders will be deleted.

Documents in a folder will also be deleted. The confirmation dialog which appears before deletion refers to all selected folders. Folders will not be deleted if you do not have the authorization to delete their content. Folders can still be deleted even if other users are editing the index data.

## Editing the Index Data of Folders

On a folder hit list, you can change the index data of folders.

The administrator may specify that the index data of folders or of individual fields cannot be changed.

Follow these steps:

1.  Start a folder query from the object search (see 'Folder Queries').  
The results window with the hit list will open.
2. Select a folder from the hit list.
3.  On the menu ribbon, click **HITS** on **Index data > Index data editing**.  
The data sheet will open.

The screenshot shows a dialog box titled 'Folder basic parameters' with a tabbed interface. The 'Customer data' tab is active, displaying various input fields for a customer record. The fields and their values are: Company name: Krüger; Note: New branch office; Street: Olivaer Platz 7; Country: D; City: (empty); County: Berlin; Phone: (empty); Fax: (empty); E-mail: info@e-mail.com; Internet: www.krueger.de; Class: Erstkontakt Anwender. The dialog also includes a toolbar at the bottom with icons for file operations and buttons for 'Save' and 'Cancel'.

4. Enter the changes.
  5. Click **Save**.
- Ⓜ The index data will be changed, the hit list updated.

If another user changes the index data after you have opened the data sheet, you will be notified. You will have to reopen the index data to make changes.

You can find the following functions in the data sheet context menu:

-  **Copy**  
The index data will be copied.
-  **Paste**  
Copied index data will be pasted.
-  **Previous index data**  
The data sheet of the previous object in the hit list will be shown.
-  **Next index data**  
The data sheet of the next object in the hit list will be shown.
-  **Open**  
The folder window will open.
-  **Reset**  
The index data will be deleted.
-  **Print**  
The data sheet will be printed.

You can change the index data of multiple folders simultaneously. If you select the folder and open the index data, an empty data sheet is displayed. The index data will be displayed for fields that have identical indexing. Fields that you do not edit will not be changed.

If you enter a value into a field, the index data of all folders will be written over with this value. If you enter a term beginning with a '+', the new values will be appended. Values with an '&' will be put in front and behind the existing index data.

The index data will be deleted if you enter a '-'.

To make changes in batch mode, you need the system role 'Client: Execute changes in batch mode'. When changing the index data of multiple registers at a time, required fields, key fields and read-only attributes will not be taken into account. Data in tables cannot be modified. Add-ons will also not be executed. If you enter a term beginning with '+' or '&', the value will only be appended to empty fields.

## History of Folders

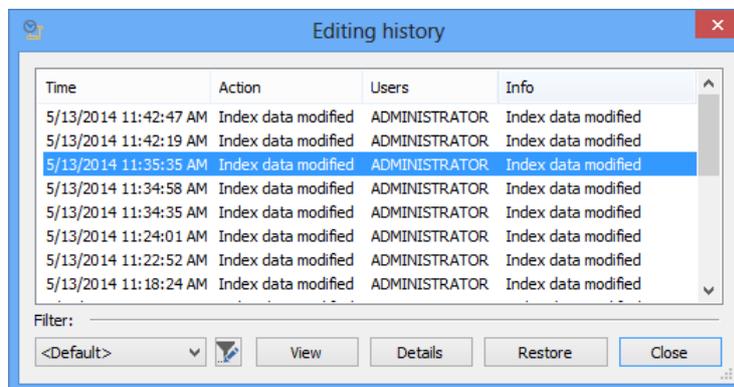
In the history of a folder, changes to the index data are logged. The administrator can individually configure for every folder type, whether earlier versions of the index data can be restored.

The saving of index data versions, i.e. the index history, can be configured for an object type as a whole or individually turned on/off for every object type. Turn the index history for an object on or off in the **Properties** dialog.

To do so, you will need the appropriate system role. Access rights and system roles are assigned by your administrator.

The history of a folder can be opened using the context menu or the **F11** key.

The 'Only changes' filter is preset, which only shows changes to the object.



If you select an item, you can use the **Details** button to view more detailed information.

If old index data versions have been saved for a folder type, you can access the changes for each entry by clicking the **View** button, you will then see the data sheet with the index data before the change. The form is read-only.

The **Restore** button also opens the data sheet with the old index data. You can save the old version of the index data, with or without having edited it first.

Restoring and editing of earlier index data versions will also be logged in the history.

For subscriptions with notification, notification is also logged in the history.

You can define view filters for the history:



This button opens the **Filter management** window.

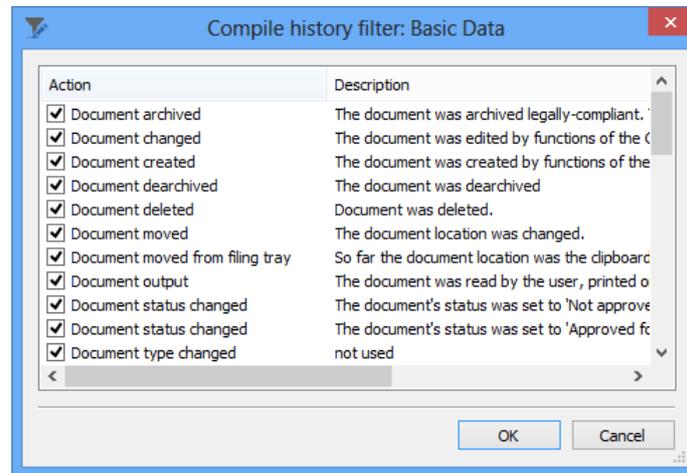
View filters which have already been set up are listed.

### Creating Filters

1. Click on the **New** button.  
A new view filter will be added.
2. Enter a name for the view filter into the selected field.

3. Click the **Edit** button.

The Compile history filter window will open.



4. Select the actions which are to be shown in the history in the **Action area**.

5. Confirm your entries with **OK**.

The new filter will be shown in the **Filter management** dialog.

6. Select the new filter in filter management, if you want to set it up as a default filter.

7. Confirm with **OK**.

The set up filters can be edited or deleted in the **filter management** window. If you activate a filter in Filter management it will automatically be applied as a default filter every time a history window is opened. Another view filter can subsequently be set manually. If no default filter is active in filter management, the filter manually set in the history window will be applied again when the window is next opened.

The filters 'No filter' and 'Only changes' cannot be edited. The 'Only changes' filter remains automatically preset if you do not set a different filter yourself.

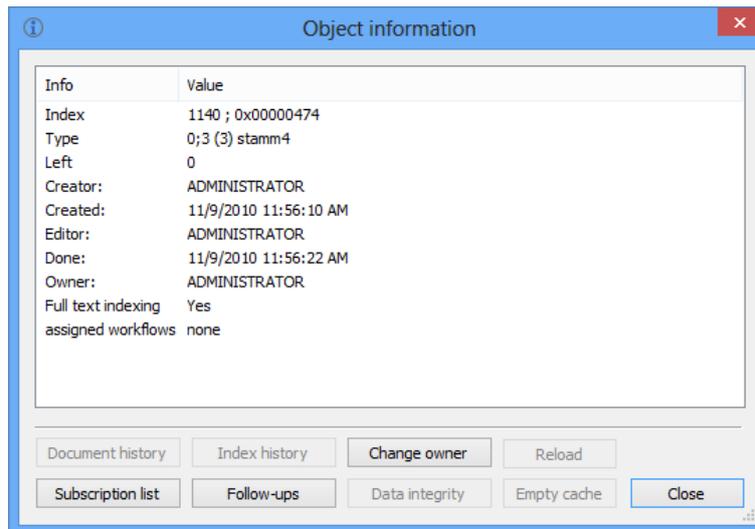
If you want to edit the name of the filter, click on the name to select it and then click again on the selected name. Click again to make the field editable.

The history filter settings are saved for each user and are valid for the history of all object types.

## Folder Properties

For every folder, properties can be viewed. The property contains data on the basic parameters and information which is useful for administrative tasks.

In order to access the properties, you need the appropriate system role. Access rights and system roles are assigned by your administrator.



Users who are allowed to set up subscriptions for other users can use the **Subscription list** button to view a list of all users that have subscribed to the archive object.

Via the property, owners of an archive object and users with owner rights can change the object's owner.

The **Change owner** button will open a dialog with a list of all current users from which you can select a new owner.

The index history can be configured to be enabled or disabled for the entire object type or for every object of the type. If you have the appropriate system role, you can accomplish the latter by clicking the **Index history** button to turn the index history on or off. Access rights and system roles are assigned by your administrator.

From the context menu you can copy data to the clipboard.

## Editing Registers

You can move, copy, and delete registers, and you can edit their index data. The index data from tabs can be exported.

### Deleting Registers

Deleted registers are moved to the trash can. Data will remain in the trash can until the registers are deleted. Data in the trash can are not included in queries. Objects can be restored from the trash can (see 'Trash Can').

To access the trash can, you will need the appropriate system role. Access rights and system roles are assigned by your administrator.

Follow these steps to delete registers:

1. Select one or more registers from the hit list or from the right area of a folder window.

2. ✘ Click the **Delete** button or press the **DEL** key.  
A confirmation dialog will appear (see "Confirmation' Area'). Select whether you wish to delete the register or if necessary only remove it from its current location.
3. Confirm with **OK**.

The register or registers will be deleted.

Documents in a register will also be deleted. The confirmation dialog which appears before deleting refers to all selected registers. Registers will not be deleted if you do not have the authorization to delete their content. Registers can still be deleted even if other users are editing the index data.

### Moving Registers

Follow these steps to move a register to another location:

1. Select a register from the hit list or from the right area of a folder window.
2. Drag the register, holding pressed the mouse button, onto the icon of a folder or register in a folder window or hit list.  
A confirmation dialog will appear.
3. Confirm with **OK**.

Ⓜ The register will be moved together with its content.

With the left navigation pane of the folder window, you can move registers holding the mouse button pressed within a folder.

Registers can still be moved even if other users are editing the index data. The moving of registers can be globally prohibited.

### Copying Registers

Follow these steps to copy a register:

1. Select a register from the hit list or from the right area of a folder window.
2. Press the Ctrl key and drag the register with the pressed mouse button onto a folder or register icon in a folder window or hit list.  
A confirmation dialog will appear.
3. Confirm with **OK**.

Ⓜ The register will be copied. If the register contains documents, references to these documents will be created.

If one of the index data fields is a key field (see "Index Data Forms'), the register cannot be copied. Registers can only be copied into within the same cabinet. Add-ons are not executed.

Use the **Create copy** function in a register context menu in the contents area or a hit list to create a new, blank register at the location of the original register. The index data form with the data of the copied register will then open. The data can be edited.

This function can be disabled by the administrator.

### Editing the Index Data of Tabs

On a register tab of a data sheet, you can change the index data of registers. Through a register or document query, and from the contents area of a folder window, you can open the register tab of a data sheet in order to change the index data.

The administrator can specify that the index data of registers or individual fields cannot be modified.

Follow these steps to edit the index data of a register:

1. Select a register from the hit list or from the right area of a folder window.
2.  Click the **Edit index data** button.

The data sheet will open. It contains tabs for the register and the folder in which the register is located.

3. Enter the changes on the register tab.  
The index data, including that of folders and registers, can be edited.
4. Click **Save**.

Ⓜ The index data of the register will be changed and the hit list updated.

If another user changes the index data after you have opened the data sheet, you will be notified. In order to make changes, you have to open the data sheet again.

You can find the following functions in the data sheet context menu:

-  **Copy**  
The index data will be copied.
-  **Paste**  
Copied index data will be pasted.
-  **Previous index data**  
The data sheet of the previous object in the hit list will be shown.
-  **Next index data**  
The data sheet of the next object in the hit list will be shown.
-  **Open**  
The folder window will open.

 **Determine location**  
The location will open.

 **Reset**  
The index data will be deleted.

 **Print**  
The data sheet will be printed.

You can change the index data of multiple registers simultaneously. Select the registers and open the index data to display a blank data sheet. The index data will be displayed for fields that have identical indexing. Fields that you do not edit will not be changed. If you enter a value into a field, the index data of all registers will be written over with this value.

If you enter a term beginning with a '+', the new values will be appended. Values with an '&' will be put in front and behind the existing index data.

The index data will be deleted if you enter a '-'.

To make changes in batch mode, you need the system role 'Client: Execute changes in batch mode'. When changing the index data of multiple registers at a time, required fields, key fields and read-only attributes will not be taken into account. Data in tables cannot be modified. Add-ons will also not be executed. If you enter a term beginning with '+' or '&', the value will only be appended to empty fields.

## History of Registers

In the history of a register, as in the editing history of folders, index data changes are logged. The administrator can individually configure for every register type, whether earlier versions of the index data can be restored.

Saving of index data versions, i.e. the index history, can be enabled for an object type as a whole, or individually enabled or disabled for each object of an object type. Turn the index history for an object on or off in the property.

To do so, you will need the appropriate system role. Access rights and system roles are assigned by your administrator.

The history of a register can be opened via the context menu or with the **F11** key.

For every entry in the history, you can open a detailed view. If you save earlier index data versions for the register type, you can show, restore, and edit them (see 'History of Folders').

Restoring and editing of earlier index data versions will also be logged in the history.

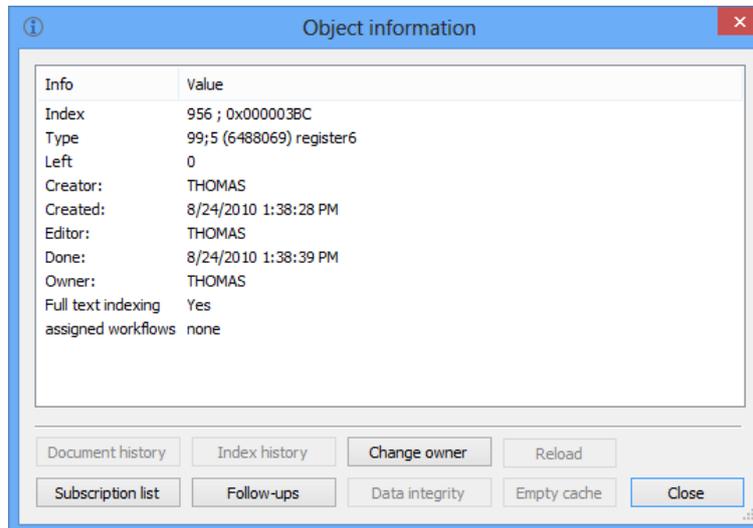
For subscriptions with notification, notification is also logged in the history.

For the history you can define view filters (see 'History of Folders').

## Register Properties

For every register, properties can be viewed. The property contains data on the basic parameters and information which is useful for administrative tasks.

In order to access the properties, you need the appropriate system role. Access rights and system roles are assigned by your administrator.



Users who are allowed to set up subscriptions for other users, can use the **Subscription list** button to view a list of all users that have subscribed to the archive object.

Via the property, owners of an archive object and users with owner rights can change the object's owner.

The **Change owner** button will open a dialog with a list of all current users from where you can select a new owner.

The index history can be configured to be enabled or disabled for the entire object type or for every object of the type. If you have the appropriate system role, you can accomplish the latter by clicking the **Index history** button to turn the index history on or off. Access rights and system roles are assigned by your administrator.

From the context menu you can copy data to the clipboard.

## Editing Documents

There are some differences between the options for editing **image documents** and the options for editing **W-Documents**.

And there are differences between editing documents which were **archived in an audit-proof manner** and **documents which were not archived in an audit-proof manner**.

As W-Documents are usually shown and edited in W-applications, W-Documents are blocked every time they are viewed or edited and must be **checked in**

afterwards. As soon as they are checked in, other users can edit them again. This eliminates conflicts caused that would be caused by multiple users editing the same W-Document. You can automatically check-in W-Documents using enaio® office-utilities.

For documents which have cross-context references, the document pages can only be edited at the original location.

➤ Cross-type references are marked with a special symbol.

## Deleting Documents

The administrator can configure the client to not allow users to delete documents of a specific document type. This also applies to all documents in your filing tray. In order to delete archived or checked-out documents, you need the appropriate system role. Documents can also be deleted if other users are editing the index data.

In the settings, you can decide whether deleting documents requires confirmation (see 'Confirmation' Area'). If you delete several documents at a time, the confirmation dialog refers to all selected documents.

Deleted documents are moved into the trash can. Data will remain in the trash can until the documents are deleted. Data in the trash can are not included in queries. Objects can be restored from the trash can (see 'Trash Can').

To access the trash can, you will need the appropriate system role. Access rights and system roles are assigned by your administrator.

These are the steps for deleting documents:

1. Select documents from the hit list, folder window, or filing tray.
2. Click the **Delete** button.

A confirmation dialog will appear. If you delete the document at a location, select whether you wish to completely delete the document or if necessary only remove it from its current location.

§ Confirm the confirmation dialog with **OK**.

® The documents are moved to the trash can and the display is updated.

Documents with multiple locations cannot be deleted from the hit list. If you try to delete a document with multiple locations from the hit list, you are notified that the document has multiple locations. Switch to the locations of the document and delete it there (see 'Documents with Multiple Locations').

For documents for which reference documents exist, you are also notified and can select delete options in the dialog.

## Editing the Index Data of Documents

The administrator may specify that users may not edit the index data of documents or individual fields.

Follow these steps to edit the index data:

1. Select a document from the hit list, folder window, or filing tray.
2. Click the **Edit index data** button.  
The data sheet will open. On the tabs you will find the index data of the folder, register, and document.
3. Edit the index data.  
You can edit the index data of the document, folder, and register.
4. Confirm the changes with **OK**.  
® The index data will be changed.

If the index data was modified by another user after you opened it, you will see a message to that effect. You will have to reopen the index data to make changes.

You can find the following functions in the data sheet context menu:

-  **Copy**  
The index data will be copied.
-  **Paste**  
Copied index data will be pasted.
-  **Previous index data**  
The data sheet of the previous object in the hit list will be shown.
-  **Next index data**  
The data sheet of the next object in the hit list will be shown.
-  **Open**  
The folder window will open.
-  **Determine location**  
The location will open.
-  **Reset**  
The index data will be deleted.
-  **Print**  
The data sheet will be printed.

You can change the index data of multiple documents of a single type simultaneously. Select the documents and open the index data to display a blank data sheet. The index data will be displayed for fields that have identical indexing. Fields that you do not edit will not be changed. If you enter a value into a field, the index data of all documents will be overwritten with this value.

If you enter a term beginning with a '+', the new values will be appended. Values with an '&' will be put in front and behind the existing index data.

The index data will be deleted if you enter a '-'.

To make changes in batch mode, you need the system role 'Client: Execute changes in batch mode'. When changing the index data of multiple documents at a time, required fields, key fields and read-only attributes will not be taken into account. Add-ons will also not be executed. If you enter a term beginning with '+' or '&', the value will only be appended to empty fields. You cannot index tables and multi-fields in this way. Changes in batch mode to objects in the filing tray are also impossible.

In the data form of a document, only the index data of the first page is displayed in multiple fields. If other pages are indexed, a semicolon and three periods (;..) follows the value. The index data can be changed by clicking the **Catalog** button.

## Changing the Archiving Property

Depending on the settings (see 'Document Display Window'), documents either receive the property **Approved for archiving** or **Not approved for archiving** during capture. If the administrator has not configured documents to be archived in an audit-proof manner, you can change this setting.

Documents without **pages** cannot be archived in an audit-proof manner.

Follow these steps to edit the archiving property:

1. Select documents from a hit list or folder window.
  2. Open the context menu by right clicking.
  3. Select **Approved for archiving** or **Not approved for archiving**.
- Ⓜ The archiving property of the documents will be changed, and the display will be updated.

You need to have writing rights for index data and the document as well as the system role 'Client: Change archiving status'.

If you want to set the property **approved for archiving** or **not approved for archiving** for all documents in a folder or register, select one or more folders or registers and set the property with the context menu.

## Moving Documents within the Archive

You can move documents within the archive using the mouse.

Documents from the filing tray can only be moved into one type of folder, that which was set up for the document type.

These are the steps to move a document within a cabinet:

1. Select a document from a folder window, a portfolio or filing tray.

2. Open a folder window as target.
3. Move the document to the destination by dragging with the mouse.
4. If you drag the document onto a folder in a different cabinet, you choose a document type and fill in the type-specific index form.

Ⓜ The document is moved.

You can select multiple documents and move them within a cabinet.

If you drag the object while holding the right mouse button, a context menu will open. Select whether you want to move the document or copy it to another location.

The administrator can restrict or disable the ability to move documents that are not in the filing tray for the entire system, or make this dependent on system roles. Documents can also be moved even if other users are editing the content or the index data.

### Moves across cabinets

A document can be moved to a different cabinet. If there are several document types to which the document may be assigned, you must select a document type. If there are index data fields with the same internal name, the data is transferred from these fields. Data of fields that cannot be assigned to other fields with the same internal names is lost and cannot be restored.

The index data form is opened after being moved. If indexing is canceled, the move is not undone. Canceling can also lead to inconsistent data, for example from unpopulated mandatory fields. The administrator can switch off opening of the index data form.

All information linked to a document, e.g. notes, desktop shortcuts, history, etc. is also transferred.

Via the index data history only the history of the data that was assigned to a field with the same internal name can be viewed and only this data can be restored.

Archived documents or documents being edited by other users cannot be moved to a different cabinet.

When multiple documents of the same type are moved to a different cabinet, the index data forms are not opened. The Administrator can switch off the function for moving multiple documents.

You require the system role of the same name in order to move across cabinets.

### Assigning Multiple Locations to Objects

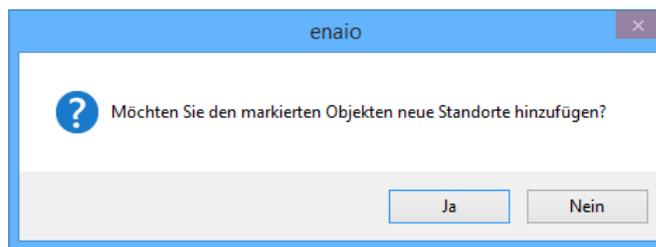
Documents usually consist in the document file, the index data, and one location. You can create more than one location for documents by adding a reference for new location in a new register or folder.

Index data and document files can be edited in exactly the same fashion from all locations.

If a document has more than one location, the location tab for its data sheet contains buttons for switching between the index data of the folders and registers in which the document is located.

Follow these steps to add new locations:

1. Select a document from a folder window, a portfolio or filing tray.
2. Open, as destination, a folder or register.
3. Drag the document to the destination while holding the Ctrl key.

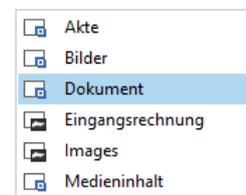


® A new location is assigned to the document.

## Creating References to Documents

If you drag the object while holding the right mouse button, a context menu will open. You select whether you add another location to the document, whether to create a copy (see 'Copying Documents'), or if you move the document, or whether you create a reference for the document.

➤ If you create a cross-context reference document, you assign other index data to the document file. Select a document type that corresponds to the file format, and enter the index data. If there are fields with the same internal name, then the index data are already entered. Data in tables are not already entered.



The document can receive any location. When working with references, however, you cannot edit the document file. You can only edit the document file through the original file.

The administrator can enable and disable the creation of reference copies for the entire system.

## Deleting documents with multiple locations

Documents can be deleted either from a hit list or from a folder window.

Documents with multiple locations cannot be deleted from the hit list. If you try to delete a document with multiple locations from the hit list, you are notified that the document has multiple locations. Switch to the locations of the document and

delete it there. You delete a document only at one location. All other locations remain intact. The deleted location data cannot be restored.

## Copying Documents

You can copy documents. When doing so, first the index data form opens, then the document opens in a corresponding module or a windows program. There, you can edit the copy.

Drag and drop a document to copy a reference into another folder window.

A copy of the document will be saved at the same location as the original.

Follow these steps to copy a document:

1. Select a document from the hit list, folder window, or filing tray.
  2. Open the context menu by right clicking.
  3. Select **Create copy**.  
The index data form opens.
  4. Edit the index data.
  5. Confirm the changes with **OK**.  
A copy of the document will open in a module or W-program.
  6. Edit the copy.
  7. Save the copy.
  8. Update the document display.
- ® The copy is saved in the same location as the original.

Copies of W-documents have to be checked in.

If you drag a document onto a folder or register while holding down the right mouse button, you can select the feature **Create copy here** from the context menu to create a copy of the document.

If you drag a document onto the folder of a different cabinet while holding the right mouse button, a copy of the document can be created there as well. To do so, select the required document type and index the document.

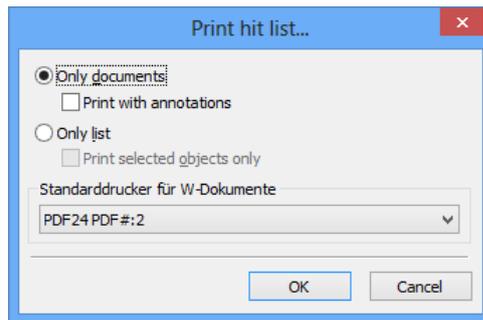
If the selected document type has fields with identical internal names, the index data of the source document will be automatically preset.

## Printing Documents

To print documents, users require the system role 'Client: Print documents'.

W-documents are printed from W-applications.

If you want to print documents from a hit list, choose whether to print the documents or the list.



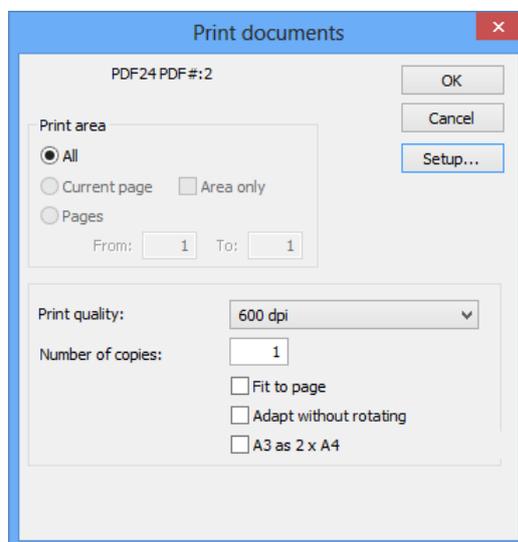
You can add annotations on layers to image documents (see 'Annotations on Layers'). If you want to print annotations, too, activate this print option. If you do not have the right to hide annotations, they will always be printed.

The dialog for printing black-and-white documents differs from the dialog for printing color and grayscale documents. The settings in the print dialogs will be saved. Thus, your settings for black-and-white printing, and those for color and grayscale printing, can be managed separately.

You can also select the printer to be used. The standard printer is selected by default. If you select a different printer, this will be automatically set up as standard printer for your workstation.

### Print Dialog for Black-and-White Documents

When a document is open, you open the print dialog for black-and-white documents via the ribbon tab **OBJECT** using the **Print** button, or the quick access toolbar.



Select a printer by clicking the **Setup** button.

In the **Print range** area you can choose whether to print **All pages** or only **Specific pages**. It is also possible to print the currently shown **Selection** from the **Current page**.

You can select **print quality** and the number of **copies**.

The **Fit to page** feature lets you scale the image or section to fill the page. A4- and A3-horizontal formats will be rotated to do so.

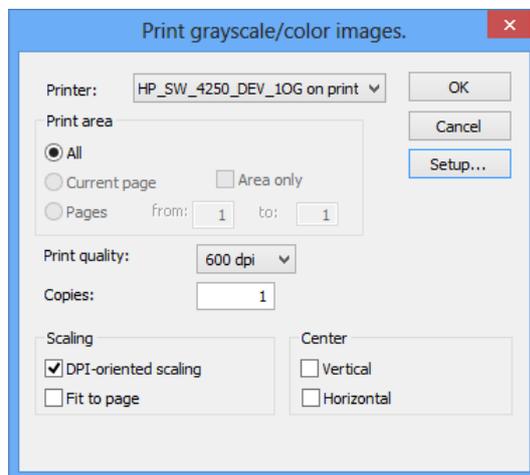
If you choose a horizontal format, but do not want it to be rotated, select the feature **adapt fit without rotating**.

A3-images can be split and printed as two A4-pages.

Layers which cannot be edited will be printed. The administrator can set up footers and headers for printing. These headers and footers will appear in the prints of all image documents.

### Print Dialog for Color or Grayscale Documents

When a document is open, you open the print dialog for color or grayscale documents via the ribbon tab **OBJECT** using the **Print** button, or the quick access toolbar.



Select a printer from the printer list and use the **Setup** button to configure it.

Under **Print range** you can choose whether to print **All pages** or only **Specific pages**. It is also possible to print the currently shown **Selection** from the **Current page**.

You can select **print quality** and the number of **copies**.

You can set whether to print in black-and-white or in color.

You can choose to center the images **horizontally** or **vertically**.

With the **DPI related scaling** option, you can match the image resolution to the print resolution, e.g. a 150-dpi image will be printed twice as large if the option 300 dpi is selected.

The **Fit to page** feature lets you scale the image or section to fill the page.

Layers which cannot be edited will be printed. The administrator can set up footers and headers for printing. These headers and footers will appear in the prints of all image documents.

## Signing Documents Electronically

You can sign all documents electronically verify the electronic signatures of all documents.

For image documents and W-documents in PDF format, the signature is inserted into a PDF version of the file. For the signature, the user chooses a signature type.

All other W-documents, as well as e-mail messages and XML documents, are given an external signature. External signatures are created without entering a signature type or a location.

Film and container documents are not signed.

In enaio® different signature modules can be integrated. SecSigner only permits external signatures without signature type. Sign and verification may vary slightly depending on signature module and version. You need a card-reader device, a signature card, the PIN, and an installed copy of Adobe Reader®.

Signed documents are marked as follows:



The current version of the document is signed.



An earlier version of the document is signed.

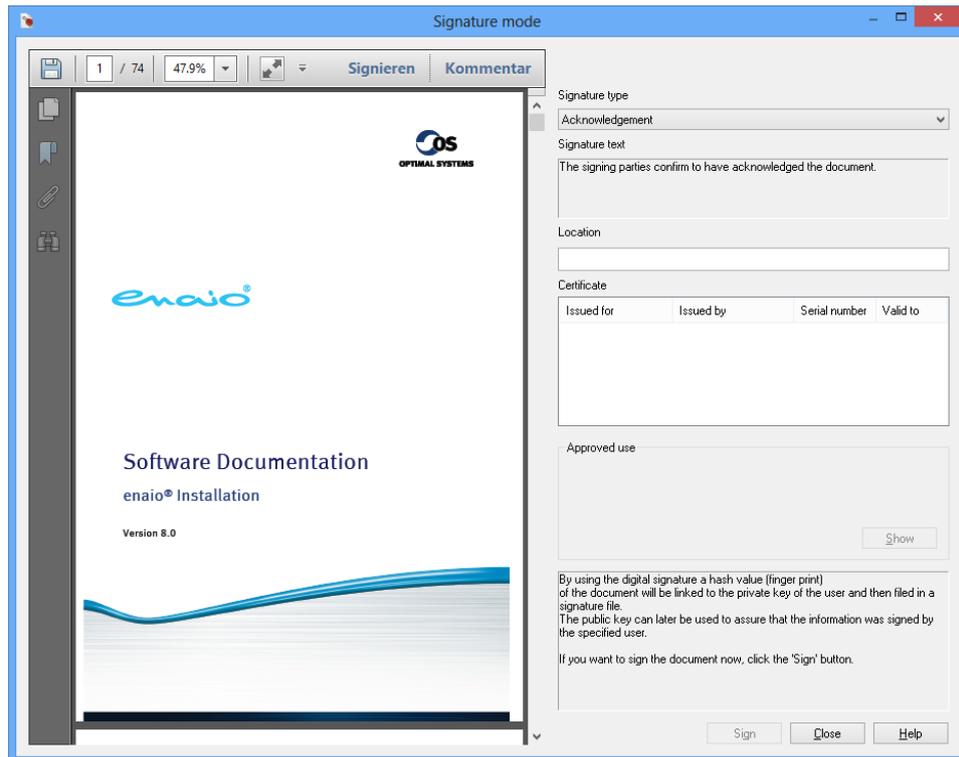
enaio® can be configured so that users have to enter their passwords before a document can be opened in signature mode.

### Signing – PDF

These are the steps for signing image documents and W-documents in PDF format:

1. Select the document.
2. On the ribbon tab **OBJECT** click on **Signature** in the area **Edit** or use the keyboard shortcut **CTRL+S**.

The document is opened in **signature mode**.



3. Select the intended **Type of signature** from the list.  
The signature types are configured by the administrator.
4. Enter a **location**.
5. Click the **Sign** button.
6. Sign the document with your card reader device, signature card, PIN or password.  
The signature is confirmed.
7. **Close** signature mode.

® The document is now electronically signed.

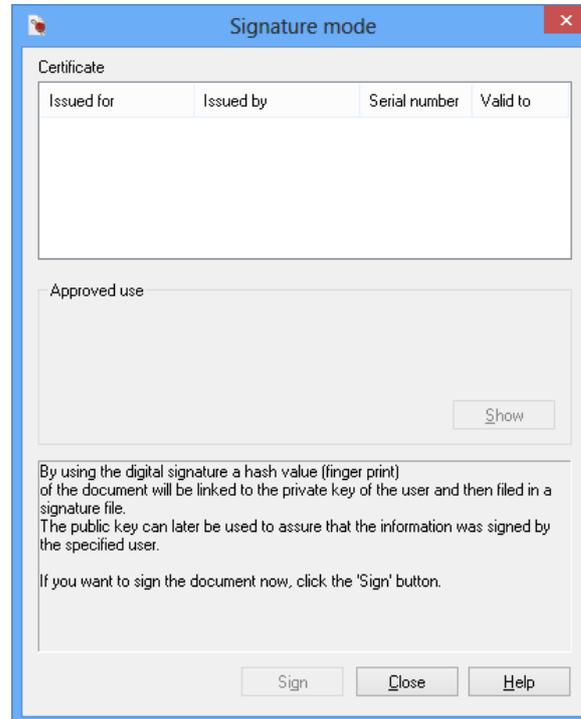
You can also select multiple documents and open them in symbol mode. You can switch between documents with buttons. Clicking the **Sign** button signs all open documents.

### Creating External Signatures

W-documents which are not in PDF format, e-mail messages and XML documents are signed using an external signature. External signatures are created without entering a signature type or a location. For these signatures, the document is not automatically displayed.

1. Select the document.

2. Click **Signature** in the ribbon tab or use the keyboard shortcut **CTRL+S**. The signature dialog will open.

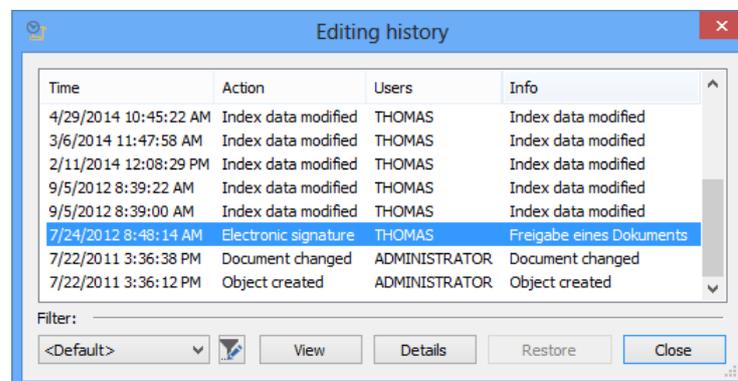


A new version of the document is created. You sign this version.

3. Click the **Sign** button.
4. Sign the document with your card reader device, signature card, PIN or password.  
The signature is confirmed.
5. **Close** signature mode.

### Verifying Electronic Signatures

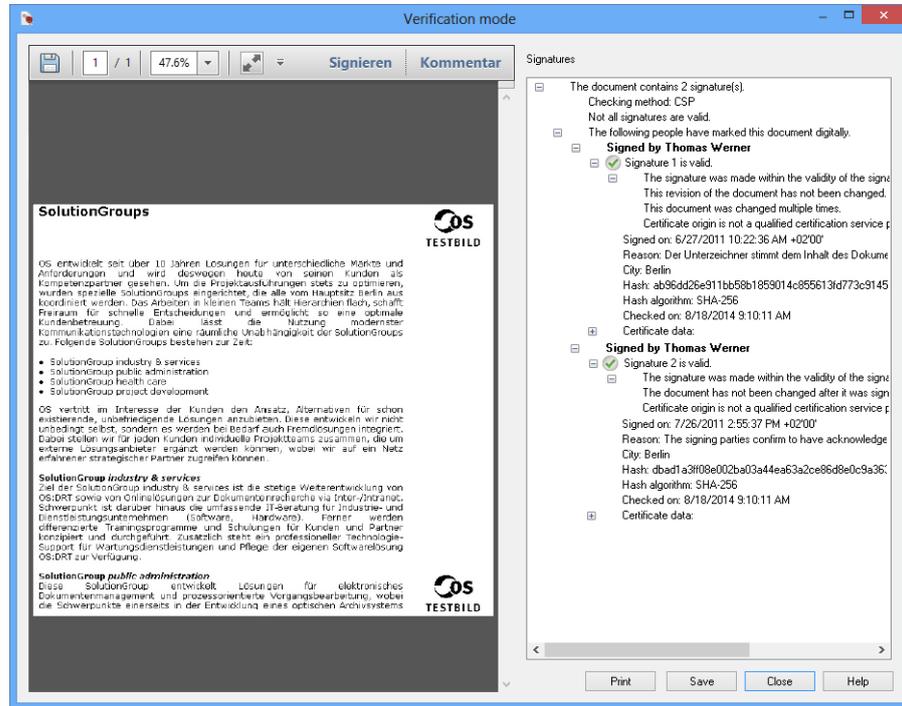
1. Select the document.
2. Click **Open > History** from the context menu or press the **F11** key.



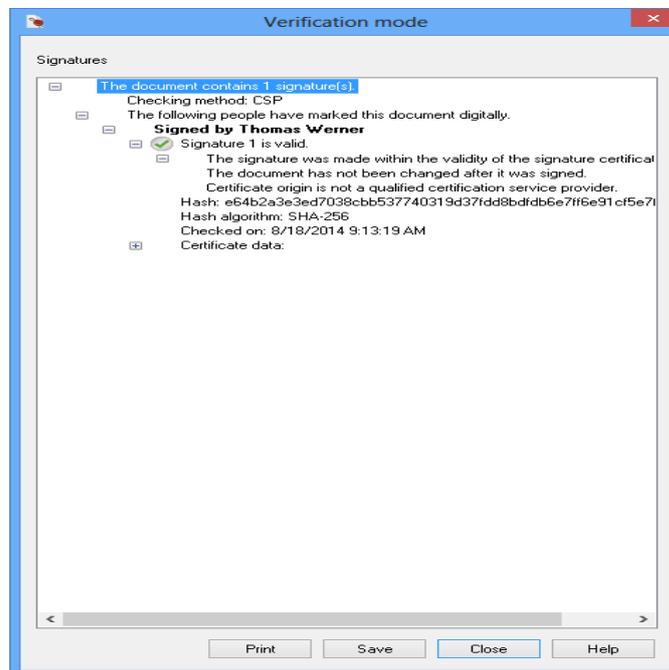
3. Select an action item **Electronic signature**.

4. Click the **View** button.

If the document is signed in PDF, a PDF version of the document is opened, along with the signature.



For other documents, only the external signature is opened:



5. Signatures can be printed or saved as XML files.

6. **Close** signature mode.

## Exporting Documents

The context menu in the folder window or hit list contains the feature **Export document files**. This allows you to export documents in the file format in which they are managed by enaio® into a directory which you can specify in a selection dialog. This is available for all documents with pages.

Documents, folders and registers can be copied to the clipboard. Outside of enaio®, copied contents can be pasted into other applications, such as the Windows Explorer. When copying documents, the following options are available:

§ Internal reference

Creates a new reference to a document. Use this reference to open the document in enaio® client.

§ Document

In a similar way to the **Export document files** function, the document will be copied to the clipboard without changing the file format.

For image documents consisting of multiple files, all files are copied to the clipboard.

§ PDF

The document is converted to PDF.

For folders and registers only internal references can be created for the clipboard.

It is also possible to drag and drop documents, folders, and registers in order to transfer them out of enaio®. The saved result depends on the type of object and the target location.

A link will be created at the target location when dragging and dropping folders or registers. As the Windows Explorer and Office programs support such links, these can be executed.

When dragging and dropping documents, the file format is transferred. The file is then inserted into the Windows Explorer or Office programs.

Other applications may only accept parts of the data or only save them as links to temporary filing areas.

Consequently, you always have to check the result after having dragged and dropped objects onto applications.

## Exporting Image Documents

When exporting image documents from the document display window, you can choose which images will be exported and in which file format.

When you open an image document in the document display window, you will see the **Export** function in the **IMAGE VIEW** ribbon tab and can use this to open the export dialog.

Here you can select which pages are saved from a document and whether the comments on the slides that you can edit yourself are saved with the file.

Annotations on layers which you are not allowed to edit will always be saved in the file.

Every selected page will be saved as a separate file.

### Exporting Pages from the Document Display Window

1. Open the image document in the document display window.
2. Select **Export** from the **IMAGE VIEW** ribbon tab.

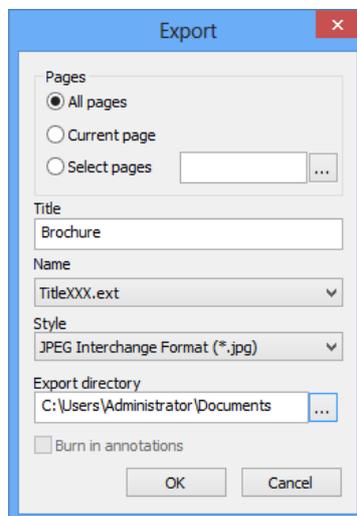
The export dialog opens.

3. Specify the pages to be exported and enter a title, naming scheme, a format, and an export directory (see 'Export' Window').
4. Confirm your entries with **OK**.

® The pages of the open document will be saved according to your specifications.

The **Export > Contents** function is available in the ribbon and context menu of a folder window or hit list. You can export all images from the selected document in the archive-native file format. This function is also available for W-Documents, video documents, and e-mails.

### 'Export' Window

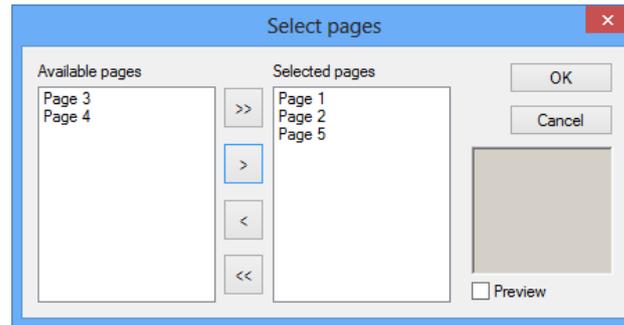


On the **Export** window, you make the export settings for the active document.

In the **Page** area select:

- § All pages
- § Current page
- § Select pages

With the button next to the text field, you can open the Select pages window for multiple page documents.



From the Available pages area, use the arrow keys to move pages into the Selected pages area. You can view a preview of the pages.

- § The page numbers, separated by a semicolon, can also be entered directly into the Set pages field.

Enter a name into the **Title** field. Since every page is exported individually as a file, choose a naming scheme and a scheme for numbering the files. The file names are derived from the name and the naming scheme.

In the **Naming scheme** field, select a scheme from the list:

- § Title.XXX

The entry in the Title field is used as the file name.

- § TitleXXX.ext

The entry in the title field is used as the file name, and consecutive numbering will be appended. The file extension comes from the Format field.

- § XXXTitle.ext

Consecutive numbering followed by the entry in the Title field will become the file name; the file extension is taken from the format field. The file extension comes from the Format field.

- § DOCID.XXX

Instead of the entry in the title field, the 'DOCID' is used as the file name, while the file extension will consist in consecutive numbering.

The DOCID is a hexadecimal number identifying each document in the database. The DOCID enables the administrator to retrieve a document from the database.

- § DOCIDXXX.ext

The DOCID, followed by consecutive numbering will become the file name. The file extension comes from the Format field.

In the **Format** field, select a file format from the list.

In the **Export directory** field, enter the directory you want the files to be saved in.

When you select the **Burn-in annotations** option, the annotations on editable layers will be saved with the files.

## Editing Image Documents

Pages of an archived document cannot be edited. The administrator may specify whether users can or cannot edit documents, depending on type.

Annotations of layers which you cannot remove become a fixed part of images after each change; they too can no longer be removed.

In image documents, you can only add or delete pages. Unlike in image editing programs, you cannot edit the individual pages themselves.

Follow the steps to edit an image document:

1. Select a document from the hit list, folder window, or filing tray.
2. Click **Contents > Edit** content in the ribbon or Contents in the context menu.

The module for editing images opens. You can scan new pages, delete pages, or select areas to be attached to the document as new pages (see 'Modules').

3. Click the **File** button on the **IMAGE EDITING** ribbon tab.

Ⓜ The document is saved with the changes. Your user name and the date of the change are saved in the properties (see 'Basic Parameter Queries').

While you are editing the document, it is marked with a  padlock and locked for editing. When you save the document, it will be automatically released again.

## Splitting Image Documents

Documents which are composed of more than one image can be partitioned.

Select an image document and locate the **Separate pages** function in the **FOLDER** or **HIT LIST** ribbon tab. This function lets you open the image document in batch-scan mode (see 'Batch Scan'). The assigned images are combined into a batch. As in batch-scan mode, you can add or separate images here too.

When you save a batch, select the desired document type and index the document. The location is always the same as the original document.

If you save all batches as new documents, the original document is moved to the trash.

Annotations of layers which you cannot remove become a fixed part of images; they too can no-longer be removed. Personal layers from other editors are lost.

## Comparing Image Documents

The **Image comparison** function allows you to put two image documents side by side in a window. For the image comparison an additional magnifier is available. The images can be tiled. Thereby differences are highlighted in color.

The image comparison is only possible if the images are of the same file format, resolution and color depth.

You compare image documents like this:

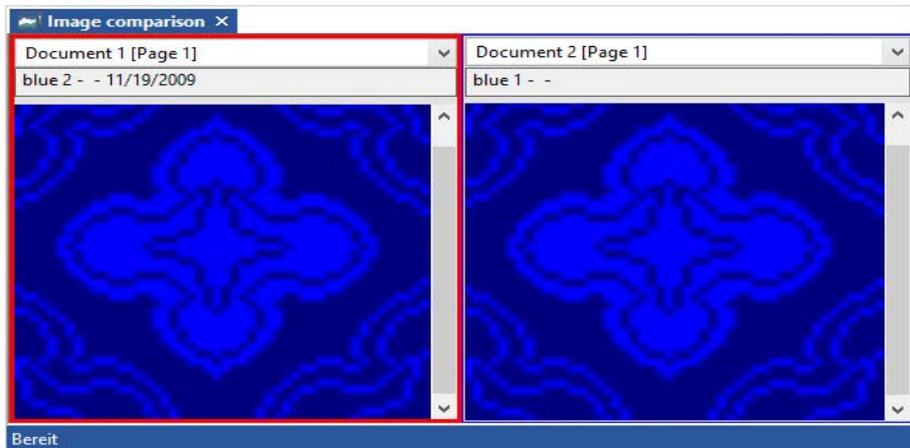
1. Select two image documents from a hit list, folder window, or filing tray.
2. Select the **More > Image comparison** function in the **HTTS, FOLDERS,** or **FILING** ribbon tab.

Ⓜ The images are opened in the **Image comparison** window.

Additionally you can open an image document in the **Image comparison** window and compare the pages or upload an externally administered image.

Uploaded images can be saved as image documents.

### The 'Image comparison' window



If you have chosen two image documents in the **Image comparison** window, the first page will be shown respectively left and right. If you have opened an image document the first and second page will be shown side by side. With the list above the images you can put any pages side by side.

The **IMAGE COMPARISON** ribbon tab contains the following buttons:

#### Image functions



File as new document

You file the selected image or document in enaio® client as a new archive document.

#### Compare



Image 1

Show/hide image 1 on the left page.



Image 2

Show/hide image 2 on the right page.



Comparison

Tile images 1 and 2. Thereby differences are highlighted in color. Thereby differences are highlighted in color.

## image



... with file

A file selection dialog can be opened to import one or several images for the image comparison.



Superimpose

When you have placed the images on top of each other, you can animate the view. The two images are displayed alternately in rapid succession. Small differences, which may not be clear even though they are marked in color, are made much more visible.

## Image



Rotate clockwise

Rotates the displayed document page through 90° clockwise.

Rotate  
counterclockwise

Rotates the displayed document page through 90° counterclockwise.

## Invert

## Zoom



Zoom in

Zooms into the view in the display window.



Zoom out

Zooms out of the view in the display window.



Window width

Adjusts the page view to the width of the display window.



Fit

Fits the document display into the display window.

## Selection



Zoom in

Activates zoom mode.



Move

This button activates the panning mode. Holding the mouse button pressed allows you to pan the document across the screen.



Magnifier

Select magnifying mode and click in the image while holding the mouse button. You can move the magnifying glass over the image with the mouse.

Both files that you have imported from the file system and documents that you have opened in the **Image comparison** window can be saved as new archive documents with the **File as new** document function.

Specify whether only the current page or all pages of the document should be saved as an archive document, then select an open or default folder as the target, enter the desired document types, and index the document.

## Windows Documents

### Display of W-Documents

Windows documents (W-Documents in enaio®) are opened for viewing and edited in the associated Windows application, both when you click **Open** and **Edit**.

The administrator can associate a viewer with a W-Document, so that users who do not have editing rights for the document can view it.

The administrator can configure the editor and the viewer as internal or external programs. External programs run independently of enaio® while internal programs will be integrated into the program window of enaio®.

No functions of the enaio® add-in can be run from W-applications which have been set up as internal applications.

### Check in/out

When you open a W-Document for display or editing, it will be marked in the archive. Other users will see a padlock icon with a  red cross, and can only open a write-protected copy of the document. You will see a yellow padlock  marking the document. After display or editing, you must check the document in so that other users can edit it. The yellow padlock disappears. A document can only be checked in from the workstation where it was checked out.

You cannot edit pages of archived W-documents. The administrator may specify whether users can or cannot edit documents of a certain type.

If you do not have the right to edit a W-document, it will open as a write-protected copy or in the configured viewer, and need not be checked in.

enaio® office-utilities provides functions which automatically check in W-Documents after they are closed.

### Export and print

If you want to export or print W-Documents, you can do so using the associated W-application. The **Export** function creates a copy in the specified directory; the **Print** function opens the W-Document in the W-application and then prints it on the default printer.

### Read-only mode

If you hold the **Shift** key while opening a W-DocumentWindows documents: write-protected, it will open as read-only and therefore does not need to be checked back in again afterwards. If you usually only want to view W-Documents, i.e. open them as read-only, you can set this in the **Options** window. The window can be opened from the **Options** item from the context menu of the document type in the **object search**.

### Editing W-Documents

1. Select a W-document from the hit list, folder window, or filing tray.
2. Open the document with the **Open** button on the ribbon tab or with **Contents** from the context menu.

The W-document will open in the associated W-program. Now you can edit it as you would any other document.

3. Save the W-Document with the provided name.
4. Switch to enaio® client.

The document is in the hit list, folder window, or filing tray, and will be marked with a  yellow padlock.

5. Open the context menu by right clicking.
6. Select **Check in**.

Ⓢ The document is checked in and other users can edit it. The yellow padlock in the display disappears.

If you are editing several W-Documents, you can check them all in with the ribbon tab or the **Check in** item on the context menu.

When you exit enaio® client, your documents will automatically be checked in.

If you have edited and saved a document without checking it in again, another user can only open a read-only version of the document.

### Discard saved changes

If you want to discard the saved changes to a document, you can do so, as long as you have not yet checked the document in and it has not been checked in automatically using an enaio® office-utilities function. Select **Discard changes** in the context menu or in the **HITS** or **FOLDERS** ribbon tab. The document is checked in, but the changes are not applied.

Some work items can be executed more easily with enaio® office-utilities.

### Variants of W-Documents

You can create different variants of W-documents, e.g. to document changes or to make changes that you don't yet want to make available to every user.

Variants of W-Documents are identified by the  variant icon in hit lists and folder windows.

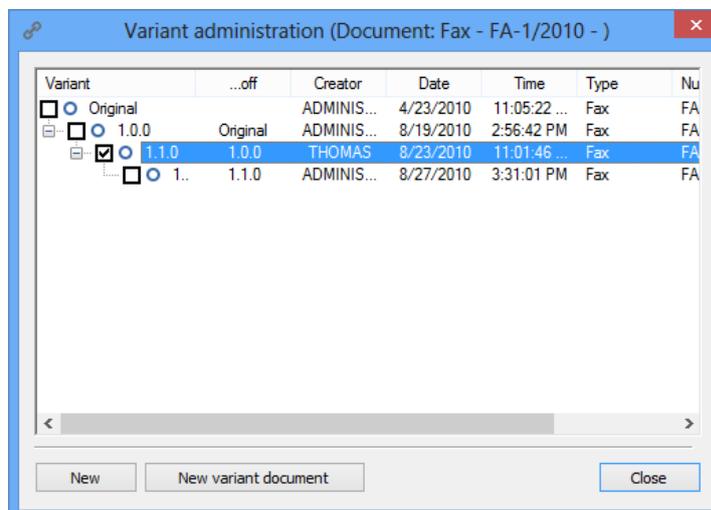
The variant administration is only accessible to users who are allowed to edit index data and documents of the specific document type.

The variant administration is only accessible to users who are allowed to edit index data and documents of the specific document type. Users with the system role 'Client: Always show variant administration' do not require these rights to open the variant administration. In this case, the variant administration is read-only, meaning that users cannot create new variants or assign the 'active variant' status to other variants. In this case, the variant administration is read-only, meaning that users cannot create new variants or assign the 'active variant' status to other variants.

### Variant administration

Open variant administration with the **Variants** item on the **OBJECT** ribbon tab or from the context menu of a W-Document. Variants can also be created while the original document is checked out.

In the **Variant administration** window, the available variants of a document are displayed in a tree structure. The topmost document, from which all variants are derived, is considered the original.



By clicking **New**, a new main variant may be derived from the original; a main variant may be used to create a new secondary variant, a secondary variant, in turn, to create a new sub-variant. The name of the variants is automatically administered through a consecutive number.

### New variant

When you click on the **New** button, a copy of the selected variant is created and opened in the configured editor. After the new variant is edited, it must be checked in. It will have the same indexing as its source document. The index data of each variant can be changed with the **Edit index data** function from the context menu.

## New variant document

The **New variant document** button opens a file selection dialog where you can select the W template from which you want to create a new variant document or where you can select an existing file to be inserted as a variant. The selected file will be inserted, checked out, and opened in the editor. It must be checked in after editing. If you drag a document, for example, from a Windows Explorer window onto a variant document in the **Variant administration** window, the new document will be inserted as a subordinate variant of the old document, and is given the next available variant number.

For W-Document types defined as module-spanning  document types, you can also create variants with the **New variant document** button or by dragging and dropping; the new variants can be assigned to a different module than the originals, for example image documents. enaio® client checks whether the intended file format can be assigned. If not, you will receive a corresponding error message.

## Active variant

A variant can be marked as  active variant. This active variant will be the one that is shown in and opened from the hit list or the folder contents.

Only the index data of the active variant are available for query.

Using the context menu, the archiving property can be modified, the document can be opened or sent, its history opened, and workflows started using variants.

## Archive documents as variants

You can set an existing archive document as a variant of another archive document.

If you drag a W-document onto another W-document while holding the right mouse button, the context menu opens. If you select **Create a new variant here**, the variant administration opens. Select the variant for which you want to create sub-variants and click the **Create in selected branch** button. The archive document will be stored as a variant and opened for editing. Then you will be asked whether you want to keep the original document.

## Deleting variants

In the **Variant administration** window, the available variants of a document are displayed in a tree structure. Select a variant and delete it using the context menu. If this variant has subordinate variants, these will also be deleted.

If you delete a document with variants from a hit list or folder window, you will be prompted to confirm the action:

- § If the active document is the original, all documents in the variant administration will be deleted.
- § If the active document is a variant, this variant and all subordinate variants will be deleted.

If you delete an active variant, the original will automatically become an active document.

The variant administration can be configured to have always all documents deleted in the variant administration independently of their activity status.

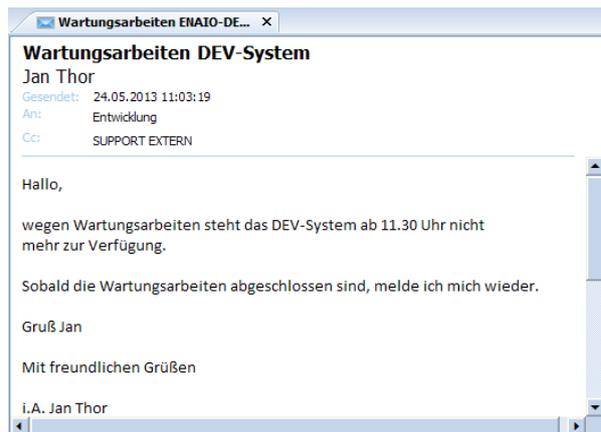
Documents deleted from the variant administration can only be retrieved as individual documents into the filing tray.

## Editing E-Mails

You can copy, display, reply to, and forward e-mails that you have copied from the inbox to IMA or EML format. You can open or save an e-mail attachment by double-clicking it. The e-mail index data can be edited.

Documents can also be sent as an e-mail attachment (see 'Sending Archive Objects as E-Mail Attachments').

Open e-mail messages, as with any other document, from the hit list or from a folder window, with the **Open** button or by double-clicking. The e-mail window will open.



The ribbon tab **E-mail** contains the following functions:

### Reply



Reply

You can reply to an e-mail. The sender's address will appear in the send-to field in your e-mail.



Reply to  
all

This function replies to the sender and to all other addresses to which the original message was sent.



Forward

You can forward a message. The text of the message will be transferred to the compose dialog of your e-mail application. You can then enter an address and forward the message.

You can copy e-mail messages (see 'Copying Documents') and create references of e-mails (see 'Assigning Multiple Locations to Objects').

E-mail attachments can be dragged and dropped from the e-mail window onto an open folder window if an associated W application is configured for them (see 'Windows Module').

Your administrator can integrate your default e-mail program for editing e-mails.

## Editing Video Documents

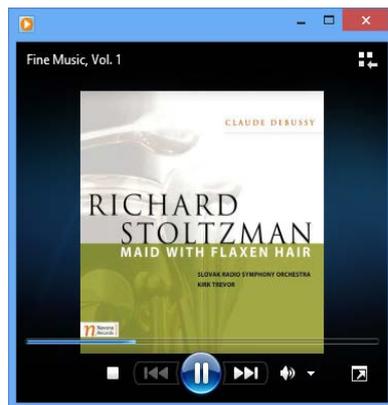
If you open a video document, it will be shown with the application which your computer system associates with the 'Video clip' file type.

Use Windows Media Player to choose different view options from the context menu.

You can allocate a video to a video document which has not yet been archived:

1. Select a video document from the hit list or folder window.
2. Select **Contents > Edit content** on the ribbon tab or the **Contents** function from the context menu.

The video module opens the video in the video clip application.



The **VIDEO** ribbon tab contains the following functions:

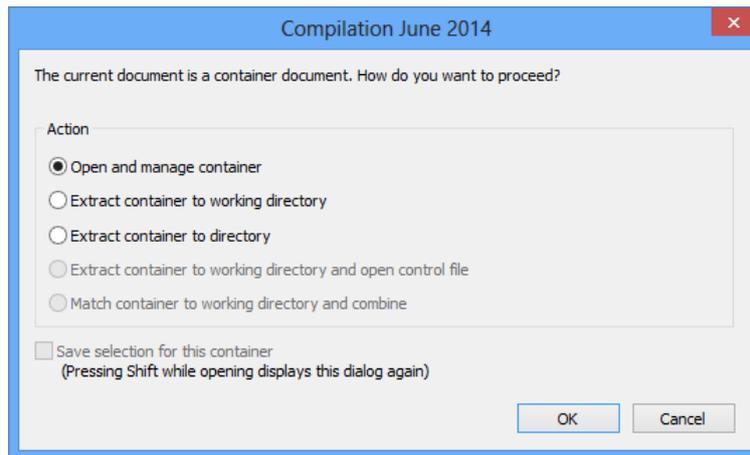
-  The **Import** button enables you to choose a video in AVI or MPG format from a file selection dialog.
-  Use the **Save** button to save the new video to the archive. The old video is overwritten.

You can only allocate videos to video documents.

## Editing Container Documents

As with W-Documents, you can use the options to specify whether container documents are opened read-only when you double click on them. They are opened for editing by default.

If you edit a container document, the action dialog is displayed. This dialog is also displayed when you open a container document. However, functions that can be used to change data are not available.



You can select these actions when opening or editing a container document:

§ Open and manage container

The container will open. You can change properties and add and delete files (see 'Container Module').

§ Extract container to working directory

The content of the container is extracted to the directory entered in the properties dialog.

§ Extract container to directory

The container content is extracted to a directory which you have chosen in a file-selection dialog.

§ Extract container to working directory and open control file

If a control file has been declared, this option extracts the content and passes the control file to the appropriate application.

§ Match container to working directory and combine

If the directory entered in the properties file contains files more current than those in the container, the newer files will be applied.

If you have unpacked data and the document is checked out, you have check it back in. In doing so, data may be matched, depending on the container's properties.

## Sending Archive Objects as E-Mail Attachments

You can send archive objects, folders, registers and documents as e-mail attachments. Documents can either be sent as links to internal recipients or as attached files. As a reference, the document can only be viewed if enaio® client is installed at the workstation. Folders and registers can only be sent as links.

For security reasons, sending a document as a reference from the user's own filing system is no longer supported. To be sent, documents must first be saved in the area to which the addressees have access.

Follow these steps to send archive objects as e-mail attachments:

1. Open a hit list or a folder window.
2. Select the archive object.
3.  Click the **E-mail** button and select one of the following options from the list:
  - Link**  
The selected archive objects are attached as links.
  - Contents**  
The selected objects are attached in their file format.
  - Content (ZIP)**  
The selected objects are compressed and the compressed ZIP file is attached.
  - Content (PDF)**  
The selected objects are attached as PDF files. If an object cannot be saved in PDF format, the original file is attached.
4. Enter a recipient and subject in the e-mail window.
5. Send the archive objects.

® The objects are sent as links or in the requested file format.

If enaio® client is installed on the workstation, the reference can be opened by double-clicking. If the **SHIFT** key is pressed and held until enaio® client is launched, the index data opens. You can then open the document from the context menu. If **CTRL+SHIFT** is pressed and held, the location is opened.

The recipient of an internal link has to own the appropriate authorization for the document type, in order to open the received document.

When sending an archive object, you can specify in the **Options** window whether to use the index data as an identifier for the file or for the reference. The window can be opened from the **Options** item from the context menu of the document type in the **object search**. If you select the option **Use indexing for external sending**, index data will be used to identify the document. The length is restricted to 100 characters. Character that the operating system identifies as invalid for file names will be removed. If a document contains more than one file, a counter will be appended, beginning with the second file. You can specify which entries are used in the **Fields > Send** area of the **Settings**.

The functions are also available from the context menu.

Use the **Clipboard** item to copy an internal reference to an object and, for documents, additionally the document itself in its original format or as PDF to the clipboard. From there, you can paste it into applications, e.g. an e-mail window.

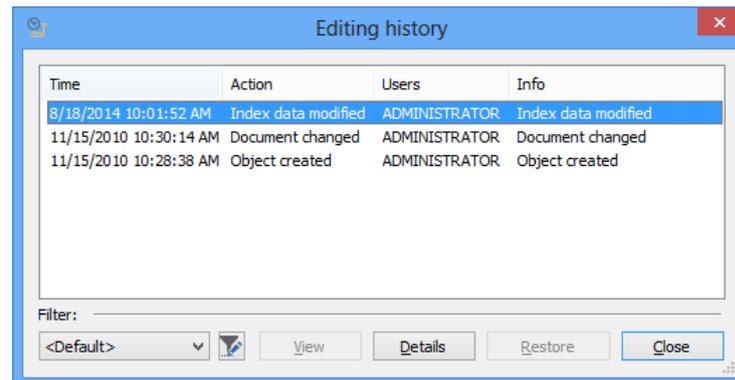
Archive objects can be placed in the **Favorites** portfolio and in the record of a workflow operation.

## History of Documents

As in the editing history of folders or registers, changes to the index data are logged in the history of a document. The administrator can individually configure for every document type, whether earlier versions of the index data can be restored (see 'History of Folders').

Certain actions are also logged, such as the signing of documents, the checking out and editing of documents, and the recognition of subscriptions.

The history of a document is opened with the **F11** key or from the context menu.



In addition to the index data versions of a document, the administrator can also save document versions. Then, old versions of documents can be viewed and restored.

If you select an entry in the history which has the status **Document changed**, you can open a read-only version of the document with the **View** button, which shows the document before it was edited.

With the **Restore** button, the earlier version of the document will become the current version. This document version will not be opened.

For annotations on layers, no versions are administered. Documents with annotations will always be opened with the annotations of the active version. Document versions of archived documents cannot be restored. Documents without type are not versioned.

The restoration and editing of old index data versions and the restoration of old document versions is also logged in the history.

If you select an entry in the editing history with the action **Electronic signature**, the **View** button lets you open the signed document version and verify the digital signature (see 'Signing Documents Electronically').

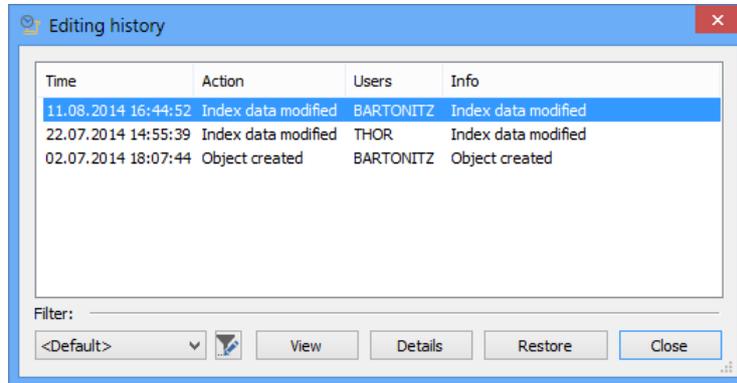
For the history you can define view filters (see 'History of Folders').

## Free Text Annotation for the History

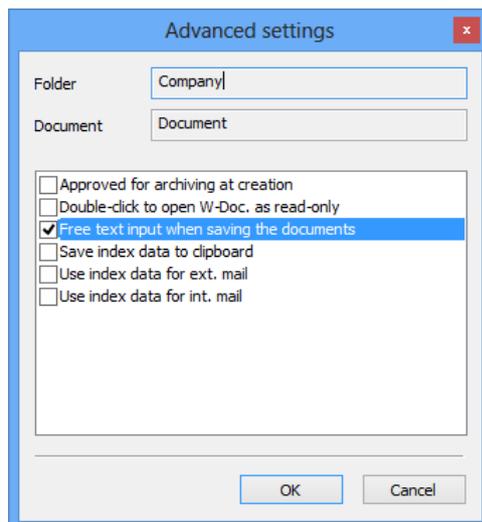
All actions which are performed on a document are logged in the history.

When checking in a document file, you can enter a free text annotation that is saved in the history and which can be viewed there.

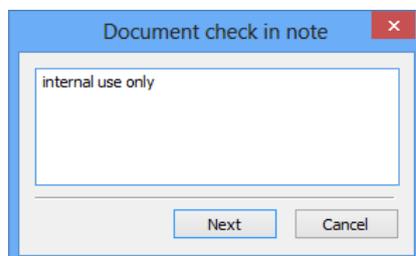
The action item for an annotation is called **User info**, the content can be found in the **Info** column.



When saving, the free text entry can be turned on for a document type under **Options**. The window can be opened from the **Options** item from the context menu of the document type in the object search.



If you select the option **Free text input when saving the document**, a text editor window will open when checking in a document of this type.



You can enter any text with a maximum of 248 characters. Formatting is not possible.

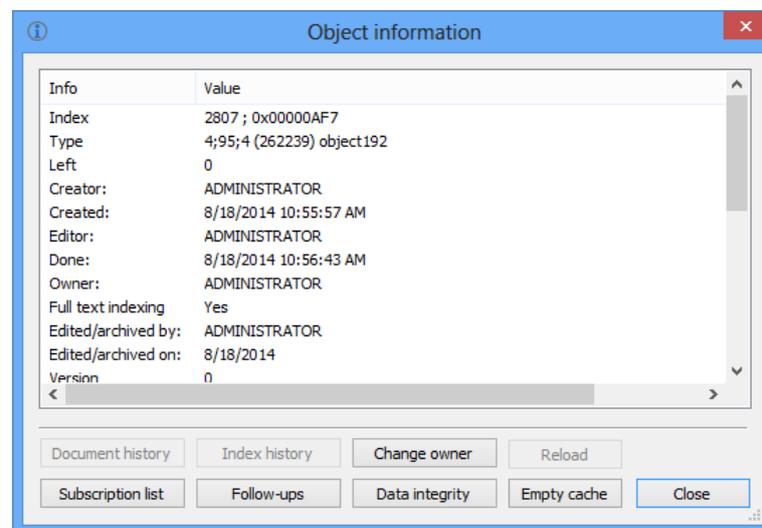
Click on **Next** to insert the text into the history. If you do not enter a text, no action entry for the history will be produced.

When document files are automatically saved and multiple document files are checked in, the free text dialog will not be shown.

## Document Properties

For every document properties can be viewed. The property contains data on the basic parameters and information which is useful for administrative tasks. From the context menu you can copy data from the property to the clipboard.

In order to access the properties, you need the appropriate system role. Access rights and system roles are assigned by your administrator.



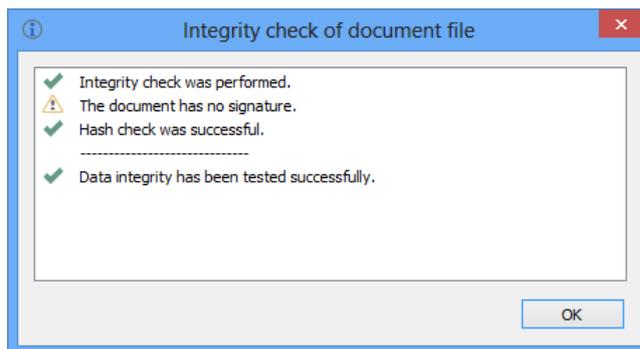
Users who are allowed to set up subscriptions for other users can use the **Subscription list** button to view a list of all users that have subscribed to the archive object.

Via the property, owners of an archive object and users with owner rights can change the object's owner.

The **Change owner** button will open a dialog with a list of all current users from where you can select a new owner.

The index history and document history can be configured to be enabled or disabled globally for the object type or for other objects of the object type. In the latter case, if you have the appropriate system role, you can enable or disable the index history using the **Index history** button for the object and the document history using the **Document history** button. Access rights and system roles are assigned by your administrator.

The **Data integrity** button allows you to check whether the current hash value of the document is the same as the hash value which was saved when changes were last made and if the document was signed by enaio® server, the function also checks whether it has a correct signature.



## Summarizing Locations and References

The function **Locations and links** shows an overview of all location relationships for a selected object. These include locations, references, and links. The Locations and references function can be used to summarize all objects which are linked to a specified object. This includes locations of documents, reference documents to documents and all objects linked with notes. This allows you to easily determine the context of an object.

Select an object, then go to the **HITS** or **OBJECT** ribbon tab and select the **Location > Locations and links** option, or use the **CTRL+SHIFT+F3** shortcut to show all objects that are linked to the selected object.

The linked objects will be displayed:

<b>Selected object</b>	<b>Linked objects</b>
Folders	Links
Registers	Links and location (folder or register)
Documents	Links, location (folders or registers), references to the document
Links	Links, location (folder or register), original document, references to the original document

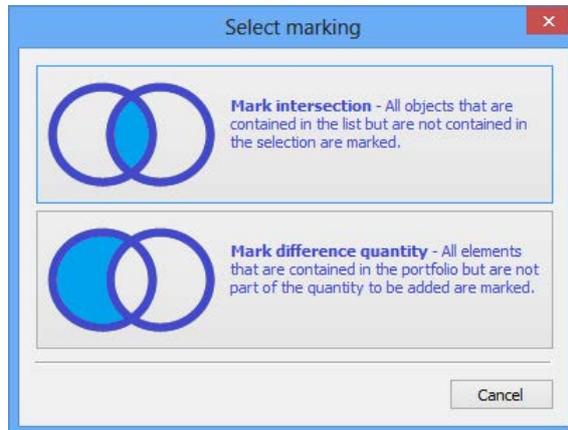
## Compare Lists – Intersections and Difference Quantities

You can compare the content of two lists: hit lists, folder content, and portfolio content. The comparison shows an intersection or difference quantity.

- § The intersection is the quantity of objects that are contained in both lists.
- § The difference quantity is the quantity of objects that are not contained in the source list but are contained in the target list.

To compare lists, drag the content of a list or a selection from a list onto another list while holding the right mouse button. From the context menu you can then select **Mark intersection** or **Mark difference quantity**. The corresponding objects in the target list will be selected.

If you drag objects onto a portfolio while holding **CTRL+Shift**, the dialog **Select marking** will be opened.



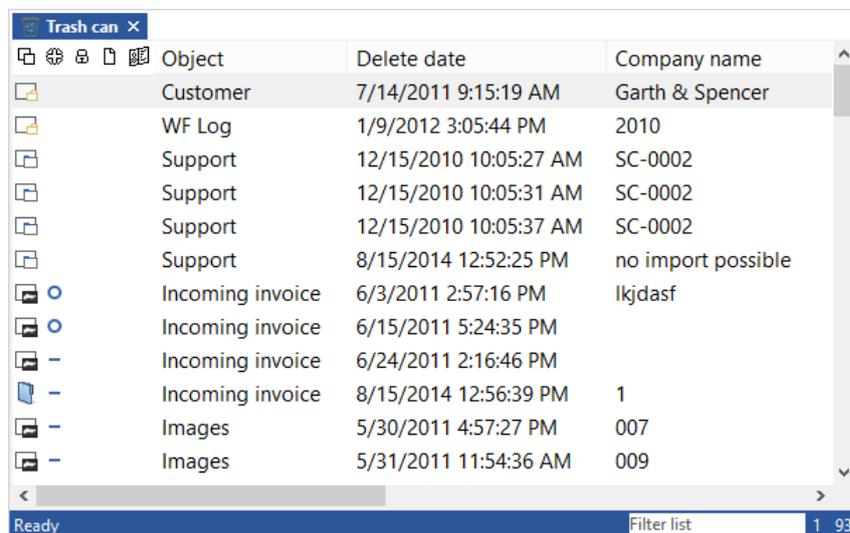
Click **Mark intersection** or **Mark difference quantity** to mark the corresponding objects in the target portfolio.

## Trash Can

Folders, registers, and documents which you delete are moved to your trash can.

Open the trash can from the **VIEW** tab.

To access the trash can you need the system role 'View personal trash can'. Access rights and system roles are assigned by your administrator.



You can execute these actions on archive objects in the trash can:

Open



The index data open as read-only.

Show index data

	The history is opened.
History	
	You open the property of the selected object.
Properties	
Trash Can	
	All objects from the trash are permanently deleted.
Clear	
	Updates the display after changes have been made.
Update	
	Cancels the update. The folders that were found up to that point are shown.
Cancel	
Benutzer: <input type="text" value="THOMAS"/>	Select the user whose trash can you want to view. This function is only available if you have the 'Client: View system trash can' system role.
Object	
	The object will be inserted at the original location. Folders and registers can only be individually recovered. You will be notified in case objects cannot be recovered, for example because the location does not exist any more.
Restore	
	An object in the trash can be deleted permanently. You always receive a security confirmation dialog. Folders and registers can only be deleted along with their entire content. You will receive a security confirmation dialog which informs you of this fact.
Delete permanently	

To delete something permanently in the trash can, you need to have the system role 'Delete objects from the trash can'. Access rights and system roles are assigned by your administrator.

Users with the 'View system trash can' system role see a list of users on the **TRASH CAN** ribbon tab that they can use to open the trash can of another user. The archive objects from the trash cans of other users can also be restored and deleted with the 'Delete objects from the trash can' system role.

Restoring objects can lead to inconsistencies in the archive system, for example, if new objects have the same index data in key fields as a deleted object. If this is the case, you will receive corresponding notification. Documents with no longer existing filing locations will be placed into the filing tray.

Documents from variant administration will be placed in the filing tray individually. The variant administration cannot be restored.

## enaio® search

The enaio® search component is an add-in for Microsoft Outlook. It enables you to access e-mails managed in enaio® directly from within Microsoft Outlook.

As optional components, enaio® search can also be integrated into workstations, on which enaio® client is not installed.

If enaio® search has been installed at your workstation, Microsoft Outlook will contain three additional areas:

### § Search pane

This area has two modes advanced search and full text search.

With the advanced search mode you can perform a search against specific e-mail data, with the full text search mode you can perform a search against specific data and content of all attachments. Both search modes can be used for all e-mail documents in enaio® or only a certain e-mail document type.

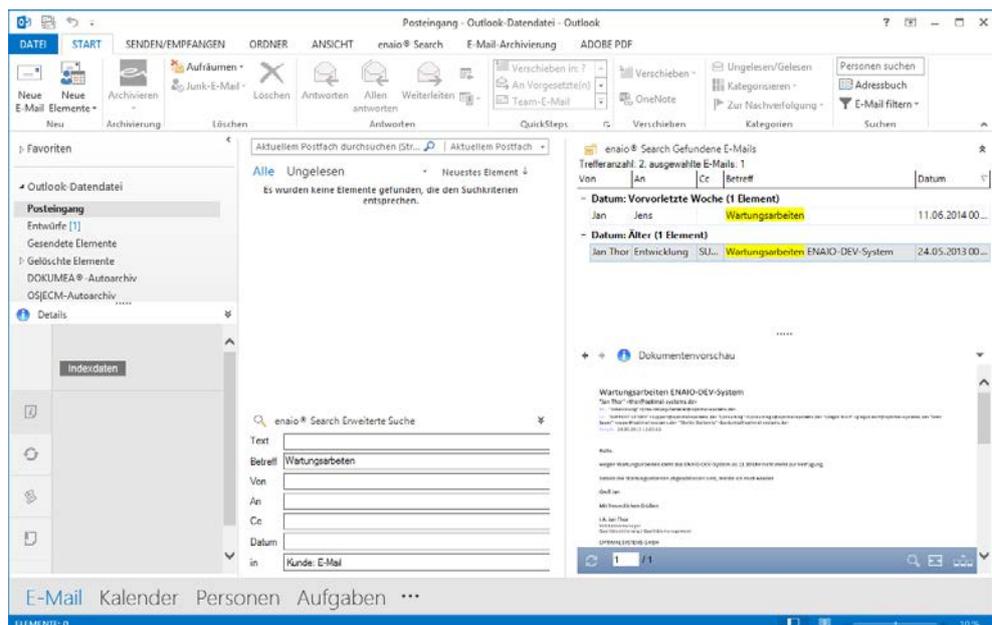
### § Found E-Mails

Search results are displayed here. The search terms are highlighted in color. The hit list can be sorted from column headers. Columns can be arranged using the mouse.

You can show or hide and sort fields by using the add-in options.

### § Details

If you select an e-mail from the hit list, the index data and basic parameters will be displayed here.



You can arrange the areas. If you drag an area with the mouse from its position, buttons for positioning will appear on which you can drag the area.

## Search Panes

Use the enaio® search search pane to search for e-mails which are managed in enaio®. This search pane is available next to the search pane provided by Microsoft Outlook for searching in the user's inbox.

The enaio® search pane has two modes: **Advanced search** and **Basic search**.

Switch between the two search modes using the arrow button on the right side of the first search field.

Use the add-in options to configure whether a placeholder for any number of any character is added when executing a search.

## Advanced Search

Using the advanced search, enter the search criteria into the corresponding fields of the search form. During the search, entries in one field and entries in several fields will be linked by the logical operator **AND**.

The screenshot shows the 'enaio® Search' interface with the 'Erweiterte Suche' (Advanced Search) mode selected. The search criteria are as follows:

- Text:** (Empty)
- Betreff:** Wartungsarbeiten
- Von:** (Empty)
- An:** (Empty)
- Cc:** (Empty)
- Datum:** (Dropdown menu)
- in:** Kunde: E-Mail

You can choose a date or a time period using the assigned list or enter the date with these formats:

2010.12.31

2010.01.01-2010.03.15

If you select **Interpolation search** from the list, the fields **From** and **to** will be enabled, in which you can enter a date or select it from the calendar. If you leave a field blank, the search will not be restricted.

If you do not want to search through all e-mails, you can narrow down the search to a certain document type in the **In** field. The list for the **In** field contains all e-mail document types used in enaio®. By integrating further components with the mailboxes you can further narrow down the search.

Start the search with the ENTER key or by clicking the magnifying glass icon.

A hit list is shown in the **Found e-mails** area. The number of hits is displayed on top of the list. Search terms are highlighted in the hit list. To open e-mails from the hit list, double click them.

The number of hits is restricted by the administrator, if the number is above the limit, you will receive a message. By clicking the message, you can nevertheless display all hits. However, this might take some time.

## Full Text Search

Using **full text search** allows you to perform a search through all data of the e-mails in enaio® including the content of attachments in text format.



Possibilities for combining search criteria depend on the full text server (see 'Full Text Searches – Combinations and Placeholders').

In the **In** field you can narrow down the search to one e-mail document type.

You can restrict the search criteria to specific data.

**Example:** `from:Smith` searches only in the 'From' field of e-mails for the entry 'Smith.'

The following restrictions to specific data are possible:

- Text:** Searches only in the 'Text' field
- Subject:** Searches only in the 'Subject' field
- From:** Searches only in the 'From' field
- To:** Searches only in the 'To' field
- Cc:** Searches only in the 'Cc' field

Search criteria with restrictions to specific data can be combined. They are linked with the logical **OR** operator.

**Example:** `from:Smith to:Peterson`

Start the search with the ENTER key or by clicking the magnifying glass icon.

A hit list is shown in the **Found e-mails** area. To open e-mails from the hit list, double click them.

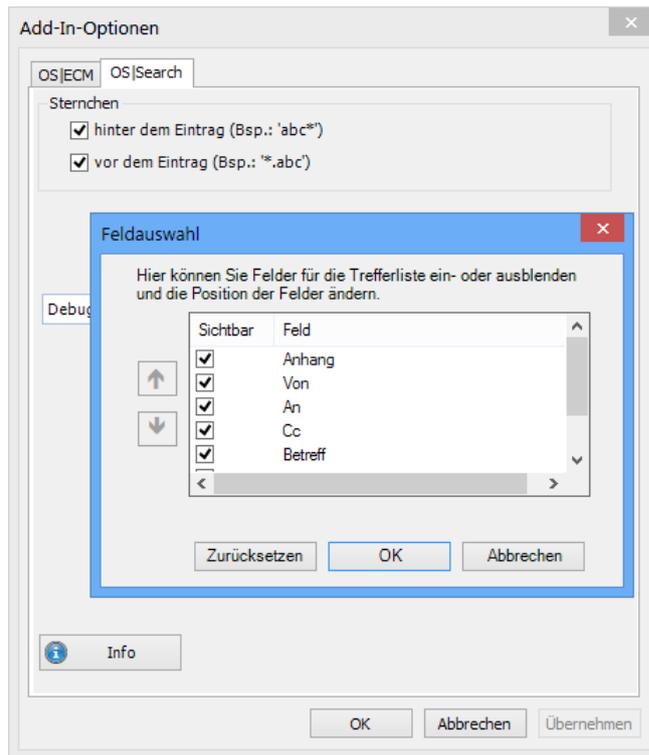
If full text search has not been included or enabled in enaio®, only a standard search limited to the index data is offered.

## Found E-Mails

Hits are listed in the **Found e-mails** area. Search terms are highlighted in the hit list. When you select an e-mail, a preview of the e-mail is displayed.

enaio® search saves the display settings for the document preview. If you collapse the area, it remains collapsed until you expand it again.

You can show/hide and sort fields in the hit list by using the add-in options.



To open e-mails from the hit list, double click them.

The context menu of selected e-mails contains the following functions:

- § Open e-mail
- § Restore e-mails with attachments that have been replaced with links for viewing
- § open location

As in Microsoft Outlook, you can click on the column headers to sort the hits.

The number of hits is restricted by the administrator, if the number is above the limit, you will receive a message. By clicking the message, you can nevertheless display all hits. However, this might take some time.

Select an e-mail from the list to show the index data in the **Details** area. Double-click to open an e-mail.

E-mails can be edited when transferred to enaio®. You can configure the transfer in such a way that attachments of e-mails are transferred as separate files and a reference is added to the e-mail itself. Use the context menu of an e-mail in the **Found e-mails** area to restore e-mail texts in the original format or restore e-mails and their attachments in the original format and show them.

If you drag an e-mail from the hit list, for example, to an Outlook folder, it will be restored and saved there. Attachments are not managed in the form of references, but with the e-mail.

If you drag a large number of e-mails from Microsoft Outlook to target location, a progress bar will be displayed even before you reach the target. However, e-mails will only be copied to the target location when dropping them there.

## Details

The **Details** area is displayed if you select an e-mail in the **Found e-mails** area. The index data and basic parameters of the e-mail are shown here.

enaio® search saves the display settings for this area. If you collapse the area, it remains collapsed until you expand it again.

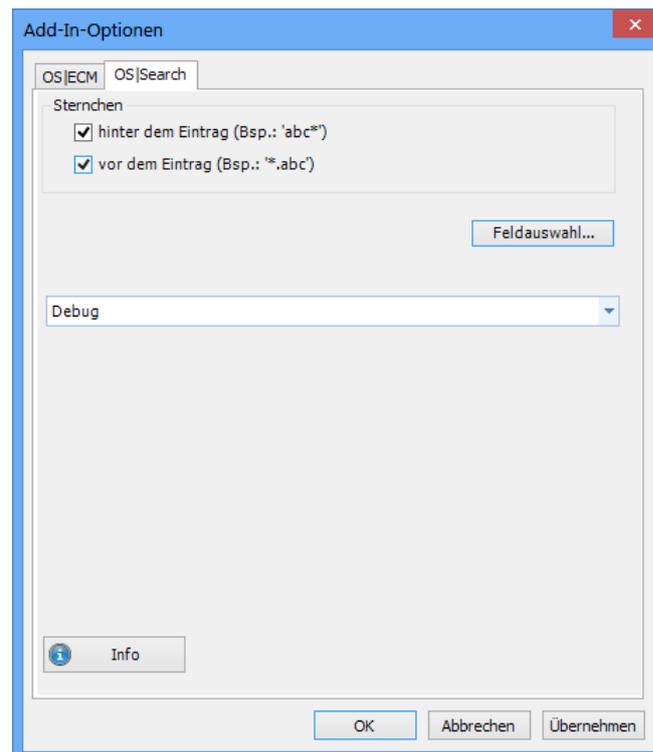
Depending on the configuration, the **Message** field may only contain a part of the message. Usually, this field is limited to about 2000 characters.

You can view the complete message text in the reading pane or open the e-mail by double-clicking it.

You can view the original e-mail if you show it using the appropriate context menu function in the **Found e-mails** area.

## Add-in Options

By using the add-in options of enaio® search, you can configure the placeholder feature for the search, select and arrange the fields for the hit list, and set the log level.



In Microsoft Outlook, select **File > Options > Add-ins > Add-in Options** to open the dialog.

# Working with Workflows

## Workflow – Introduction

With the workflow feature, you can create process-oriented data and documents with the help of previously-specified workflow models.

A workflow model defines:

- § which users can initialize the modeled workflow,
- § which activity follows a given activity,
- § what an activity consists of,
- § which users execute an activity as a work item,
- § which data and documents are forwarded from one work item to the next,
- § which deadlines have to be met,
- § how a workflow is completed.

Workflows are managed from inboxes.

There is an inbox for startable workflows and inboxes for work items of running workflows which have been assigned to you; the inboxes contain information about running processes and their work items.

Data within a workflow are created using workflow forms. An individual workflow form can be assigned to each work item. As on index data forms, workflow forms contain various fields, into which you can type data.

A record can belong to a workflow. This record manages all documents which are assigned to the active work item or which you have created or edited in the work item.

Once you have completed a work item, you can forward the data. The users to whom the next work item was assigned will find the work item in one of their inboxes and can start it. For work items of an ad-hoc activity, users can specify the persons who will be responsible for the next activities.

As a workflow participant, you have a workflow role assigned to you regardless of your group. The role defines which workflows can be initialized by you and which work items you can execute. As soon as you start a work item, it is personalized. Other users with the same role will no longer see the work item. If you change your mind and decide not to execute (all) the work item(s), you can remove the personalization. The work item can then be executed or completed by other users with the same workflow role. Some work items can be executed by more than one user simultaneously, e.g. polls.

To make sure that a workflow is completed when you are absent, you can report your absence. Users with the same workflow role can then complete your personalized work items. If no other user has the same role or all users with the same role are absent, the workflow model will assign substitutes. A substitute can execute and complete all your work items and all other workflows and work items for which no user with the same role as yours is present.

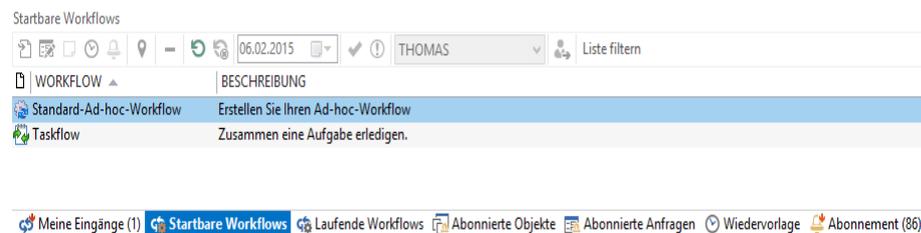
Users with the system role 'Set up substitution' can name their own substitutes under the settings in the 'Inboxes' area. Access rights and system roles are assigned by your administrator. Entering a substitute oneself writes over all administratively configured substitutes. If the organizational model is changed, however, all administratively configured substitutes are entered again.

## The Workflow Inboxes

Workflows and work items are managed via your inboxes.

Open the **Inboxes** window from the **VIEW** ribbon tab.

You can choose the inboxes you need under **Settings > Inboxes**.



The following inboxes are available:

### § Startable workflows

All  workflows which you can start are listed here.

Workflows and their work items may be indicated by a customized icon.

### § Running workflows

Of all workflows which you have started, the current work item is listed here.

Work items with a closure period are marked with a clock icon.

### § Substitution

All workflows and active work items of users you are substituting are listed here.

### § Workflow Inboxes

All active work items which you can execute, as well as all personalized  work items which you are currently executing, are listed in the central inbox My incoming messages or, depending on your settings, in workflow-specific inboxes.

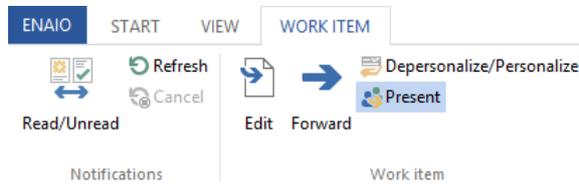
§ Inboxes with unprocessed entries are highlighted red on the register.  
 Work items with expired due dates are identified by a  red exclamation point.

In the context menu, you can update the display and report your absence or renewed presence.

## Absence and Substitution

In order to start workflows, execute work items, and have your personalized work items completed when you are absent, you must report your absence. If there are users with the same role as yours, they can start workflows and run work items.

When you click on an inbox, the **WORK ITEM** ribbon tab opens. Here you will see the **Present** option. If this is blue, you are registered as present in the system.

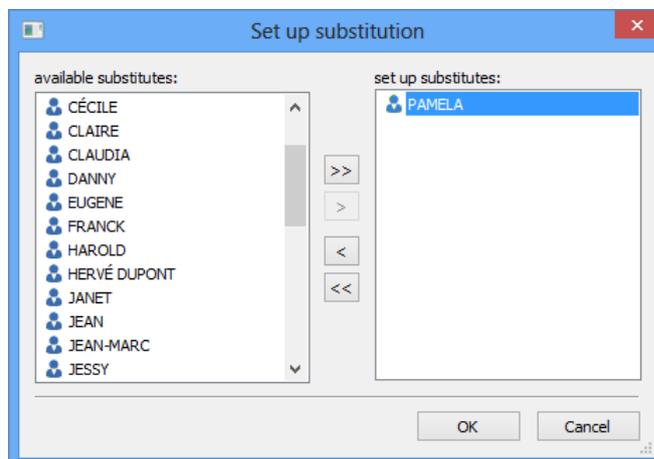


Clicking the button sets your presence state to absent. This removes the blue from the option in the ribbon.

Alternatively, you can change your presence state in the **ENAIO** ribbon tab (see 'ENAIO Tab').

If there is no user present with a role that enables them to start workflows or execute work items, you require a substitute . This substitute can then execute and complete all your work items and all other workflows and work items for which no user with the same role as yours is present.

Substitutes can be set up by the administrator. You can set up substitutes in the **Settings > Inboxes** area. You can configure your inboxes and open the **Set up substitution** dialog.



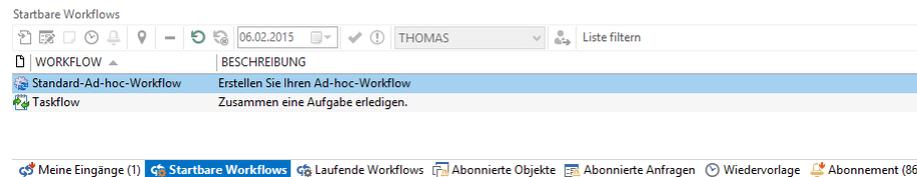
All users which are part of the workflow organization are available.

Representatives can also open and edit reminders of absent users.

If you are reported as absent, you will be automatically asked whether to report your presence when starting enaio® client for the next time.

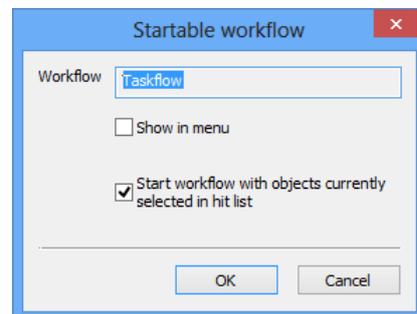
## Starting Workflows

The inbox labeled **Startable workflows** lists all workflows which can be started by you and all other users who have the same role.



Workflow steps can be started by double-clicking, from the context menu, or by dragging archive objects onto the workflow. This option is also available in the variant administration for active and inactive variants of an archive object. The archive object will then be added to the workflow file. Whether this is possible or even necessary is defined by the workflow model.

When you select a startable workflow, you can create a link on the desktop of the archive with the **Add to desktop** context menu item:



You can choose whether to create an additional link in the ribbon and whether to transfer the currently selected objects to the workflow file at workflow start using a link.

Workflows can be configured so that they are started when data from an e-mail message in Microsoft Outlook is stored.

On the **Startable workflows** tab, workflows may be listed which can be started with enaio® client, but which are set up to be started from enaio® capture.

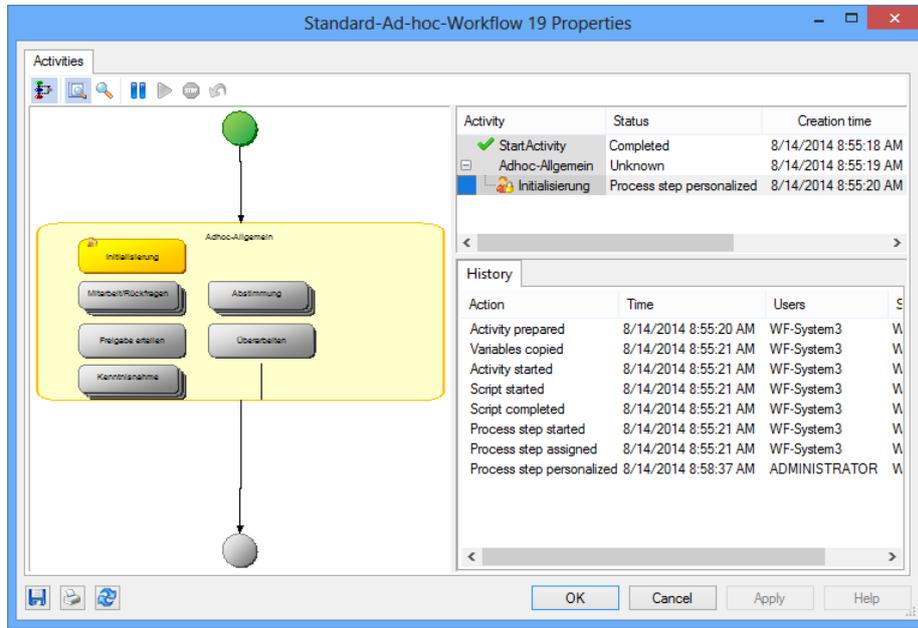
Starting a workflow causes the first work item to appear in the inbox of every user who has the appropriate role.

If you have started a workflow, the process can be configured so that the first work item is opened right away, if you are allowed to execute it.

The current work item of the workflow is shown on the **Running workflows** tab. There, you can see which users have received the work item in their inbox and show the record content.

If you have the appropriate system roles, you can assign one or multiple work items to other users and remove personalization.

You can also access **process details**:

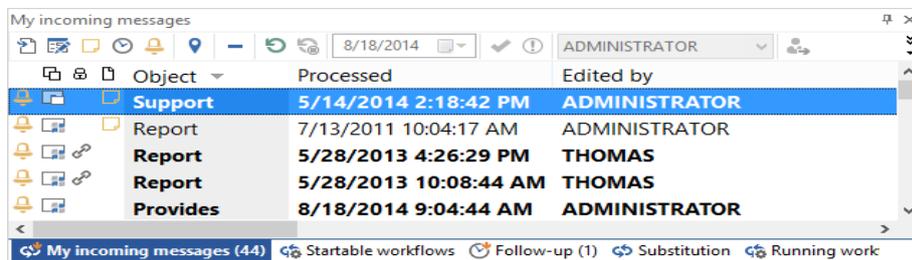


In this dialog, users with appropriate system roles can abort workflows and stop or resume work items. Access rights and system roles are assigned by your administrator.

The activity lists can also be saved as files and printed.

## Starting Work Items

You can find the work items that you can execute in the **My incoming messages** window or in the inboxes which you have set up (see 'Inboxes' Area').



You will find the following information on the tabs:

- § active work items which you can execute,
- § personalized  work items which you have started but not yet completed,

§ work items  personalized by others but assigned to you because a dunning period has expired.

Work items whose dunning period has expired are marked by a  red exclamation mark.

A work item can be started by double-clicking, from the context menu, or by dragging archive objects onto the workflow. The archive object will then be added to the workflow file. Whether this is possible or even necessary is defined by the workflow model.

To start work items which have been personalized by another user, from the context menu first remove the personalization.

You can select multiple work items and start them by selecting **Edit** from the context menu. The work items are opened one after the other.

When you start a work item, the step becomes personalized and the workflow window opens.

The workflow window contains the workflow form and a record. Within a workflow, objects can be created via the record, or existing objects inserted or added for information. Work items of an ad hoc activity also have a circulation slip register. There, you can specify the follow-up actions.

The window may also contain a log tab full of information.

An individual workflow form and a separate record can be assigned to each individual work item.

You can cancel a work item using the **Close** button on the workflow form. You will be given the chance to decide whether you want the changes to be saved in the workflow form. If you cancel a work item, it will still be personalized and can only be accessed by you. If you report yourself as absent, though, other users will be able to execute the process step.

**Reset** on the **WORK ITEM** ribbon tab discards all changes that you have made in the fields of the workflow form. The workflow form remains open after it has been reset.

If you select **Cancel** from the context menu, changes in the workflow form are not saved and the personalization is removed.

All changes to archive objects in the record will be saved immediately and cannot be undone by canceling the work item.

## Workflow form

Every work item has a workflow form. Every step in a workflow can have its own form associated with it, or all steps can be carried out using the same form.

A workflow form is equivalent to an index data form (see "Index Data Forms"). Various fields can be found on it. Field entries may be limited or predefined. Fields

can be indexed using catalogs or add-ons. The form offers buttons to execute scripts, create data or start process steps that create data.

Bestellvorgang 62 ×

Bestellung aufnehmen | Akte

Artikel

Kategorie

Wert  
0,00

genehmigt Abteilungsleiter  
 genehmigt Geschäftsführer

Bemerkung

Teilnehmer: Prozessersteller

Forward Close

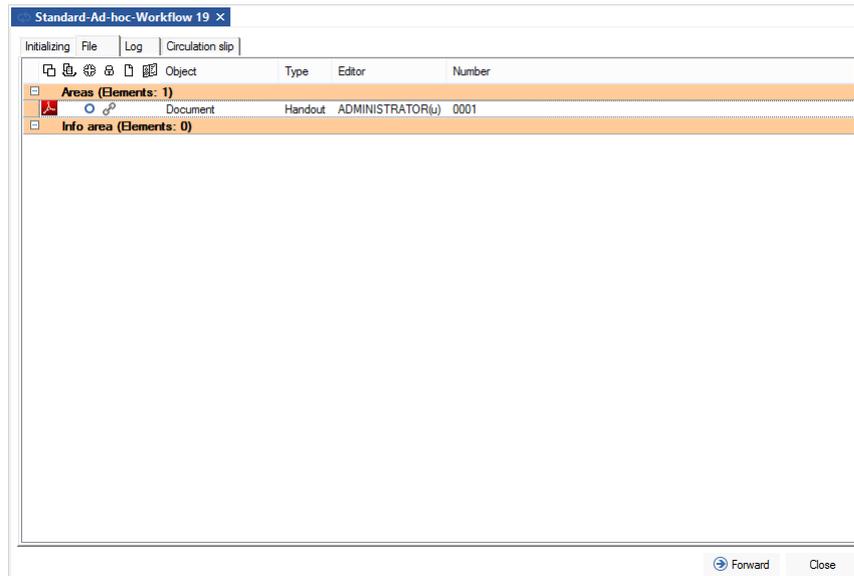
You will find detailed information on workflows and work items in which you are participating at your workstation.

Unlike on index data forms, leading and following space characters as well as line breaks are always removed when inserting data into the text boxes of workflow forms.

## File

A record is assigned to a work item. Within a workflow, objects can be created via the record, or existing objects inserted or added for information.

When you start a work item, the workflow window will contain a **Record** tab with the content of the record.



The record has an **area** for archive objects that are edited and an **info area** for archive objects that can be attached for information. The workflow model defines whether and how archive objects can be edited and which archive objects can be added to a given area.

Insert objects into the file by dragging them to the workspace or info area. In the same way, you can drag objects to the file from the file system or from your e-mail program.

As they would be in a hit list, archive objects in the file are identified by a type-specific icon, while documents are additionally marked with archiving and status icons. In the property of an archive object, you can view the workflow processes of an archive object regardless of the record in which it is located.

Documents and registers which do not yet have a location in the archive are found in the workflow tray and are marked with a special flag. Every user who is allowed to view the workflow file has access to these documents and registers from the workflow tray.

If you want to assign a location to these archive objects, use the mouse to drag the document to an open folder or register window. As soon as archive objects from the workflow file are given a location in the archive, only users which have the necessary rights may view these objects.

If a document has **no type**, assign it a type from the context menu using the **Index data** function, and index the document with the type-specific index data form. It is then possible to specify the location.

All changes to archive objects in the record will be saved immediately and cannot be undone by canceling the work item.

The workflow model defines whether and how archive objects can be edited and which archive objects can be created in or added to a given area.

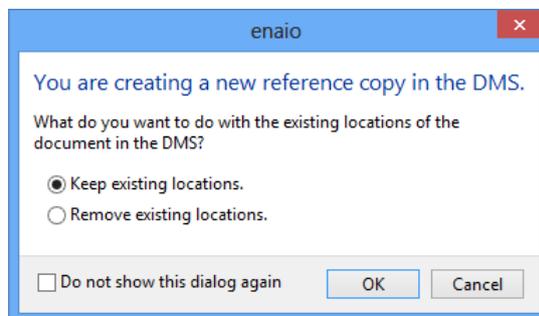
Editing features are accessed via the ribbon and context menu, just as they are in hit lists and folder windows.

On the **FILE** tab, you will find the same features for editing business objects as on the menu tabs of hit lists and folders (see 'Folder Hit List').

With the mouse, you can drag archive objects from hit lists, folders, and your tray onto the work area or the info area. The archive object will be added to the workflow file. You can also use the mouse to move archive objects within the workflow file, from one area to another.

Archive objects without type cannot be inserted into the workflow file from the filing tray. Archive objects with type are always moved from the filing tray to the record.

If you drag an archive object from the record into a folder or register, you can assign a different location to the document. The document retains the document type and the content data. You can specify whether the remaining locations are retained or deleted. If the other locations are retained, the document has several locations in future.



You can define a default setting for this action and deactivate the dialog. It is possible to reactivate the dialog in your settings (see "Confirmation' Area').

## Circulation Slip

Only work items of an ad hoc activity have the **Circulation slip** tab.

For these work items, potential follow-up activities are defined in the workflow model. Which follow-up activities are executed in which order is defined on the **Circulation slip** tab.

To do so, the user of the first step of an ad hoc activity selects one or more follow-up actions. The user specifies which users are allowed to execute the activities, and he also defines whether or not to modify single process steps or to edit the entire circulation slip.

Activity	Task	Participant	Escalation	Due on	at	Comment
<b>1. Abstimmung</b>						
Abstimmung	Abstimmung		<no escalation>			<input checked="" type="checkbox"/> <input type="checkbox"/>
<b>2. Protokoll</b>						
Protokoll	Protokoll		Automatische ...	8/20/2014	12:56:02..	<input checked="" type="checkbox"/> <input type="checkbox"/>
<b>3. Kenntnisnahme</b>						
Kenntnisnahme	Kenntnisnahme		<no escalation>			<input checked="" type="checkbox"/> <input type="checkbox"/>

### Activities

A circulation slip consists of a sequence of activities which are set up in the workflow model. Activities can be grouped. If all activities of a group are completed, all activities of the next group become ready for editing.

Activities have multiple properties. You can specify if the properties can be modified by the users and if activities can be deleted from the circulation slip. You can specify for the circulation slip itself if it can be extended, i.e. extended with additional activities.

Create activities with the **Add activity** context menu item.

Then a new group is created with the standard activity.

Activity	Task	Participant	Escalation	Due on	at	Comment
<b>1. Initialisierung</b>						
Initialisierung	Initialisierung		Mahnmail	8/20/2014	12:59:57...	<input type="checkbox"/> <input type="checkbox"/>

If you select the standard activity you can select an activity from the corresponding list of available activities. The activity name is used as the name of the group. Optionally you can enter information for the user in the **Task** and **Comment** columns.

The **Users** column contains a list of all workflow users. You can select one or multiple users.

If dunning periods are configured for ad hoc activities in the workflow model, you can select a dunning period in the **Escalation** column. The corresponding data are entered into the **Due on** and **at** columns.

If you select the **Edit** column, a user can edit this circulation slip entry. If you select the **Delete** column, a user can delete this entry.

With the context menu item **Circulation slip extendable** you can specify whether or not new activities can be added to the circulation slip.

Delete selected activities with the **Delete selection** context menu item.

An activity is automatically created in its own group. Using the arrow buttons at the top of the workflow form, move an activity up or down to a different group. Empty groups are removed automatically. You can create new groups from the **Begin group** item in the context menu.

### Managing circulation slips

A circulation slip can be saved as a circulation slip template. Circulation slip templates are user-specific configurations that are published in the **Circulation slip template** area of the settings, making them available to all users.

Save the circulation slip as a circulation slip template and load circulation slip templates using the context menu of the tab.

If you have added activities and loaded a circulation slip template, activities are attached from the circulation slip template.

## Forwarding Work Items

Once you have completed all individual steps belonging to a work item, you forward the work item.

The **Forward** button on the workflow form or on the **WORK ITEM** ribbon tab saves the data and forwards it to the next work item. The workflow model defines which users can carry out the next work item. If you can carry out the following work item yourself, the workflow can be configured to go on to the next step immediately, in which case the following workflow form opens right away. You may be required to confirm the forwarding by entering your password.

On the workflow form, you can use the workflow recipient add-on to indicate other users and roles that can execute a subsequent work item.

The **Close** button on the workflow form cancels a work item. You can decide whether you want the changes to be saved or not. When you close the work item, it remains personalized and can only be accessed by you. If you report yourself as absent, though, other users will be able to execute the process step.

**Reset** on the **WORK ITEM** ribbon tab discards all changes that you have made in the fields of the workflow form. The workflow form remains open after it has been reset.

If you select **Cancel** from the context menu, changes are not saved and the personalization is removed.

If not all individual work items for the work item have been completed, you will receive an error message with information about the work items which remain to be done.

Work items can also be forwarded directly from an inbox with the context menu, without having worked on them. Multiple work items can then be selected and forwarded.

## Starting Workflows from Outlook

Workflows can be started from Microsoft Outlook with the transfer of e-mail data.



If this function is set up, the **Workflow** button is included on the **E-mail archiving** ribbon tab in Microsoft Outlook. When clicked, it opens an Workflow assignment dialog.

A configuration defines:

§ which startable workflows can be started from Microsoft Outlook,

§ which data from an e-mail will be transferred to the first work item.

If you select an e-mail in Microsoft Outlook and then click the **Workflow** button, an assignment dialog will open.

Startbarer Vorgang	Beschreibung
Standard-Ad-hoc-Workflow	Erstellen Sie Ihren Ad-hoc-Workflow
Taskflow	Zusammen eine Aufgabe erledigen.

Workflowvariable	Typ	Wert
sAntragsteller	MS Outlook-Feld	To (Thomas Werner)
sBem-Hist	MS Outlook-Feld	(AW: Taskflow)
sBetreff	MS Outlook-Feld	Subject (AW: Taskflow)

Feld    To     Alle Variablen anzeigen  
 Freitext  
 Liste

Dokument
<input checked="" type="checkbox"/> E-Mail

Ausführen    Abbrechen

All workflows which can be started from Microsoft Outlook are presented in a list.

In the **Variables** area, the variables of the first work item of the selected workflow are listed and can be populated with data. In the configuration, variables can be assigned to a Microsoft Outlook field or a value.

Variables are assigned to the fields on the workflow form. Field names and variable names can, but do not have to be the same.

The **Documents** area lists documents that can be inserted into the workflow file. Depending on the configuration, these may be e-mail attachments and/or the e-mail message itself.

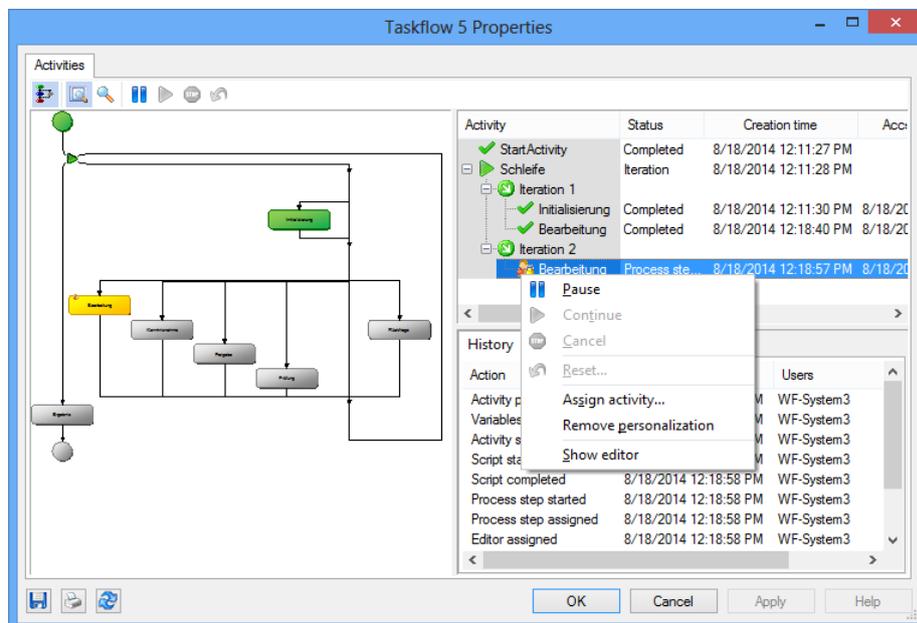
To start a workflow, select it and then press the **Execute** button.

## Workflow – Process Administration

Current processes are managed with enaio® administrator-for-workflow.

Users who have the system role 'Client: Workflow process administration' can control running processes, to a limited extent, from enaio® client. Access rights and system roles are assigned by your administrator.

Among the inboxes, the **Running workflows** inbox shows all of the currently active workflows. Via the context menu of a workflow, you can access details on that process and edit them.



Users may be given the right to create reports for workflows and to view existing reports.

The **Statistics** item in the context menu of the workflow inbox lists the existing report configurations and the reports already made with these configurations. The entry is only visible if the workflow model has been configured accordingly in enaio® editor-for-workflow. Report configurations themselves are created via enaio® administrator-for-workflow.

You can create new reports using existing configurations.

Detail reports list all running processes. For each of these processes, detailed information on the status at the time of execution can be accessed.

Overview reports show the status at the time of execution of all processes which are listed in the configuration.

# enaio® media management

enaio® mediamanagement is an optional component of enaio® and consists of enaio® mediamanagement-import, enaio® mediamanagement-export, and enaio® mediamanagement-catalog.

- § enaio® mediamanagement-import is used to import image, audio, and video files and can automatically import any metadata at the same time.
- § enaio® mediamanagement-export is used to export image files. The file format and image size can be modified.
- § enaio® mediamanagement-catalog is used for the structured printing of image files.

The components are configured by the administrator. You can find instructions for configuring enaio® mediamanagement-import, enaio® mediamanagement-export, and enaio® mediamanagement-catalog in the 'enaio® ADMINISTRATOR' handbook.

## Installation

The components for enaio® mediamanagement are installed automatically during setup if you select the 'Mediamanagement' component in the setup options. The applications `axmediamanagement.exe` and `axmediaimport.exe` are then copied to the `...\client32` directory.

enaio® mediamanagement-import, enaio® mediamanagement-export, and enaio® mediamanagement-catalog are integrated into in enaio® client as external applications.

You require access rights to the object types and the following licenses for enaio® mediamanagement:

- § 'DPI' for enaio® mediamanagement-import
- § 'DPE' for enaio® mediamanagement-export
- § 'DPK' for enaio® mediamanagement-catalog

## About enaio® mediamanagement-import

With enaio® mediamanagement-import, you import media files from a medium, e.g. a camera, or from a file system, into the enaio® system. The index data fields of the imported objects are automatically filled with the data from the media files.

enaio® mediamanagement-import supports the following file types:

**Image** JPG, GIF, PNG, TIF, BMP, PSD, EPS, AI, CDR, PCT, TGA, PCX, WMF, SVG, CGM, DCM, PDF, ICO

**Audio** WAV, MP3, WMA, MID, OGG, MOD, M4P, AAC, DTS, AC3, FLA

**Video** AVI, MPG, WMV, MOV, MP4, RM, VOB, MPV, MKV, M2TS, TS, FLV, SWF, GIF

enaio® mediamanagement-import automatically detects connected devices. If enaio® mediamanagement-import is already started and you connect a device, such as a digital camera, a notification appears in the notification area; click on the notification to start an import with the selected directory or device.

Instructions for configuring enaio® mediamanagement-import can be found in the administrator handbook.

## Import Guide

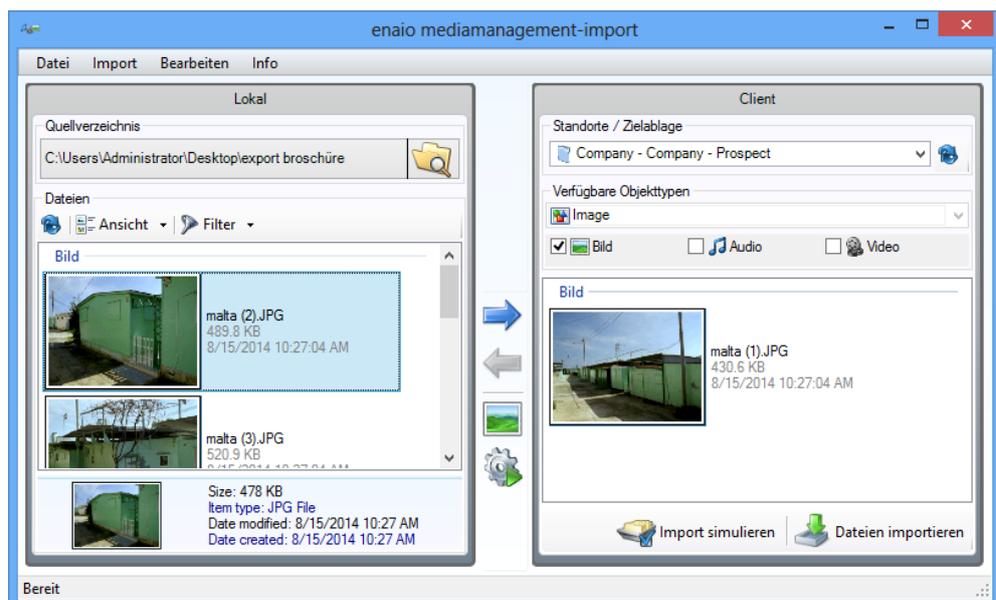
You can either launch enaio® mediamanagement-import directly from the application directory `...\\client32` or integrate the application as an external application, e.g. into enaio® client (see 'Creating Links').

## Overview of the User Interface

When you launch enaio® mediamanagement-import, all files in the most recently selected source directory are listed. If you are launching enaio® mediamanagement-import for the first time, you first select a source directory with the media files that you want to import.

## User interface

The user interface is divided into the areas **Local** and **Client**.



## The 'Local' area

All media files of the selected source directory are listed in the **Local** area. If you selected a directory, it will open automatically the next time you start the system and the contained files will be displayed. All image files are displayed as preview images, all audio and video files are displayed with the corresponding icons.



### Select directory

Select a source directory.



### Refresh view

Update the view of the file list.



### View

Specify how the files are displayed: as tiles, with details or as list.



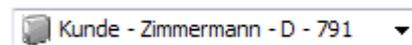
### Filter

Specify which media file types are shown in the file list: images, audio, and/or video files.

If you hover the mouse over a media file in the file list in the **Local** area, the complete information saved in the media file will be shown in the tooltip. You can disable the tooltip in the **Edit** area on the menu bar.

## The 'Client' area

All enaio® locations which are currently open can be selected in the **Client** area. The available object types are displayed for each location as well as the object types which can be configured per object type. If no locations are open in enaio®, you see a message to this effect and enaio® mediamanagement-import is launched. You can then open one or more locations in enaio®. Switch to enaio® mediamanagement-import and click the **Reload locations** button. All media files to be imported are also listed in the **Client** area. The import is also started in this area.



### Location/target filing file

Select the location in enaio® client where the media files which have to be imported will be filed.



### Reload locations

Update the selected locations in enaio®.



### Import files

Start the import.

If you hover the mouse over a media file in the file list in the **Client** area, the complete information saved in the media file will be shown in the tooltip. You can disable the tooltip in the **Edit** menu on the menu bar.

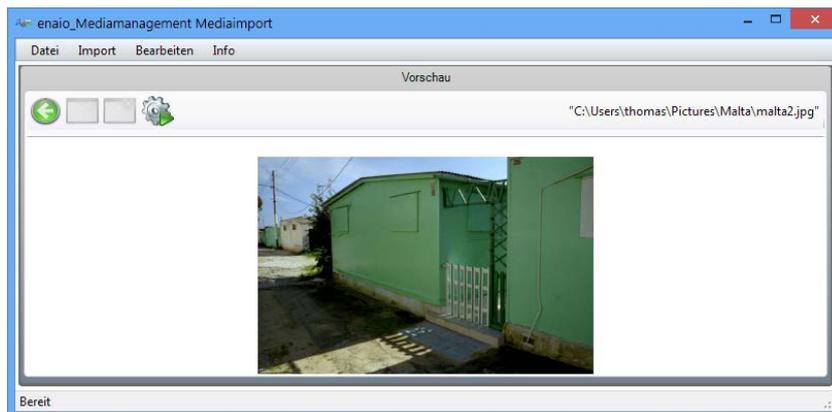
## Select media files for the import

Use the buttons between the **Local** area and the **Client** area to specify which media files are imported.

- ➔ **Add to the import**  
Add a selected media file to the import.
- ⬅ **Remove from the import**  
Remove a previously added media file from the import.
- , , or **Preview**  
Open the preview area (see 'The 'Preview' area').
-  **Open with default application**  
Open the program which is used by default to save the media files of the selected type.

### The 'Preview' area

Using the **Preview** button (for image files , for audio files , and for video files ) you can open a preview for image files and play back audio and video files directly in enaio® mediamanagement-import. To do so, select a file from the list in the **Local** area and click the **Preview** button. The enaio® mediamanagement-import view shows a preview, including the familiar controls from Windows Media Player.



If image files contain GPS data, the position in Google maps is displayed in a preview area. This feature requires an internet connection.

You can now use these functions:

-  **Close preview and go back**  
Close the preview and return to the file selection.
-  **Play in a new window**  
Opens a new window where the media file is played by Windows Media Player. enaio® mediamanagement-import also closes the preview and returns to the file selection. This feature is not available for image files.
-  **Open with default application**  
Opens the program with which the media files of the selected type are run by default. enaio® mediamanagement-import also closes the preview and returns to the file selection.

## Menu bar

These functions are available on the menu bar:

**File**    **Select directory**

Select a source directory with the media files which you want to import.

**Exit**

Exits enaio® mediamanagement-import.

**Import**    Open a list with all enclosed external data carriers (e.g. a camera, an USB stick etc.) and select a data carrier from which you want to import media files.

The menu item is only active if you have connected one or multiple data carriers.

**Edit**    **Update**

Update the view in the file list with the media files in the source directory.

**Refresh locations**

Update the selected locations opened in enaio®.

**Show preview tooltip**

Enable or disable the tooltip which is shown if you hover the mouse over a media file in the file list. The complete information saved in the media file is shown in the tooltip.

**Keep files after the import**

Specify whether the local media files will be kept or deleted.

If files are read-only files, they cannot be deleted after importing. Files which have not been deleted are listed in the error log.

**Info**    Open the info dialog of enaio® Media Import.

## Import Media Files

Take the following steps to import media files with enaio® mediamanagement-import:

1. Start enaio® client and open one or multiple locations where you want to file the media files.
2. Start enaio® mediamanagement-import.
3. Click the folder icon  in the **Local** area and select a source directory with the media files which have to be imported.

If you want to import media files from an external data carrier, select a corresponding medium through the **Import** menu on the menu bar.

If you enter a directory as command line parameter when you start enaio® mediamanagement-import, all image, audio, and video files which are contained in the specified directory will be shown in the file list.

The administrator has the possibility to limit the file size of media files. Media

files will not be imported if they are bigger than the specified file size. In the progress bar of the import and in the log you will see a message stating that the media files in question have not been imported due to their sizes.

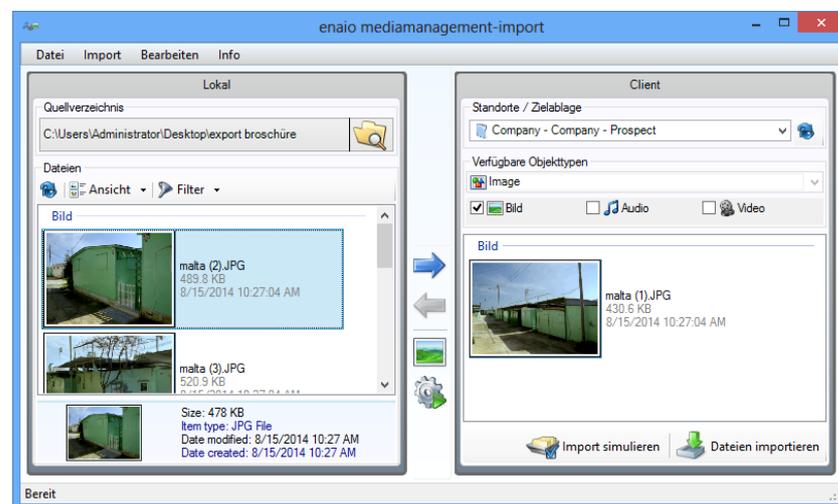
4. In the **Client** area, select the location from the selection list where you want to file the media files.

If you have only opened one location in enaio® client before, this location is preselected.

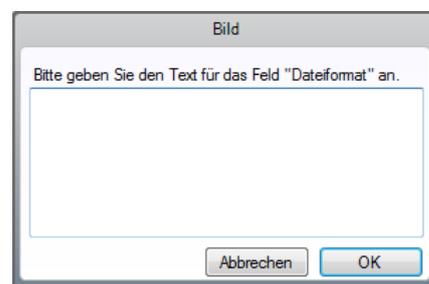
If no enaio® location is open, you can open a location afterwards. Then switch to enaio® mediamanagement-import and click the  **Reload location** button to refresh the locations shown in the dialog.

5. From the file list, select the media files you want to import and click the  **Add to the import** button. With the  **Remove from the import** button, you can delete an entry from the list of the files to be imported.

You can select multiple files if you press and hold **CTRL-** or **SHIFT**.



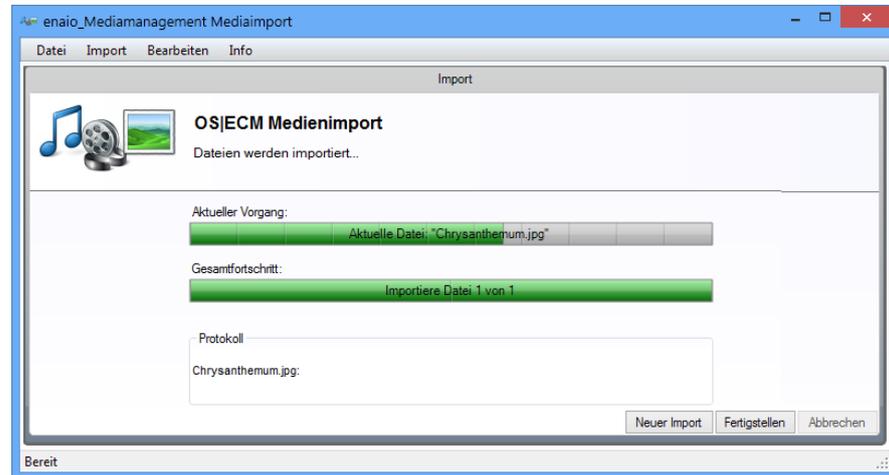
6. A click on the  **Import files** button starts the import. If your administrator has made the corresponding configurations, a dialog opens where you can enter a free text.



The text is entered into the object type field stated in the dialog in addition to the import value. The maximum length and whether you can enter letters, numbers and/or special characters depends on the settings made for the corresponding object type field in enaio® editor. If you are not sure which text you are allowed to enter, please contact your administrator.

7. Once the import process is complete, click **Finish** to exit enaio® mediamanagement-import. All import information is summarized in the **Log** area.

If you wish to import more media files, click on the **New import** button. enaio® mediamanagement-import then switches back to the view where you start by selecting a source directory.



If the import failed, you can use the **Show error file** button to open the import log.

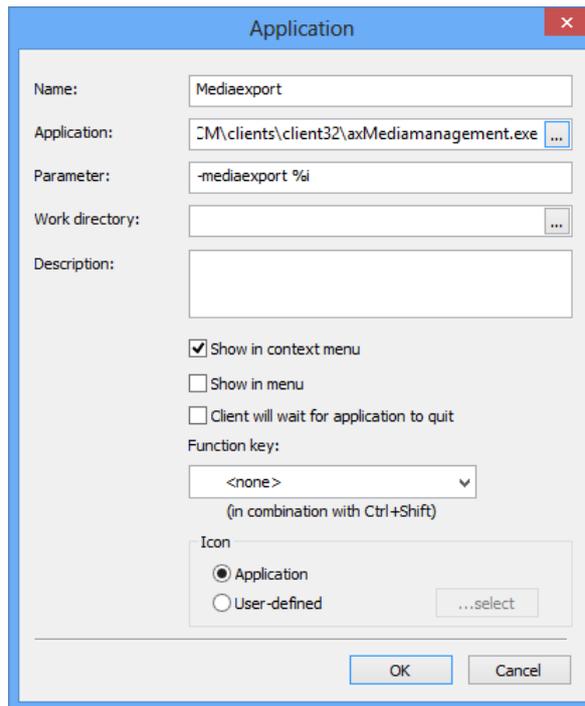
## About enaio® mediamanagement-export

With enaio® mediamanagement-export you export image documents. Export configurations – in which the file format and size are specified – are provided by the administrator.

enaio® media management export is integrated into enaio® client as an external application (see 'Creating Links').

To do so, create a link to `axmediamanagement.exe` from the `...\clients\client32` directory.

Enter `-mediaexport %i` as parameter.



## Export Guide

You can export image documents of the object type 'media content' and other image documents.

Take the following steps to export image files with enaio® mediamanagement-export:

1. Start enaio® client.
2. Select the image files you want to export.
3. Start enaio® mediamanagement-export by clicking the link.  
A preview of the image files is displayed.



4. Select the images you wish to export and click **Next**.  
The dialog for the configuration selection will appear.



5. Select the required configuration.  
The configuration properties are displayed.
6. Provide a path for the export and enable **Save export as file** if you want to save the image files in a ZIP archive (optional).  
The path and the compression for the configuration can be obligatory, i.e. this information cannot be modified in such a case.

7. Click **Start export**.  
The export will be executed. When the export has finished, the button **Save export as web page** will appear in the dialog.

✔ Export erfolgreich beendet

📄 Export als HTML speichern

The export to HTML corresponds to the enaio® mediamanagement catalog with HTML output (see 'Katalogdruck Guide').

8. Close the application from the menu **File** by pressing **Alt+F4**, or clicking the close button.

The image files are saved to the specified path in the `MediaExport` directory. If this directory already exists, a counter is appended.

Aside from the images, the directory also contains the `export.xml` file with the index data of the images.

## About enaio® mediamanagement-catalog

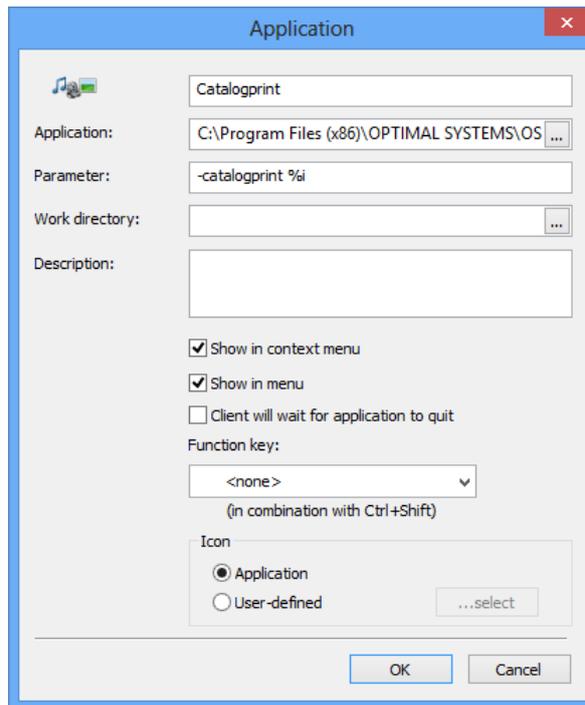
enaio® mediamanagement-catalog allows you to print image documents in a structured way. Configurations for catalog printing – in which the number of

images per page is specified – are provided by the administrator. The images can also be exported as a web page.

enaio® media management catalog is integrated into enaio® client as an external application (see 'Creating Links').

To do so, create a link to `axmediamanagement.exe` from the `...\clients\client32` directory.

Enter `-catalogprint %i` as parameter.



## Katalogdruck Guide

Take the following steps to print image files or export them as a webpage with enaio® mediamanagement-catalog:

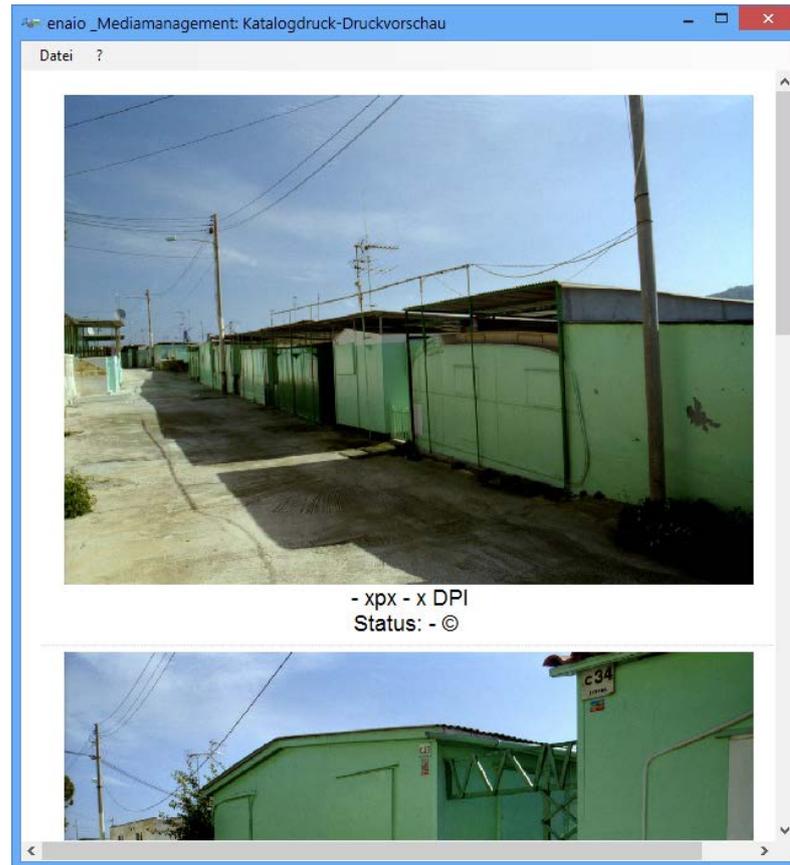
1. Start enaio® client.
2. Select the image files you want to print.
3. Start enaio® mediamanagement-catalog by clicking the link.  
A preview of the image files is displayed.



4. Select the images that you wish to print and then click Next.  
The dialog for the configuration selection will appear.



5. Select the required configuration.  
A preview is displayed.
6. Click **Print preview**.  
The print preview will be displayed.



7. From the **File** menu, select the function:

**Print**

The print dialog will open. You can select the printer and print settings and start printing.

**Save to HTML**

You select a directory for the files.

The `catalogprint.htm` file and the `catalogprint files` directory containing the image files are saved in this directory.

8. Close the application from the menu **File** by pressing **Alt+F4**, or clicking the close button.

# Setting Up the Workstation

## Workstation – Introduction

There are a variety of options for customizing your workstation according to your individual needs and the needs which arise from your cooperation with other users.

You can create **portfolios**. In a portfolio can be combined any documents for your individual work requirements, including documents from different cabinets.

Portfolios are accessible to all users, as long as no restrictions have been set in the security system.

You can add **notes** to documents, registers, and folders. Notes can be created via the details preview.

**Links** are cross-references to other objects. You can rapidly open the linked objects via the link.

Links and notes are accessible to all users, provided no restrictions have been set in the security system.

You can set a **follow-up** time for documents, portfolios, registers, and folders.

You can subscribe to documents, portfolios, registers, folders and queries. Subscribed objects will be displayed in the inbox area, whenever data for these objects is changed, and when the criteria of a subscribed query match an object.

You can release documents for other users who have no or restricted access rights. Among the information specified is which access rights are granted and a period during which the document share is valid.

In the display window, you can add **annotations** to image documents, on various layers. This feature can be used, for example, to highlight sections of text with annotations or to obscure sections of text for this group on group layers with annotations.

Personal layers are only accessible to you, group layers to the members of a group, and public layers to all users.

You can save and re-access **queries**. Queries are filled-out or empty query forms.

Queries that have been saved by you can only be accessed by you.

You can create links to external applications.

You can let other users access your queries and links.

Queries, links, and references to archive objects can also be placed on the **Public desktop** from where they can then be accessed by all users.

For rapid access, you can place frequently used search forms, searches, links to archive objects, portfolios, favorites, history, filing tray, and trash can and links to external applications on the **Navigation**. The elements of navigation can be arranged into groups for different work requirements. The group areas can be expanded and collapsed with a click of the mouse or using the spacebar.

The navigation can only be accessed by you.

enaio® is extensively configurable, offering **Settings** for confirmation dialogs or the display of windows. These settings are applied every time you log in to enaio® client. Choosing the correct settings for your requirements can greatly facilitate your work.

The administrator may restrict your ability to customize your own settings. The administrator can also assign a profile to you and to other users. He therefore specifies the configuration of the settings, of the quick access toolbar, of the object search, and of the navigation area, and overwrites your personal settings if necessary.

## Portfolios

In a portfolio can be combined all documents which you or other users may need for a certain area of your work.

Portfolios are indexed with the fields **Created for** and **regarding**. The entries in the fields indicating the author and the date are automatically made.

Portfolios can be  **typed**. Typed portfolios contain only registers of one register type or documents of one document type. In typed portfolios, folder index data in the form of hit list columns can be displayed for registers or documents. These data are not contained in regular portfolios.

Portfolios which are  **public** can be queried by all users, private portfolios can only be opened by the creator and those **for** whom the portfolio was created.

You can drag and drop documents and folders from the archive area or the filing tray into the portfolio, where they will appear as links. If you edit documents in a portfolio, the modifications are applied everywhere in the archive.

If you delete complete portfolios or documents in portfolios, the documents in the archive will not be deleted and the portfolios can be restored from the trash or deleted permanently.

Portfolios are searched for via the search form **Portfolios** in the object search. Portfolio searches can be saved (cf. 'Saved queries').

The **Portfolios** search form along with individual portfolios can be placed on the navigation from the hit list.

Users need authorization to open documents in portfolios.

## Creating Portfolios

1.  Go to the **START** ribbon tab and click the **Portfolio** button in the **New** group.  
The index data form opens.
2. Index the portfolio by filling in the **Created for** and **regarding** fields.
3. Select whether the portfolio will be public or private.
4. Specify whether the portfolio will be typed. For typed portfolios, select the register or document type which is the exclusive type contained in the portfolio.
5. Select whether the portfolio should be opened after saving. The selected setting remains in place for the next time a portfolio is created.
6. Confirm with **Save**.

® The portfolio will be created and opened.

If you delete a portfolio, it will be moved to the trash.

You can also create typed portfolios from the context menu of an object type in the object search or on the navigation.

## Including Documents in Portfolios

You can drag and drop documents, registers and folders from a folder window or a hit list to the portfolio.

Follow these steps to file documents to a portfolio:

1. Open a portfolio from the portfolio hit list.
  2. Open a hit list or a folder window.
  3. Use the mouse to drag documents, registers or folders onto the portfolio window. Typed portfolios can contain only registers or documents of the type that was specified when creating the portfolio.
- Ⓜ The documents, registers or folders are put into the portfolio as links. They can be edited there.

If there is a link to a portfolio on your navigation, you can simply drag documents, registers or folders onto the link.

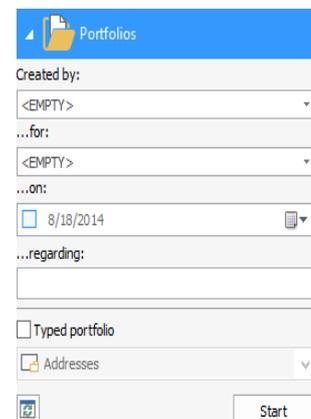
Objects in portfolios will only be shown to users who have the authorization to access the index data.

### Searches for Portfolios

Follow these steps to execute a query for portfolios:

1.  Go to the **START** ribbon tab and click **Portfolios** in the **Search** group.  
The portfolio query form will open.
  2. Fill out the query form.
  3. Click the **Start query** button or press **ENTER**.
- Ⓜ The hit list will open. It is equivalent to the folder hit list (see 'Folder Hit List').  
Typed portfolios are marked with a green icon in hit lists.

You can add the portfolio query to the navigation and quickly hide and show it from there.



The screenshot shows a search form titled "Portfolios" with a blue header. It contains several fields: "Created by:" with a dropdown menu showing "<EMPTY>"; "...for:" with a dropdown menu showing "<EMPTY>"; "...on:" with a date field set to "8/18/2014" and a calendar icon; "...regarding:" with an empty text field; a checkbox for "Typed portfolio"; a dropdown menu for "Addresses" showing "Addresses"; and a "Start" button at the bottom right.

## Favorites

Favorites are a personal area that no other users can see.

You can open the area using the ribbon tab **START**. You can place documents, folders, and registers here by dragging and dropping them.

If you select an object, you can add it to the favorites with the **Edit** ribbon group.

On a mobile device, each user sees their favorites in enaio® apps and in enaio® sync.

## Links and Notes

To create notes for documents, registers, folders and portfolios, use the note editor. They will be assigned to the archive object. The archive object is marked with a link icon .

You can add links to documents, registers, folders, and portfolios. Links are cross-references to other documents, registers, folders, or portfolios. If you have linked two archive objects, they will both be marked with the link icon. Links can be provided with a link text. This link will also be shown to both objects.

Links to a document, register, folder, or portfolio are managed in the link window of the folder window.

Notes can also be viewed and created from the details preview.

Archive objects with links or notes are marked with a link icon .

A query can be run on the text of notes and links.

Access to notes and link functions depends on the rights system. If an object is linked to another object for which you do not have access rights or which is located in the trash can, the object remains flagged with the link icon, even if you cannot access the linked object.

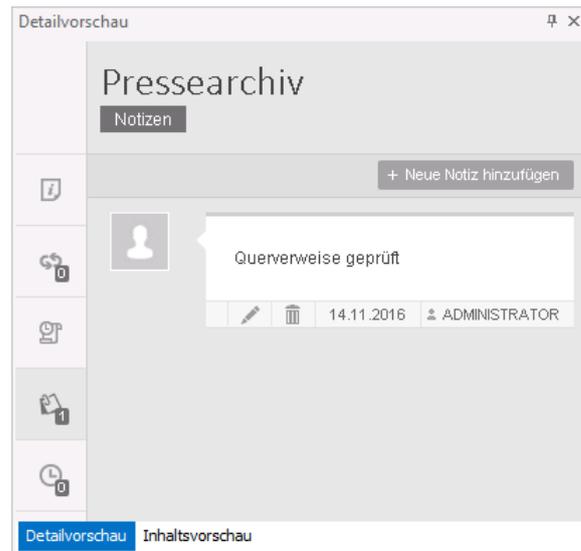
## Creating Text Notes to Documents, Registers, Folders, and Portfolios

Notes can be created via the detail preview. The details preview automatically shows the creator and creation date.

To create notes:

1. Select an archive object in a hit list or a folder window.
2. Open the details preview.
3. Click on **Notes**.

Existing notes will be shown.



4. Click **Add new note**.
  5. Enter a note.
  6. Select a color for the note.
  7. Click on **Create note**.
- ® The notes will be added to the archive object. In the display, it is indicated by a link icon.

## Creating Links to Documents, Registers, Folders, and Portfolios

Links are cross-references to other documents, registers, folders, or portfolios. The linked archive objects can be quickly shown via the links.

A link is created by dragging an archive object – folder, register, document, or portfolio – onto the link area of the folder window.

If you right-click and drag an archive object to another archive object, the context menu opens with the **Add** item. With this function, you can also create a link between two archive objects.

Alternatively, you can drag and drop a folder or register from a folder window to an opened link window.

Both linked archive objects are marked in the display with a link icon.

If you select the option **Automatic free text input** under **Settings > Auto**, an editor will open after you have created a link. In the editor you can add a note to the link.

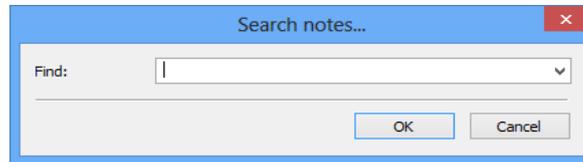
Objects in the link area of the folder window will only be shown to users who have authorization to the index data.

## Queries on Text Notes and Link Notes

You can run a query on notes and links.



Open the dialog **Search notes** via the **Search > Notes** button.



You must enter a search term.

Use the '\*' placeholder for any character and for characters of any number.

Previous query expressions are saved and can be found in the list.

Click **OK** to start the query.

The search will include all notes and links which are shown in the contents area of the folder window or in the link window.

The hit list will be shown in the contents area of the folder window or in the link window.



The **Cancel search** button stops a note query, so that all objects are again shown in the contents area or link window.

An incremental search against hit lists is not possible. The settings for placeholders (see 'Auto' Area) are not used here.

## Follow-Ups

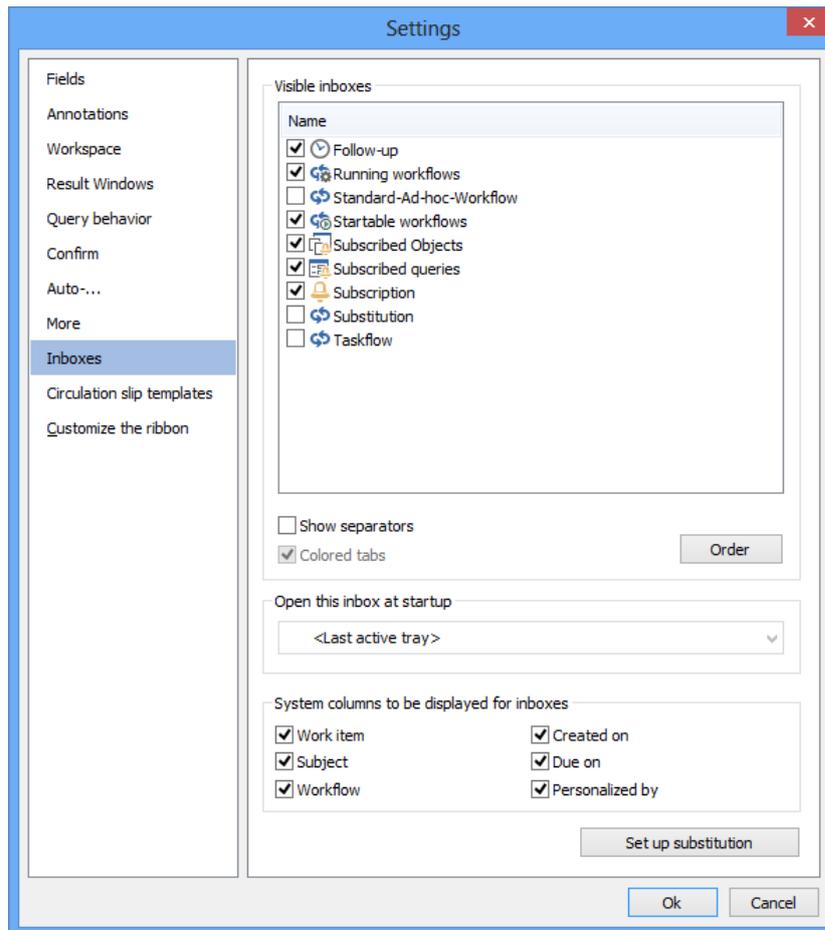
You can set a follow-up time for documents, portfolios, registers, and folders.

You can set up follow-ups for yourself, for other users, or for user groups.

Follow-ups are managed in the inboxes.

When a follow-up is due, the 🕒 icon will appear on the status bar and the register of the corresponding inbox will be highlighted.

Inboxes are managed via the **Settings**.



Follow-ups can be displayed in a separate inbox. If you do not select this option, they will be shown together with work items in the **My incoming messages** inbox.

Substitutes can be set up for follow-ups and for work items.

## Set up follow-ups

You can set up a follow-up for documents, portfolios, registers, and folders.

Follow these steps to create a follow-up:

1. Select a document, portfolio, register, or folder.
2.  Click the **Follow up** button in the ribbon tab or select the function from the context menu.

You can also drag archive objects to the follow-up area.

The configuration dialog will open.

Follow-up time...

on: 8/18/2014

in: 1 Day(s)

at: 15:15

Remark

Follow-up for

Myself

Others

Show:

Users

Groups

E-mail

Confirm with password

Name	Description
AMBER	Amber Vaughn
ANNE-SOPHIE	Anne-Sophie Vottin
ARNAUD	Arnaud Voirot
CÉCILE	Cécile Hagmaier
CLAIRE	Claire Martin
CLAUDIA	Claudia Schleret

Save Cancel

- In the **Remind** area, you select a date from the calendar or enter the time period in days, weeks, or months. Then you choose the time for follow-up from the list.

In the **Annotation** field, you have the option to enter an annotation. Comments are displayed in the inbox and in the subject of an e-mail.

In the **Follow-up for** area, select **myself** as the recipient or **other** users or groups from the list.

You can also enter an e-mail address for notification.

The **confirmation with password** option requires the recipient to enter their password to mark the follow-up as 'processed.'

The confirmation will be logged in the history of the archive objects.

- Confirm the settings with **Save**.
- ® Single, self-addressed follow-ups will be displayed in the **Follow-up** inbox. Use the options in the inbox toolbar to modify or delete data. Self-addressed follow-ups for multiple archive objects will not be displayed.

All self-addressed archive objects can be found in the inbox. Archive objects which are presented to you by other users will only be shown after the follow-up time.

Self-addressed follow-ups can be seen in the properties of the relevant subscribed object. To do this, open the properties and click the **Follow-ups** button. Follow-ups to other users are not shown.



You can use this dialog to add, edit and delete follow-ups.

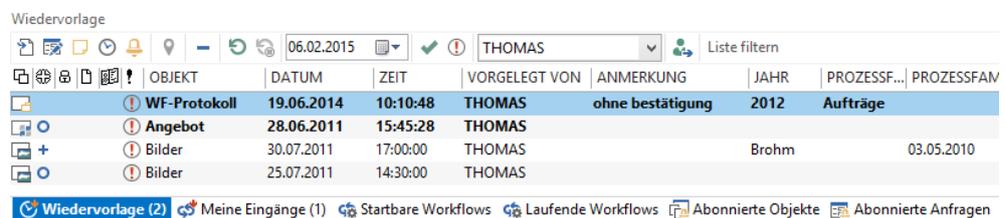
Users with the 'Client: Administer follow up' system role can display and edit follow-ups which have been set up for the object by other users.

### Follow-ups in the Inbox

Follow-ups are managed in the inboxes.

Archive objects which are presented to you by other users will be entered there 15 minutes before the follow-up time is due and they will be flagged with a  green follow-up icon. As soon as the follow-up is due, the  exclamation mark will turn red.

Open a follow-up inbox to display all followed-up archive objects.



Objects will only be shown to users who are authorized to access the index data.

On the toolbar of the follow-up inbox you will find these buttons:

-  Opens the selected object.
-  Opens the index data of the selected object.  
Edit the index data on the individual tabs.
-  Opens the link window of the selected object.
-  Opens the **Follow-up** window. There, you can edit follow-up data.
-  Deletes the selected object from the follow-up area. Only follow-ups that you mark as 'processed' can be deleted.
-  Refresh the view area.



Cancels the query. The objects which have already been found will be displayed.



8/18/2014

The date field opens a calendar from which you can select a date. All objects which were resubmitted up to this date are displayed, as well as all those which will be resubmitted in the future.



Marks a selected object as 'processed.' It will be deleted from the follow-up area.

Marking an object as 'edited' may require entering your password.

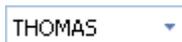


Mark edited objects as 'not edited.' They will be shown again in the inbox. Refresh the view and date view will fall back to default view.

When you open the follow-up area, all objects will be displayed which are currently resubmitted or which will be resubmitted within 15 minutes.

### Administration of Follow-ups

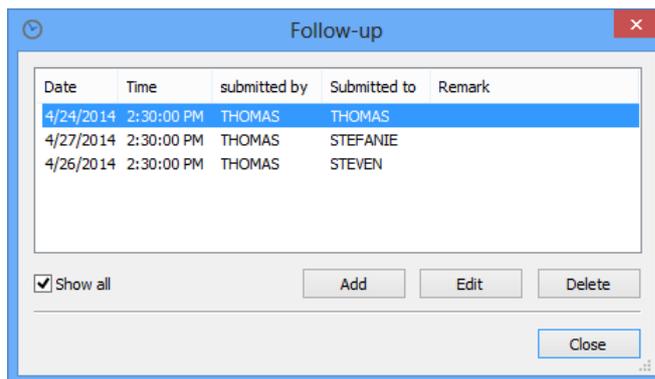
If you have been assigned the 'Client: Administer follow-up' system role, you will see a user list and the **Reassign follow-ups to another user** button on the toolbar. Access rights and system roles are assigned by your administrator.



From the list you open the follow-up area of another user. You can edit the shown data and objects.

Use the button to assign all follow-ups in this follow-up section to a different user.

If you select the option **Show all** in the object properties to be found in the **Follow-up area**, all follow-ups for this object are shown.



If a user is set up as a substitute for an absent user, they can also open and edit the follow-ups of the absent user for whom they are the substitute. The substitute's inboxes must be refreshed manually with **F5**.

## Subscription

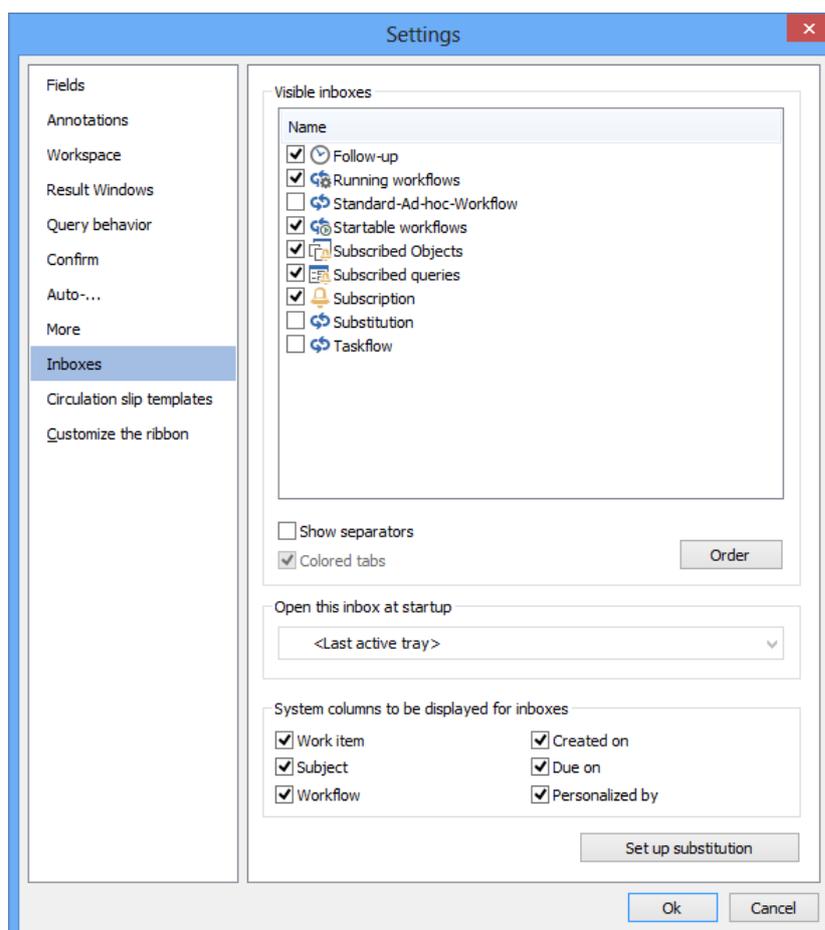
Documents, registers, and folders can be subscribed to. Subscribed objects will be listed in the inbox area as soon as their data has been edited. You can select whether you want the object to be listed in the inbox area when the index data of the object is edited or when the document content itself is edited.

You can also subscribe to queries. As soon as an archive object is created which matches your query criteria, or when an archive object has been edited and then matches this criteria, this object will be listed in the inbox area.

You can also subscribe to the deletion of objects. If the object is deleted, you will receive an e-mail notification. As long as the deleted objects are still in the trash, they can be restored.

Users with the system role 'Administrators' can set up subscriptions for other users and groups. Access rights and system roles are assigned by your administrator. You can request confirmation to be required for subscriptions.

You can set up your inboxes for subscriptions in the **Settings**.

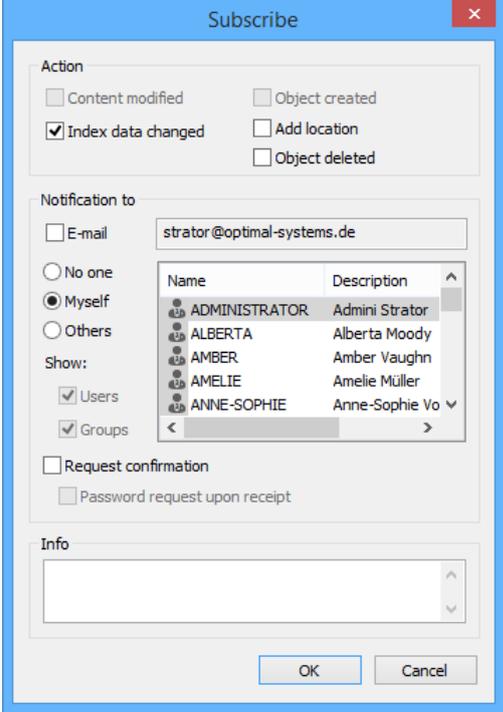


Inboxes for the configurations of subscribed queries and subscribed objects can be shown/hidden with the **Visible inboxes** area. Subscription notifications are shown in the main inbox **My incoming messages** or in the **Subscription** inbox if you turn on this inbox in the **Inbox area**.

## Subscribing to Objects

You can subscribe to objects with the  **Subscribe** function in the ribbon or by dragging an object to the **Subscribed objects** inbox.

In the **Subscribe** dialog, you can select the required options.



Name	Description
ADMINISTRATOR	Admini Strator
ALBERTA	Alberta Moody
AMBER	Amber Vaughn
AMELIE	Amelie Müller
ANNE-SOPHIE	Anne-Sophie Vo

You can decide whether or not to get notified once an object's **index data** are modified, or if the object is a document, once the **content** is modified.

For the action **Location added** the new location data is transferred.

If you enter an **e-mail address**, a notification will be sent. The e-mail message will contain a link to the edited archive object.

For **Object deleted** actions, e-mail notification is the only option. The e-mail message will contain the index data of the deleted object.

You can enter these persons as subscribers:

§ No one

Only an e-mail is sent.

§ Myself

Only you will find the subscription in your subscription area.

§ Others

The selected users and groups from the list will find the subscription in their subscription area.

Only users with the system role 'Administer subscriptions' can create and close subscriptions for other users. Access rights and system roles are assigned by your administrator.

You can request acknowledgement of notification to be required for subscriptions. When deleting subscriptions, the subscriber must confirm his notice over the dialog, or additionally, by entering his password.

The confirmation will be logged in the history of the archive objects.

Additionally, you can add an **Info** text, which will be shown in the inboxes.

Semicolons are not valid in the info text, and will be automatically replaced with colons.

Confirm by clicking **OK** and the object is subscribed and listed in the inbox **Subscribed objects**.

Object	Info	Com...	Customer ID
Customer			Krüger 673
Customer			Kays 915
Customer			Mainz 923
Support		Comp...	SUP-002/10

They are identified according to the selected actions.

If you want to end a subscription, select the object and delete it from the subscription area with the **Delete** button.

Subscriptions which were set up for you can only be removed by users who are allowed to set up subscriptions for other users. These subscriptions are marked: 

## Subscribed objects

Subscribed objects are listed in the subscription inbox or in the **My incoming messages** inbox as soon as the subscribed changes are made to the object.

Specific flags show whether the  index data or the  document itself has been edited. Also objects for which subscriptions have been created for other users or groups are highlighted: . A red exclamation point icon  is added to objects that require confirmation of notice.

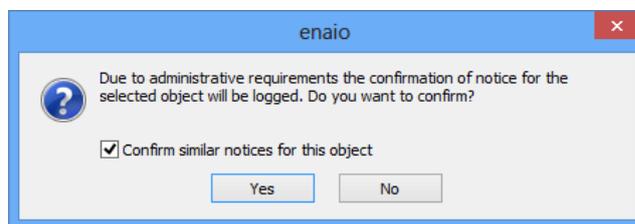
Objects appear in bold when they have not yet been opened. They will no longer be bold when you click **Mark as read** in the context menu.

Object	Date	Time	Edited by	Info	Comp
Compa...	8/14/2...	2:12:12 PM	ADMINISTRA...	Subscription	Feed
Custo...	8/18/2...	10:14:09 AM	ADMINISTRA...		Krüge
Custo...	8/18/2...	10:14:09 AM	ADMINISTRA...	New customer	Krüge
Customer	8/18/20...	10:12:35 AM	ADMINISTRAT...		Krüge

As in folder windows and hit lists, you can open and edit objects.

A notification is deleted with the button. After confirmation, you can also delete the corresponding subscription.

Subscriptions which have the confirmation of the notification property will require confirmation in a dialog before being deleted.



If you click **Yes**, the confirmation will be logged in the history. If you click **No**, the subscription will not be deleted.

The settings in the 'More' area enable you to define whether subscribed objects, which you have modified, are to be listed and whether to show all changes or only the most recent one.

## Subscribing to Queries

You can subscribe to queries using the **Subscribe** feature from the context menu of a search form.

Queries in expert mode with specific values, e.g. '#Date#' cannot be subscribed. These queries would output invalid results.

In the **Subscribe** dialog, you can select the required options.

You can be notified when an object is created which matches the query criteria in the search form. You will receive a message if a change is made to the index data of an object, if a location is added or modified, or if an object is deleted.

As in subscribed objects, you can enter an e-mail address, to which a notification with a link to the object will be sent. For the deletion of objects, only notification by e-mail is possible. The e-mail message will contain the index data of the deleted object.

You can enter these persons as subscribers:

§ No one

Only an e-mail is sent.

§ Myself

You alone will find the subscription in your subscription inbox.

§ Others

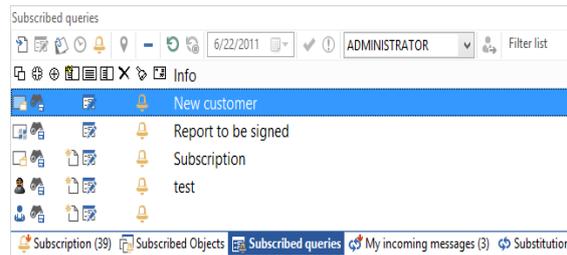
The selected users and groups from the list will find the subscription in their subscription inbox.

Only users with the system role 'Administer subscriptions' can create and close subscriptions for other users. Access rights and system roles are assigned by your administrator.

You can request acknowledgement of notification to be required for subscriptions. When deleting subscriptions, the subscriber must confirm his notice over the dialog, or additionally, by entering his password. The confirmation will be logged in the history of the archive objects.

Additionally, you can add text in the **Info** field, which will be shown in the inbox.

Confirm by clicking **OK** and the search is subscribed and listed in the **Subscribed queries inbox**.



The subscriptions are marked with the action and notification icons.

The **Open** button opens the search form with the search criteria of the subscribed query. The **Subscribe** button opens the configuration dialog of the subscribed query.

You can edit the query criteria and the subscription data, and then decide if you want to apply the changes, or save them as a new subscribed query.

If you want to end a subscription, select the subscribed query and remove it from the inbox with the **Delete** button.

Subscriptions which were set up for you can only be removed by users who are allowed to set up subscriptions for other users. These subscriptions are marked as system subscriptions: 

## Subscribed queries

If the query criteria for a subscribed query are fulfilled by new or edited objects, the objects will be listed in the Subscriptions inbox or in the **My incoming messages** inbox.

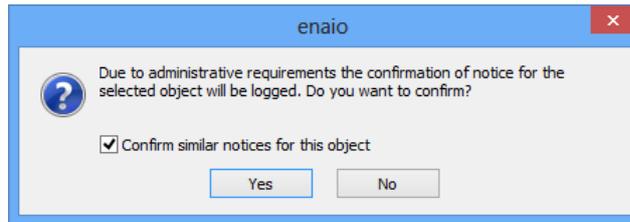
enaio® server periodically checks whether query criteria of a subscribed query have been fulfilled. If they are fulfilled by the current state, notifications for all changes within the last period will be sent, regardless of whether every single change met the query criteria. If the criteria are not fulfilled by the current status, no notification will be sent, regardless of whether a change has previously met one of the criteria.

Subscriptions of a user for other users or groups are flagged with . Specific flags show whether the  index data or the  document itself has been edited or if a  new object has been created.

As in folder windows and hit lists, you can open and edit objects.

A notification is deleted with the  button.

Subscriptions which have the confirmation of the notification property will require confirmation in a dialog before being deleted.



If you click **Yes**, the confirmation will be logged in the history. If you click **No**, the subscription entry will not be deleted.

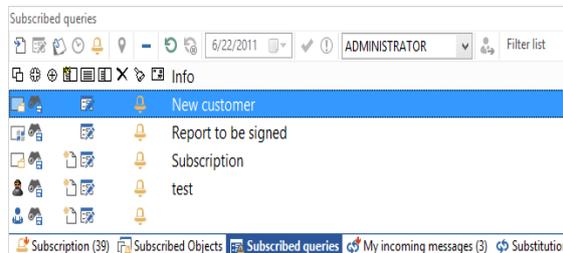
If an object has been changed more than one time, a confirmation of notice is possible at once for all modifications of the same type – i.e. either all index data changes or all changes to a document.

Users with the 'Administer subscriptions' system role can edit the system subscriptions of queries on the **Subscribed queries** inbox. Access rights and system roles are assigned by your administrator.

## Administering Subscriptions

Users with the system role 'Administer Subscriptions' can set up subscriptions for other users and groups; they can access the subscriptions of other users from their own subscription inbox; and, in the properties of an archive object, they can open a list of subscribers.

Users with this system role will find a user list on the toolbar of the follow-up/subscription inbox; with this list, they can open the subscription inboxes of other users. Access rights and system roles are assigned by your administrator.



In the property of an archive object, a list of all users and groups which have subscribed to the object can be opened.

## Document Shares

Documents can be shared for other users who have no or restricted access rights. Among the information specified is which access rights are granted and a period during which the document share is valid.

Share functions depend on system roles:

- § All users can use the ribbon tab **START > Objects > Shared for me** to open a list of documents shared for them.

- § From the ribbon tab **VIEW > Areas > Shared by me**, users with share rights can share documents and open a list of documents shared by them and edit document shares.
- § From the ribbon tab **VIEW > Areas > All document shares**, users with administrative share rights can open a list of all document shares and remove shares by other users.

## Shared Documents

The list of documents shared for you can be opened from the ribbon tab **START > Objects > Shared for me**.

Status icons indicate whether you can edit the index data or only view it and whether you can edit the content or only view it.

Deletion rights and rights to annotations for image documents cannot be granted via document shares.

Document shares are valid throughout the specified period. On the last day, the document share is indicated in red and an icon appears in the status bar.

From the context menu you can access the document in accordance with the access rights granted.

Data transfer with enaio® data-transfer is not possible for shared documents.

## Sharing Documents

Users with share rights can share documents:

- § From the context menu of a document, select **Share**.
- § Select one or more users.
  - The list of users can be filtered.
- § Enter a period.
  - The maximum length of the period is predefined on an administrative level.
- § Select the intended access rights.
  - The right 'View index data' is always assigned. The right 'Edit contents' includes the right: 'Show content'.
- § Enter a note.
- § Confirm with OK.

The document is shared and shown in the area **Shared for me** of the relevant users.

## Administering Document Shares

Users with share rights can edit their shares via the area **Shared by me**:

- § In the area **Shared by me**, from the context menu of a document, select **Edit share**.

§ Edit the period, rights, or the note.

Users for whom the document was shared cannot be modified.

§ Confirm with OK.

The share is modified.

Document shares can also be removed.

Users with administrative share rights can remove but not edit the document shares of other users via the area **All shares**.

## Saved queries

You can save completed query forms, individually or combined with full text searches, as queries. The query will be displayed in the object search and can be opened from there.

Queries with variables can be saved. To do so, you have to select all those fields from the combined query form that are to be queried. The fields are then used to create a new query form which will be opened when starting the query.

Queries in expert mode can also be saved. But more than expert mode data of one or more query forms are not saved.

Saved queries can be configured to run immediately when they are opened or to give the user a chance to edit them.

A saved query can be set as the start query. The start query will open and be executed automatically when enaio® client is started.

Saved queries can also be added to the navigation, and can be managed in the object search in folders.

Queries for portfolios can also be saved, but without variables and without expert mode.

Queries which you save are only accessible to you, but you can also send them to other users.

The administrator can make saved queries available to you.

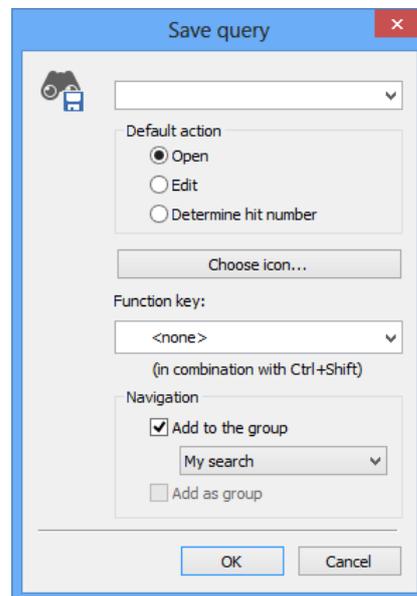
A query over basic parameter can only be saved in combination with other queries.

## Saving Queries

Follow these steps to save a query:

1. Open a query form or a combination of search forms (see 'Combined Queries').
2. Fill out the query form.
3. Open the context menu of the query form with a right click.

4. Click the **Save** item.  
The **Save query** window will open.



5. Name the query.  
Decide whether to execute the query instantly at start-up or to open the hit list, whether or not to make your query editable before its execution, and whether or not to determine and display the number of hits.  
The **Select icon** button can be used to assign an icon to the saved query. The **Function key** list enables you to choose a function key which, in combination with **CTRL+SHIFT**, will start the query. Check whether the keyboard shortcuts are already in use.  
You can specify whether a query will be added to the navigation as well as to the desktop area. Queries with variables can represent an extra group in the navigation. If the search bar already contains a saved query as an extra group, the new saved query with its variables will become the last group in the navigation.
6. Click **OK** or press **ENTER**.

® The query is saved and shown in the object search in the **Desktop** directory.

In full text search forms, you will find a **Save** button with which you can open the **Save query** window where you can save the search terms and the object selection as a saved query.

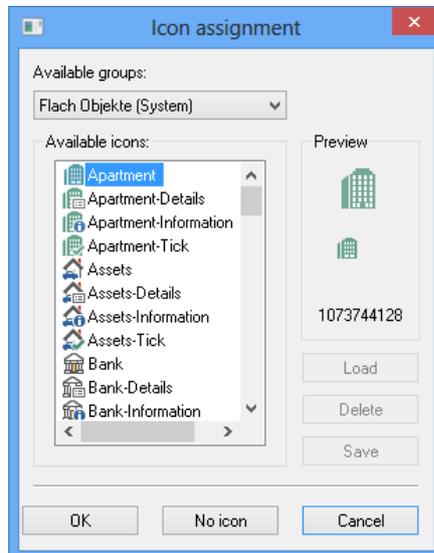
### Icon assignment

You can assign an icon to saved queries and link to external applications.

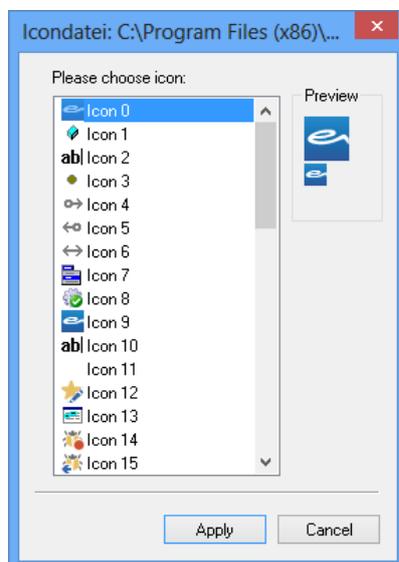
The **Icon assignment** dialog lets you select a pre-installed icon from a group; you can also upload your own icons.

Loading and deleting icons requires the appropriate system role. Access rights and system roles are assigned by your administrator.

If you want to load icons, select the group **General icons (user-defined)**, click the **Load** button and select an icon file (.ico) from the file selection dialog.



If you select a library (.dll) or a program (.exe), all icons contained in the file will be displayed.



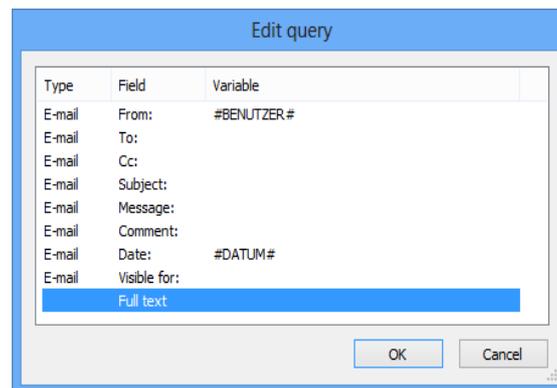
You can select the intended icons and **apply** them.

The imported icons will be placed in the **General icons (user-defined)** group. The assignment must be saved before you can use the icons.

## Saving Queries with Variables

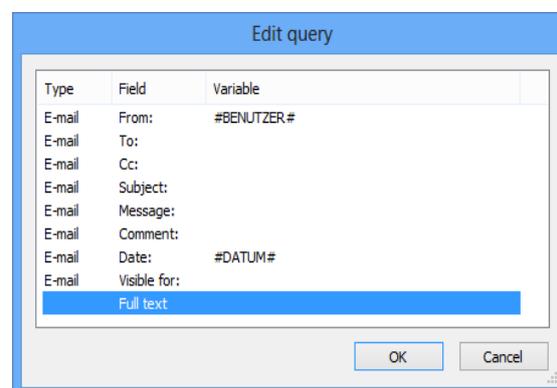
Follow these steps for saving a query with variables:

1. Open a query form or a combination of search forms (see 'Combined Queries').
2. Complete the fields of the query forms that are designated to have constant values.
3. Open the context menu of the query form with a right click.
4.  Click the **Variables** item.  
The **Edit query** window will open.



5. Enter variables (see 'The 'Edit Query' window').
  6. Click the **OK** button.  
The **Save query** window will open.
  7. Name the query.  
Decide whether to execute the query instantly at start-up or to **open** the hit list and whether or not to make your query **editable** before its execution.
  8. Click **OK** or press **ENTER**.
- Ⓜ The query is saved and shown in the object search in the **Desktop** directory.  
You can add the query to the navigation to be able to hide/show it quickly.

### 'Edit query' window



In the **Edit query** window, all fields from the search form or combined search forms are listed. Entries from a search form will be shown in the **Variable** column as constant values.

You can enter constant values into the cells of the **Variable** column or select values from a list. When you click on a cell, the list opens. It contains specific values, variables, and static variables. Static variables are variables which will be temporarily saved and used as defaults the next time you open the query.

The following specific values may be available:

- § #User# – the current user name.
- § #Date# – the current date.
- § #Null# – a non-indexed field,
- § #Computer-IP# – the IP address of the querying computer.
- § #Computer-GUID# – the GUID of the querying computer.
- § #Computer-Name# – the name of the querying computer.

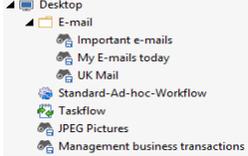
The unequal operator '<>' can be placed before special values, but not variables.

Only fields in which you enter a variable (\$VARn\$) or a static variable (\$STATn\$) from the list will be shown when starting the query. Fields containing specific values or entered values will not be displayed. Empty fields will not be evaluated.

If you map the same variable to more than one field, only one allocation is displayed. The value which you enter will be applied to the other mappings of the variable.

The fields for expert mode queries are neither saved nor shown in the **Edit query** window.

### Starting Saved Queries

1.  Open the object search.
2.  Open the **Desktop** area.  
Saved queries will be shown.
3. Double-click a query.

- Ⓜ Depending on the query's settings, the query will open, execute immediately, or the number of hits will be displayed.

Queries which contain variables will always open. If the query contains static variables (\$STATn\$), the entered value will be temporarily saved and used as defaults the next time you open the query.

All simple field types and catalogs are available in the search forms of saved queries with variables. For fields to which add-ons are assigned, the add-ons are not available in the search form. The fields can be filled out manually. The date add-on and the user add-on are available.

In date, time, and number fields, an interpolation search is available.

The hit list for a saved search will have the name of the query in its status bar.

## Editing Saved Queries

Saved queries can be deleted, renamed, and placed on the navigation (see 'Navigation'). It can be set as a start query.

If you select a saved query in the **Desktop** area of the object search, you will find the following entries in the context menu:

§ Open

The query will open and, depending on the settings (see 'Query Behavior' Area), either be executed or shown.

§ Edit

The query will open for editing.

§ Execute when starting

The selected query is marked by an arrow icon and will open when the enaio® client is started. You can set this option for any number of queries.

§ Rename

The name of the query is selected. You can edit it in the object search.

§ Make public

The query is available to other users in a public desktop. For this feature, special rights are required.

§ Remove from Navigation and Object search

The saved query is deleted from the navigation and the object search.

§ Copy for navigation

The saved query is copied and can be inserted into an object group of the navigation using the context menu entry Copy from object search.

§ Sending an e-mail

The query is sent to an e-mail recipient. An enaio® client user can double-click the attachment to move it to their object search.

If a query is opened on a tab, you can send it also from the context menu of the tab.

Saved queries can be managed in folders within the **Desktop** area. Select the **Desktop** and select **New folder** from the context menu. A new folder is created. You can name the folder.

The context menu contains functions to rename folders and delete empty folders.

Saved queries can be placed in a folder using drag and drop.

## SQL Queries

SQL queries are queries which allow you to access data, regardless of the access rights and the organizational system containing archive objects. This can be made available by an administrator.

 SQL queries are found in the object search. They are marked with a special symbol.

Like other queries, SQL queries are also executed by double-clicking on them.

You can choose whether the result of the query should be an SQL hit list or a list of DMS objects. DMS objects can then be used and edited in the usual way as hit lists.

Depending on the configuration of the SQL query, an SQL hit list can be linked with scripts. You can run the scripts by double-clicking.

The administrator will notify you of the functions of the scripts.

As an SQL command, only a statement in the format `select id from object1` or `select o.id from object 1 o` is allowed. The queries can contain variables which are queried from a dialog. The variables can be set as defaults.

SQL queries can be sent to e-mail recipients using the context menu in the object search. If an SQL query is open on a tab, you can send it also from the context menu of the tab.

An enaio® client user can double-click the e-mail attachment to move it to the object search area.

The system role 'Save own settings' is required for deleting SQL queries.

## Links to External Applications

You can create links to external applications. The links are displayed in the object search and the applications can be executed from there.

Links which you have created can be made available to other users.

To create links to external applications you need the relevant system role.

### Creating Links

Perform the following steps to create a link to an external application:

1.  Open the object search.
2.  **Desktop** Select the area **Desktop**.
3. Open the context menu by right clicking.
4. Select the item  **External application**.  
The **External application** window opens.

5. Enter a name in the text box.

Select an application for the **Application** field using the file selection dialog.

If you enter an application without a path, it will be searched for in the `... \client \client32` directory. If it is not found there, it will be searched for in paths that are specified in the 'PATH' environment variable.

Scripts cannot be integrated:

Enter parameters for the call in the **Parameters** field.

Parameters which can be used for external OPTIMAL SYSTEMS applications can be found in the corresponding documentation.

If you do not enter any parameters, only the application will be opened.

Select a **Source directory**. Some applications require files to be located in a particular source directory.

The **Description** entered here will be shown as a tooltip.

If you select the **Show in context menu** option, you can call up the application with the archive object from the context menu of a selected archive object.

If you select the **Show in toolbar** option, you can use a button on the **START** ribbon tab to call up the linked application with a selected archive object. The label will be used for the tooltip.

The **Client will wait for application to quit** option prevents you from continuing your work until the external application has closed.

The **Function key** list allows you to choose a function key that, when

pressed with **CTRL+SHIFT**, will start the external application.  
Check whether the keyboard shortcuts are already in use.

If you select the **Icon – Application** option, links are identified with the application-specific icons.

Instead, you can use the option **User-defined** and the **Select** button to select an icon (see 'Saving Queries').

6. Confirm your entries with **OK**.

Ⓢ The link is saved and will appear in the **Desktop** directory in the object search.

If you edit enaio® documents in an external application, changes are not imported.

### Parameters for External Applications

The following parameters are used for data transfer:

§ %o

One or more paths to enaio® objects are directly transferred. The space character is used as a separator. If the path or file name contains spaces, the file path is specified in quotation marks.

§ %p

A path to a text file which contains a path to an enaio® object in each line.

§ %i

A path to a text file which contains a unique ID and the object type - separated with a comma - per line. This parameter is useful if many objects are transferred.

§ %f

One or more paths to files in the archive. If the files are not yet in the CACHE area of enaio® client, they will be transferred there. Spaces are treated in the same way as for parameter %o.

§ %g

A path to a text file which contains a path to a file in the CACHE area in each line. This parameter is useful if many objects are transferred. If the files are not yet in the CACHE area of enaio® client, they will be transferred there.

### Starting External Applications Using Links

Follow these steps to start external applications via a link:

1.  Open the object search.
2.  Open the **Desktop** area.
3. Double-click a link.

® The external application is started.

External applications can also be started from the **START** ribbon tab, using a function key with **CTRL+SHIFT**, or by selecting the **Send e-mail** item from the context menu of an object.

Depending on the configuration parameters, the object that is currently selected is transferred to the external application.

## Editing Links

You can delete, rename, and add links to the navigation (see 'Navigation'). You can also change the parameters and assign function keys to the links.

If you select a saved query in the **Desktop** area of the object search, you will find these features in the context menu:

§ Execute

The external application is started.

§ Edit

The External application window opens. You can make changes.

§ Make public

The link becomes available to other users from a public desktop. For this feature, special rights are required.

§ Remove from Navigation and Object search

The link to the external application is deleted.

§ Copy for navigation

The link is copied and can be inserted into an object group of the navigation using the context menu entry Copy from object search.

§ Sending an e-mail

The link is sent to an e-mail recipient. An enaio® client user can double-click the attachment to move it to the object search area.

Links can be organized in folders in the **Desktop** area. Select the **Desktop** area and from the context menu select the item **New folder**. A new folder is created. You can name the folder.

The context menu contains functions to rename folders and delete empty folders.

Links can be moved into a folder with drag and drop.

## AXVBTASK

AXVBTASK works with Microsoft Outlook. AXVBTASK works with Microsoft Outlook. Thus, you cannot only create tasks, conversations, journal entries, contacts and appointments but also add folders, registers and documents to them.

Set up a link for the application (see 'Creating Links'). The **axvbtask.exe** application is in the `...\client32` directory.

You can specify the following Microsoft Outlook parameters:

Parameter	Description
-a	Create a task in Microsoft Outlook
-d	Create a discussion in Microsoft Outlook
-j	Create a journal entry in Microsoft Outlook
-k	Create a contact in Microsoft Outlook
-t	Create an appointment in Microsoft Outlook

Enter these parameters to transfer enaio® objects:

Parameter	Description
%p %o	For each marked object, these parameters attach an OS file to the Microsoft Outlook object. Both parameters are equivalent.
%g	For each marked object, the parameter attaches a document file to the Microsoft Outlook object. This option is only available when dragging and dropping documents.
%i	The parameter attaches a text file with the ID of the marked object to the Microsoft Outlook object.

If you do not specify a Microsoft Outlook parameter, no task will be created.

The Microsoft Outlook parameter must always be entered first.

#### Example for a Parameter Transfer

The following parameters are transferred to the `axvbtask.exe` application: `-d %g`

A discussion is created and the selected documents are sent as document files.

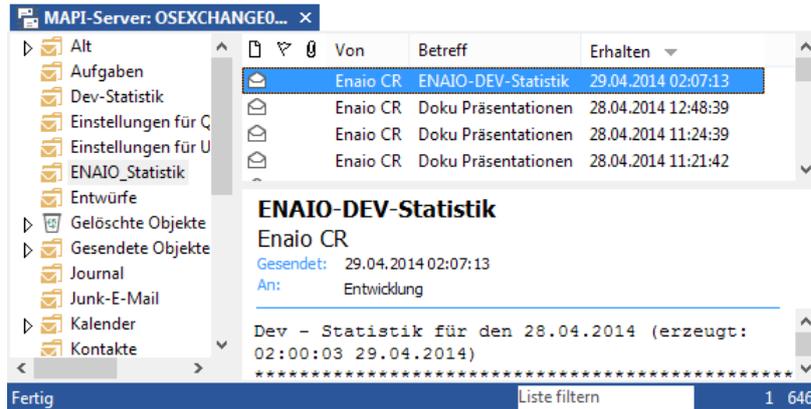
## Mailbox

A mailbox can be integrated with the enaio® client object search.

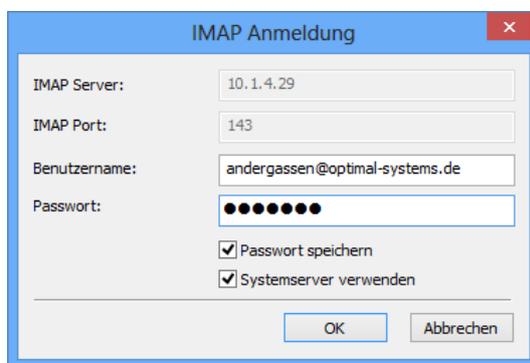
In the mailbox, you will have access to your e-mail messages and can transfer them into the archive.

If a MAPI system is integrated, you can go to the **More** area of the settings dialog to specify whether the MAPI inbox is shown. The inbox of the user who is logged on to the operating system will open. If an IMAP system is integrated, the inbox is always accessible.

Open the inbox from the **START** ribbon tab.



Before the window is opened, you have to log in to an IMAP system with your user name and password.



You can save your user-specific login data. The administrator can set up the IMAP server or allow you to do it yourself by indicating the corresponding port.

If you press and hold the **CTRL** key while opening the IMAP inbox, the login dialog will open again, even if the login data has been saved. You can also open the dialog by use of the context menu.

In an IMAP System, unlike in a MAPI system, it is possible to access the mailbox of a user who is not logged on to the operating system.

The inbox functions of an IMAP and MAPI system are the same.

Folder



Updates the display after changes have been made.

Update



Cancels the update. The e-mails which have already been found are displayed.

Cancel

E-mail



Opens the selected e-mail.

Open



Deletes the selected e-mail.

**Delete****Previous**

This will open the previous e-mail message from the hit list or folder window.

**Next**

This will open the next e-mail message from the hit list or folder window.

**Reply****Reply**

You can reply to an e-mail. The sender's address will appear in the send-to field in your e-mail.

**Reply to all**

This function replies to the sender and to all other addresses to which the original message was sent.

**Forward**

You can forward a message. The text of the message will be transferred to the compose dialog of your e-mail application. You can then enter an address and forward the message.

**Save****Save in**

You can save the text of an e-mail message as a text file.

If you want to save an e-mail attachment, select it and then click **Save as**.

E-mails in IMA format can be saved in this format.

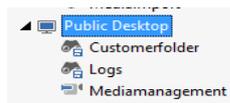
**As document**

You can file e-mails in your filing tray, an opened folder or a default folder.

## Public desktop

While the archive objects which you have set up for your workspace are only available to you, the archive objects in the public desktop can be accessed by all users. Queries, links, and references in this area, however, can only be set up, modified, or deleted by users with the appropriate system roles. Access rights and system roles are assigned by your administrator.

The display and features of archive objects on the public desktop are the same as those on your personal workspace.



Saved queries, SQL queries, links to external applications, and references to archive objects can be created and managed in folders.

You receive a confirmation dialog, if you do not have access rights to objects.

## Administration of the Public Desktop

Users with the 'System-wide configuration' role can configure the public desktop. Access rights and system roles are assigned by your administrator.

Using the **Publish** function, users with the relevant system role can copy archive objects from the personal workspace (see 'Navigation') or from the context menu of the objects to the public desktop.

Archive objects on the public desktop can only be deleted by users with the 'System-wide configuration' system role. These objects cannot be edited.

The security system is taken into account when queries are executed or references opened. For links to external applications, the configured path has to be accessible.

## Navigation

The navigation area is your personal workspace. The search bar allows quicker access to full text, portfolio, and queries with variables. The corresponding query forms are integrated on the search bar.

You can also place links to individual objects, query forms, saved queries, and links to external applications on the navigation area, these items can then be sorted into groups. Double-click on a link on the navigation to start queries and external applications.

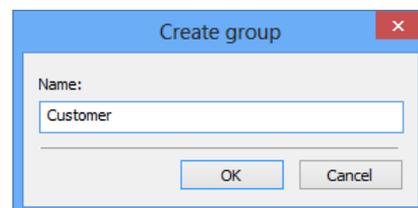
### Groups in Navigation

If you want to organize links to individual objects, query forms, saved queries, or external applications on the navigation area, you have to create a group.

#### Creating Groups

1.  Open the navigation.
2. Right-click the toolbar to open the context menu in the navigation area.
3. Select the item **Add > Object group**.

The **Create group** window will open.



4. Enter a name for the group.
  5. Click **OK** or press **ENTER**.
- Ⓜ The group is created and will open.

The contents area of a group can be shown and hidden using an arrow. Drag the required objects onto this area to create links.

### Group arrangement

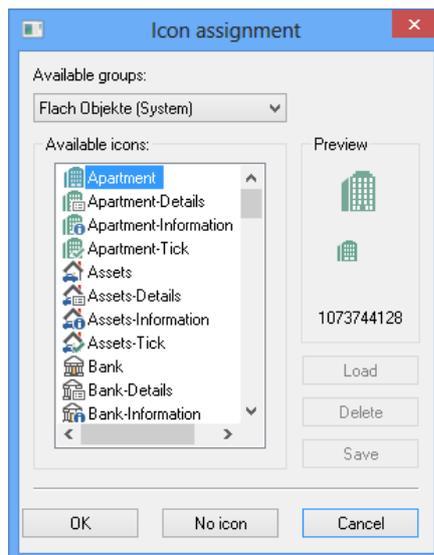
Groups in the navigation can be deleted and renamed from the **GROUP** ribbon tab or the context menu. The order of the groups on the search bar can be changed using the mouse. Simply drag the group to another position.

### Group icons

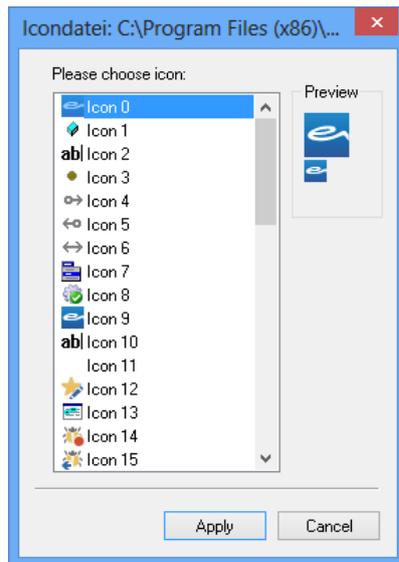
You can assign an icon to every group. The **Select icon** item in the context menu opens the **Icon assignment** dialog. The dialog offers all pre-installed icons from a group and allows you to upload additional icons.

Loading and deleting icons requires the appropriate system role. Access rights and system roles are assigned by your administrator.

If you want to load icons, select the group **General icons (user-defined)**, click the **Load** button and select an icon file (.ico) from the file selection dialog.



If you select a library (.dll) or a program (.exe), all icons contained in the file will be displayed.



You can select the intended icons and **apply** them.

The imported icons will be placed in the **General icons (user-defined)** group. The assignment must be saved before you can use the icons.

Groups, like queries, can be removed from the navigation area using the context menu.

### Creating Links for the Navigation

All objects which are shown in the object search area and all objects in hit lists or folder windows can be dragged onto the contents area of a group in order to create a link.

Follow these steps to create links:

1.  Open the navigation.
2. Open the contents area of a group using the arrow.
4. Select an object in the object search or the hit list.
5. Drag an object to the contents area of the group, while holding the mouse button pressed.

Ⓜ The link is created in the group.

Using the context menu, you can edit objects on the navigation. The functions depend on the object type.

### Queries in Navigation

The navigation provides quick access to queries with variables, full text queries, and portfolio queries. The forms for these queries are not opened in a new window in the workspace; rather, they can be faded in and out in the navigation area.

## Portfolio Queries

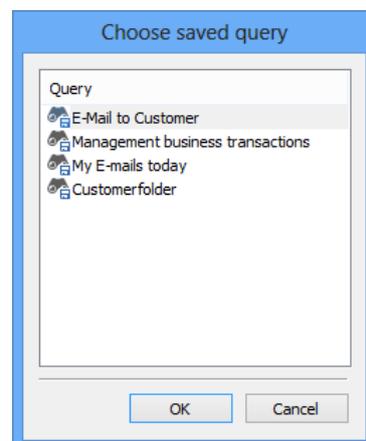
In the context menu of the navigation, the **Add > Portfolio query** item allows you to integrate a portfolio search form into the navigation.

The form can be shown and hidden using the arrow.

## Queries with Variables

The **Add > Query with variables** item in the context menu of the navigation enables you to add an existing saved query with variables (see 'Saved Queries') to the navigation.

Select the intended query and confirm with **OK**.

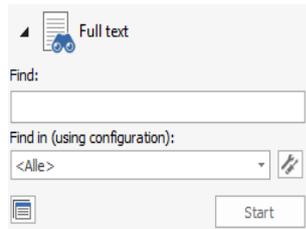


The query is shown on the navigation.

You can shown and hide the form with the arrow.

## Full Text Queries

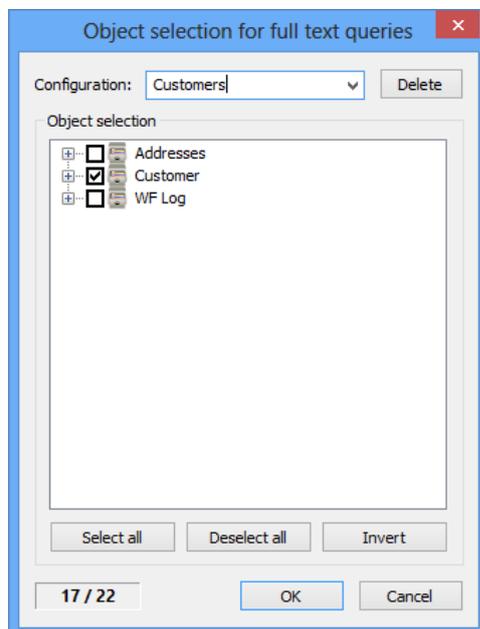
In the context menu of the navigation, the **Add > Full text query** item integrates a full text search form into the navigation.



You can shown and hide the form with the arrow.

Unlike the full text search forms, which you open from the object search, for full text queries, you use the navigation to create configurations for object selection. You then enter search terms and select a configuration during the query.

 Configurations are created via the configuration icon for the object selection.



Name the configuration, select the objects to be searched, and confirm with **OK**.

The configuration is saved and can be selected for the search from the configuration list. Configurations set up here are also available for the full text search from the input field, right on the ribbon.

The configuration `<list>` is always available. This configuration links the full text search with each active list, for example the folder content, a hit list, or a portfolio.

The configuration `<all>` applies the full text query to all objects.

## Annotations on Layers

You can add annotations to image documents in the document display window. Annotations are organized on layers.

Annotations on layers can only be created and edited when no other user is editing the document. If another user has edited annotations and saved them, while you were also working on them at the same time, you cannot save your changes.

### Access rights and system roles for layers

You can create personal layers. Personal layers can only be accessed by you.

If authorized by the administrator, you can create group layers and public layers.

There may be layers which you can see but neither hide nor edit.

Access rights and system roles are assigned by our administrator. enaio® can be configured so that references to image files that you might receive by e-mail, for example, can be opened immediately with the enabled layer administration.

These kinds of layers can be created:

**Private layers** You can show, hide, and, edit and delete your private layers.

**Static group layers** These layers are only visible to users of a specified group. Users who have the right to create group layers can hide, show, and edit those which they have created.

Users which also have the 'Other users' static layers' system role can hide, display, delete, and edit all group layers.

**Dynamic group layers** These layers are visible to all users of a specified group. All users can edit, hide, show and delete them.

They can only be created by users who have the right to create group layers.

**Static public layers** These layers are visible to all users.

Users who have the right to create public layers can hide, show, edit, and delete layers which they have created themselves

Users which also have the 'Other users' static layers' system role can hide, display, delete, and edit all group layers.

**Dynamic public layers** These layers are visible to all users. All users can edit, hide, show and delete them.

They can only be created by users who have the right to create public layers.

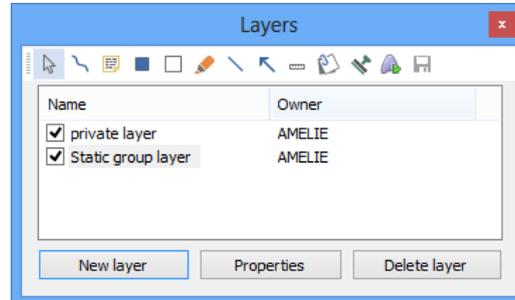
Annotations on layers are not included in document versions in the history. There, documents are always displayed with the layers of the current version.

### Creating Layers

You can create group layers and public layers only if authorized to do so by the administrator.

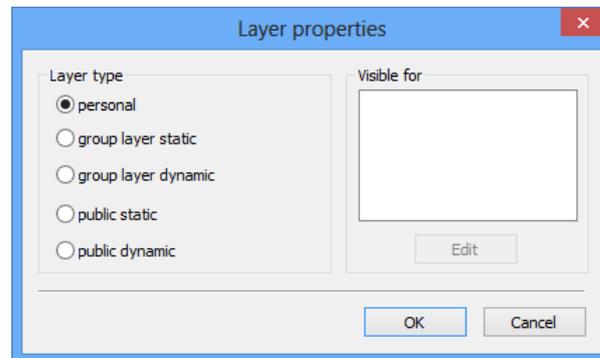
Follow these steps to create a layer with annotations:

1. Open an image document in the document display window (see 'Document Display Window').
2.  Open the document's annotations window using the **Annotations** button. The **Annotations** window will open.

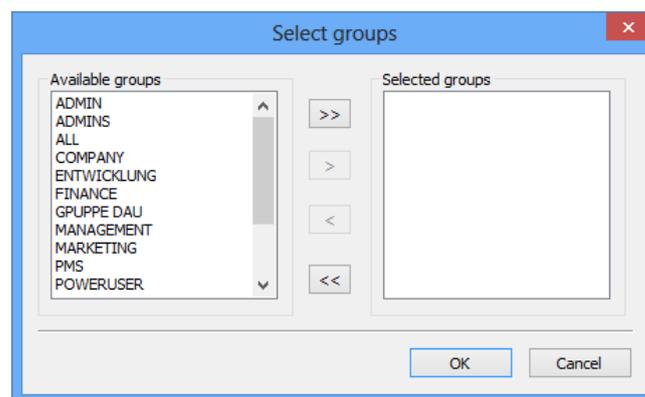


Any layers containing annotations are listed.

3. Click the **New layer** button. The **Properties for layers** window will open.



4. Select the **Layer type** (see 'Annotations on Layers'). Select a group layer and click **Modify**. The **Select groups** window will open.



5. Select one or more groups. Use the arrows to move them to the **Selected groups** field.
6. Click **OK** or press **ENTER**.

The **Layer properties** window will open again.

7. Click **OK** or press **ENTER**.

® The layer will be created, shown, and selected in the **Annotations** window. You can create annotations for layers (see 'Creating Annotations for a Layer').

### Creating Annotations for a Layer

The annotations you create on a layer can comprise freehand lines, texts, filled rectangles, rectangles, marks from highlighters, lines, arrows, rulers, notes, rubber stamps, and buttons which you can use to create links and start a program.

For the design of annotations, the entries from the settings (see 'Annotations'Area') are selected. You can change the design of your annotations.

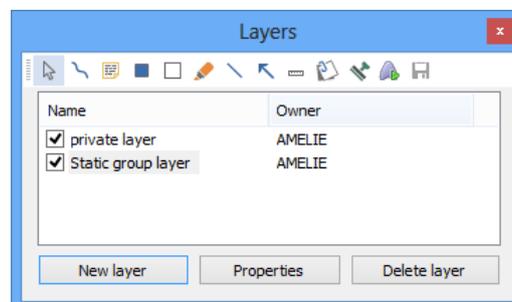
Documents which are intended for having annotations appended must not be rotated in the document display window. The position of an annotation is always relative to the orientation of the saved document, not relative to the new, rotated position.

Follow these steps to create an annotation on a layer:

1. Open an image document in the document display window (see 'Document Display Window').

2.  Open the document's annotations window using the **Annotations** button.

The **Annotations** window will open.



Any layers containing annotations are listed.

3. Select a layer or create a new one (see 'Creating Layers').

4. Select one of these tools from the toolbar (see 'Tools for Annotations'):

**Freehand line, text, filled rectangle, rectangle, highlighter, line, arrow, ruler, note, stamp or link/start application.**

5. Use the tools to create annotations in the document display window.

6.  Save the annotations via the **Save** button.

® The annotations are saved on the layers and displayed in the document display window.

## Tools for Annotations

You can select from the following tools to create annotations:



### Freehand line

Drag with the mouse to create a line.

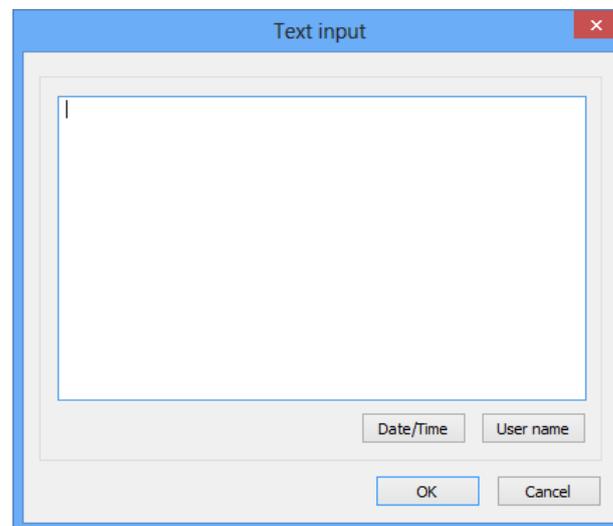
With the **Freehand line settings** item in the context menu of the line, you can modify the settings **Name**, **Line**, **Grid link**, **Foreground color**, **Dots**, and **Hyperlink** (see 'Annotation Settings').

Freehand lines contain connection points with which you can edit them.



### Text

Use your mouse to draw a rectangle. The **Text input** window will open.



Enter your text. By clicking the buttons, you can add the current date and time or your user name to the text. Use **CTRL+ENTER** to enter a line break.

Close the **Text input** window by clicking **OK**. After confirming the text by pressing **ENTER**, you can use the **Text settings** item from the context menu to edit settings such as **Name**, **Line**, **Fill**, **Foreground color**, **Background color**, **Font**, **Text**, and **Hyperlink**.

You can now edit the annotation (see 'Editing Annotations').

The '#' character is interpreted as control character by the annotation module and must not be used.



### Filled rectangle

Use your mouse to draw a rectangle.

With the **Filled rectangle settings** item from the rectangle's context menu you can change the settings **Name**, **Background color**, and **Hyperlink**. Under **View > Settings > Annotations** you can select the preset color of the filled rectangle.

You can now edit the annotation (see Editing Annotations).



### Rectangle

Use your mouse to draw a rectangle.

In the **Rectangle settings** from the context menu of the rectangle, you can change the settings **Name**, **Line**, **Grid link**, **Fill**, **Foreground color**, **Background color**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).



### Highlighter

The highlighter is equivalent to a filled rectangle.

Use your mouse to draw a rectangle.

With the **Highlighter settings** item in the context menu, you can edit the settings **Name**, **Background color**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).



### Line

Drag with the mouse to create a line.

With the **Line settings** entry in the context menu of the line you can edit the **Name**, **Line**, **Grid link**, **Foreground color**, and **Hyperlink** settings.

You can now edit the annotation (see Editing Annotations).



### Arrow

Drag with the mouse to create a line. The tip of the arrow will be at the beginning of the line.

With the **Arrow settings** entry from the context menu, you can edit the settings **Name**, **Line**, **Grid link**, **Foreground color**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).



### Ruler

Drag with the mouse to create a line. The length of the line will be calculated and displayed at the end of the line. Drag with the mouse to create a line.

From the **Ruler settings** entry in the context menu for the ruler, you can edit the settings **Name**, **Line**, **Grid link**, **Fill**, **Foreground color**, **Background color**, **Font**, **Ruler**, and **Hyperlink**.

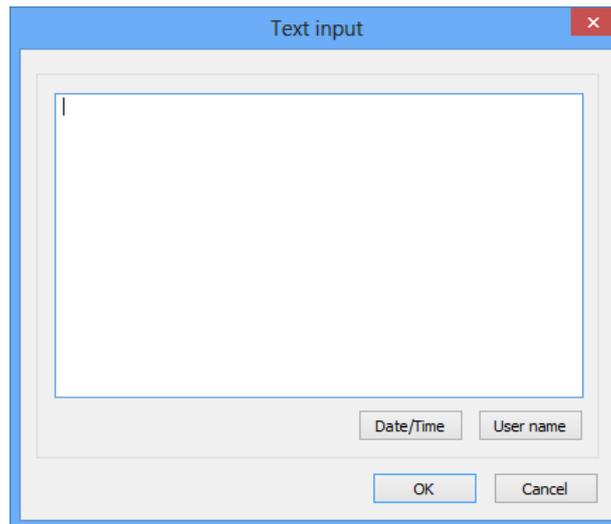
You can now edit the annotation (see Editing Annotations).



### Note

Unlike a **Text**, a **Note** cannot have a transparent background.

Use your mouse to draw a rectangle. The **Text input** window will open.



Enter the text of the note. By clicking the buttons, you can add the current date and time or your user name to the text. Use **CTRL+ENTER** to enter a line break.

With the **Note settings** item in the context menu, you can edit the settings **Name**, **Foreground color**, **Background color**, **Font**, **Text**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).

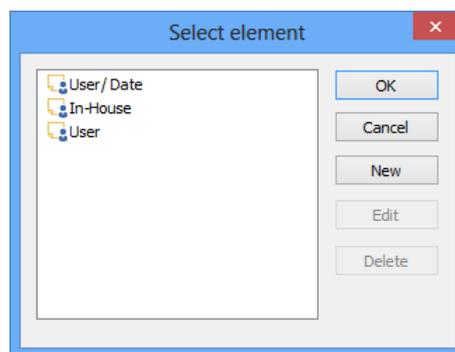
The '#' character is interpreted as control character by the annotation module and must not be used.



## Stamp

The stamp allows you to add boilerplate text to a layer.

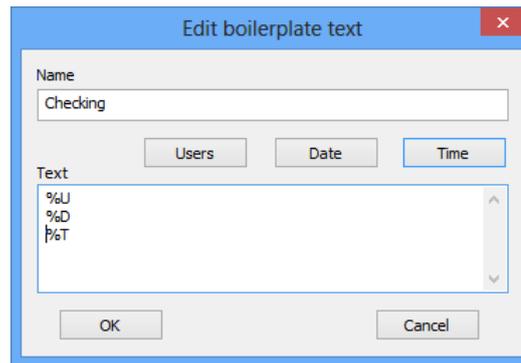
Use your mouse to draw a rectangle. The **Select boilerplate** window will open.



 Boilerplates provided to you via a profile cannot be edited.

Select an existing boilerplate or create a new one:

Click on the **New** button. The **Edit boilerplate** window will open.



Enter a name and a text. By clicking the buttons, you can add the current date and time or your user name to the text. Use **CTRL+ENTER** to enter a line break.

With the **Text settings** item of the context menu, you can edit the settings **Name**, **Line**, **Fill**, **Foreground color**, **Background color**, **Font**, **Text**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).

The '#' character is interpreted as control character by the annotation module and must not be used.



### Link

You can create links to external programs or Internet pages with a button.

Use your mouse to draw a rectangle.

Using the **Settings button** from the context menu of the button, you edit the settings **Name**, **Fill**, **Foreground color**, **Background color**, **Font**, **Text**, and **Hyperlink**.

You can now edit the annotation (see Editing Annotations).

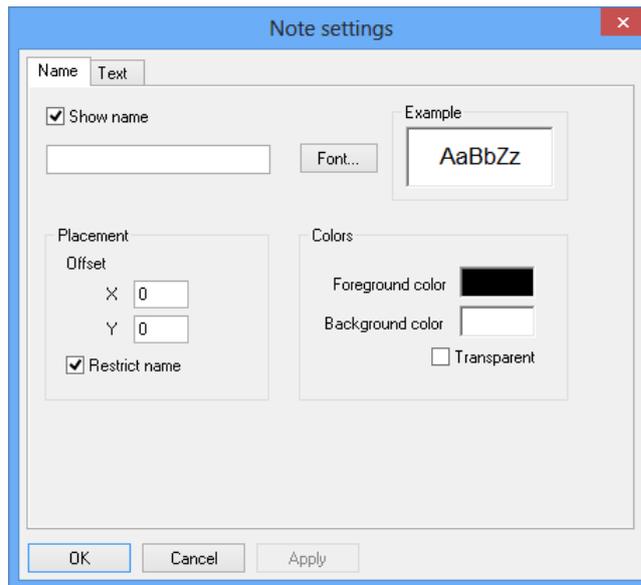
## Annotation Settings

When you create annotations on a layer, the settings, for example of colors and line width, are taken from the 'Annotations' area.

To change the settings for an annotation, open the context menu of the annotation. Depending on the type of annotation, you will find the following options in the **Settings** item:

### Name

Annotations can be given a name, which can be displayed.



### Line

You can select the line width and style for freehand lines, rectangles, lines, arrows and the ruler.

The line width is entered in the **Width (points)** field, the line style is selected from the **Style** list.



### Grid link

You can decide how the line colors and the background color of the annotations relate to the color of the document. You can choose between **copy (normal)**, and **(highlight)**, and **XOR (invert)**.

### Fill

You can choose the background of texts, stamps, and rectangles. **Mode:** You choose whether the background appears transparent, translucent, or opaque. **Pattern:** Select a texture to be shown in the foreground color.

### Foreground color

Select a foreground color, e.g. for text and lines.

### Background color

Select a background color, e.g. for the filled rectangle, the stamp, and the text elements.

### Font

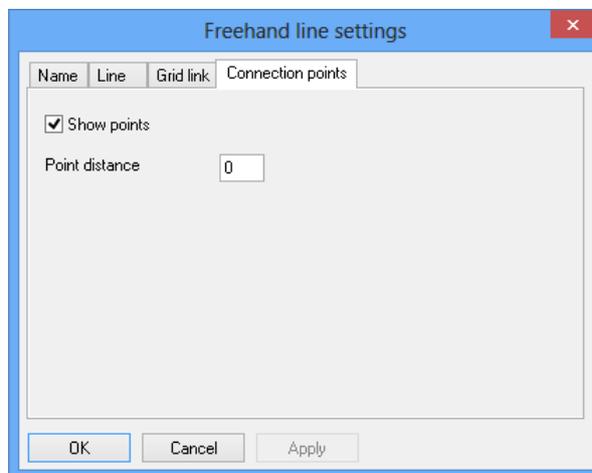
Select a font, style and style size for texts, notes, buttons and stamps.

### Ruler

Set the units in the **Measurement units** field, the number of digits beyond the decimal point is set in the **Precision** field, and the length of the ruler's page limits is set in the **Gauge mark** field. Also set the length of the **Tick marks** between the page limits.

### Points

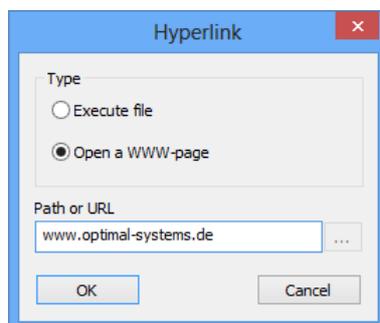
For freehand lines, you can use the **Dots** context menu to select the distance between the sizing handles and whether they will be visible.



### Hyperlink

You can add hyperlinks to all annotations.

Enter the path to an executable file or the URL of a website.



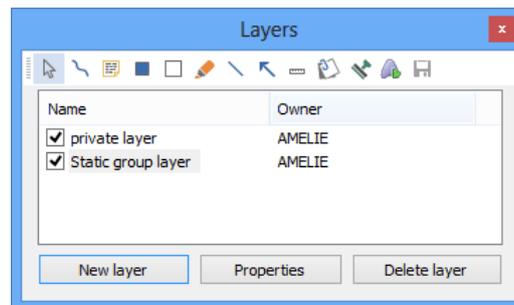
### Edit annotations

You can edit the annotations on your private layers and - depending on the rights the administrator has granted you - also those on public and group layers.

A document for which you create annotations on a layer must not be rotated in the document display window. The position of an annotation is always relative to the orientation of the saved document, not relative to the new, rotated position.

Follow these steps to edit annotations:

1.  In the document display window click on the **Annotations** button. The **Annotations** window will open.



The existing layers are listed.

2. On the **Annotations** window, select the layer whose annotations you wish to edit. If necessary, hide other layers for a better overview (see 'Showing and Hiding Layers').
3.  Click the **Select** button to switch the selection mode on.
4. Select an annotation in the document display window.
 

Sizing handles will appear at the corners of the annotation.

If one annotation is covered by another, use the **Send to back** feature in the context menu to move the annotation to the background of the layer.

You can move the annotations by dragging with the mouse and use the sizing handles to enlarge or minimize the annotations window.

With the **'Tool' settings** item in the annotation's context menu, you can edit the annotation design (see "Annotation Settings").
5.  After editing, save the annotations by pressing the **Save** button.

There are more options for editing an annotation in its context menu:

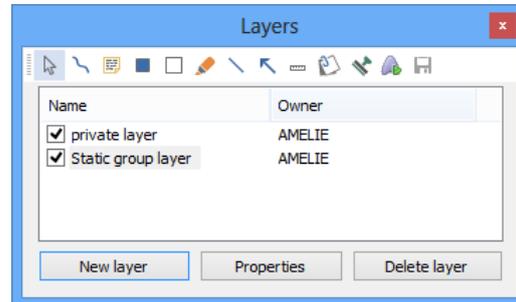
- Delete** The selected annotation is deleted.
- Bring to front** The selected annotation is moved to the foreground.
- Send to back** The selected annotation is moved to the background.

### Showing and Hiding Layers

You can hide static group layers and static public layers only if the administrator has granted you this right.

Follow these steps to show or hide layers on a document in the display window:

1. In the document display window click on the **Annotations** button.  
The **Annotations** window will open.



The check box is selected on shown layers and deselected on hidden layers.

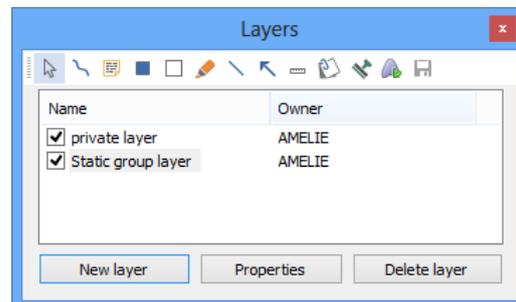
2. Check or uncheck the check box to hide or show layers.

### Editing Layers

You can edit your personal layers and, depending on the rights given to you by the administrator, also public and group layers.

Follow these steps to edit layers:

1. In the document display window click on the **Annotations** button.  
The **Annotations** window will open.



The existing layers are listed. Displayed layers are marked with a checkmark (see 'Showing and Hiding Layers').

With the buttons at the bottom of the window, you can create a new layer (see 'Creating Layers'), change the properties of a selected layer, or delete a selected layer.

2. Open the context menu by right-clicking a layer in the document display window.

The context menu contains the following items:

- |                       |   |
|-----------------------|---|
| <b>Delete</b>         | The layer is deleted.                   |
| <b>Bring to front</b> | The layer is moved into the foreground. |
| <b>Send to back</b>   | The layer is moved into the background. |

### Default Settings

Here you specify the default settings for all annotations.



Save all changes to the layer using the **Save** button.

® The edited layer is saved.

## Printing Layers

Layers which cannot be edited will be printed as well.

If you want to print layers which can be edited, open the document in the display window and the print dialog with the keyboard shortcut **ALT+P**. In the print dialog, select the **Print annotations** option.

## enaio® sync

enaio® sync is an optional enaio® component which enables access to favorites via Windows Explorer. The favorites are copied to the file system and can be edited. Modified files are sent back to enaio® by enaio® sync.

enaio® sync can also be installed at workstations where enaio® client has not been installed. Installation and configuration take place at administration level.

### Favorites in Windows Explorer

enaio® sync creates the folder `enaio` in the user-specific folder `...\user\. A link to this folder is created in the navigation area of the explorer under the favorites.`

All documents, folders, and registers from enaio® favorites are copied there.

Index data are used to label objects. The ID is also specified.



Folders and registers from enaio® are copied with the content to the file system. In nested structures from folders and registers, all objects are copied up to the 7th level.

If image files contain multiple pages, each page is individually copied and a counter added to the name.

The detail and content preview is integrated via the properties dialog of the file. The detail and content preview can also be shown from the context menu in the browser via the **Show content viewer** function.

The following functions are also found in the context menu:

#### § Open in enaio®

The object is opened in the enaio® client. This function is only available if enaio® client is installed on the workstation.

#### § Send internally

The new e-mail is created in the e-mail application with a reference to the object as attachment.

#### § As PDF to the clipboard

A PDF version of the file is transferred to the clipboard.

#### § Remove from the favorites

The object will be deleted from the file system and removed from the favorites in enaio®.

## Editing Documents

The document files can be opened and edited in the relevant applications.

During synchronization, enaio® sync transfers modified files to enaio®.

The following data cannot be edited:

#### § Index data

Index data is shown in the details preview and cannot be edited.

#### § Locations

If you move document files in the file system within the favorites, the document files in question can no longer be synchronized.

#### § File names

If you change folder or file names, the document files in question can no longer be synchronized.

The deletion of objects has no impact on enaio®. Objects are copied again the next time synchronization takes place.

## Synchronize

enaio® sync synchronizes the document files every 5 minutes by default. The frequency can be changed at administration level. The enaio® sync icon in the info area of the task bar enables synchronization to be carried out and paused directly.

The following data is synchronized:

#### § Favorites

New favorites and favorites deleted or moved in the Explorer, are copied.

#### § Document Files

Modified document files are transferred to enaio®.

enaio® checks whether the modifications can be saved:

§If the document file was modified by a different user, you will be notified of this. You can reject the change or specify that the document file should still be used.

§If the document is a W-Document, the document file can be transferred as a variant.

## Office Add-In

In Microsoft Office – Word, Excel, PowerPoint – the enaio® Office add-in can be incorporated, which incorporates the 'enaio' group there in the ribbon on the START tab.

The functions are only active when enaio® client is running.

Functions of the add-in:

<b>Create new</b>	The document will be created in enaio®. In enaio® client, you select from the list of opened folders or registers the desired location, select the document type, and index the document.
<b>Save and check in</b>	The checked-out document is saved, checked in, and closed in Microsoft Office.
<b>Cancel editing</b>	The checked-out document is checked in again without modifications and closed in Microsoft Office.
<b>Data transfer</b>	Data transfer is performed for the checked-out document.

enaio® Office add-in is an alternative to enaio® office-utilities, which have considerably more functions and which can be comprehensively configured. Both components can be simultaneously enabled at the workstation and in Microsoft Office. Components can be enabled/disabled via the add-in administration of Microsoft Office.

## Outlook Add-In

In Microsoft Outlook, the enaio® Office add-in can be incorporated, which incorporates there the 'enaio' groups and 'create in enaio' in the ribbon on the START tab.

The functions are only active when enaio® client is running.

Functions of the add-in:

<b>In the current location</b>	The selected e-mails are created at the currently opened location in enaio® client.
<b>User-defined</b>	List with your user-defined locations from which you can select the desired location.

<b>Current locations</b>	List with all opened folders and registers from which you can select the desired location. A maximum of 10 locations will be offered.
<b>Last locations</b>	List with all locations last selected, from which you can select the desired location. A maximum of 10 locations will be offered.
<b>Open location</b>	For an e-mail already created in enaio®, the location can be opened in enaio® client.

The enaio® Outlook add-in is an alternative to enaio@ document-storage by which e-mails can be imported using comprehensive configuration options. Both components can be simultaneously enabled at the workstation and in Microsoft Outlook. Components can be enabled/disabled via the add-in administration in Microsoft Outlook.

### Creating User-Defined Locations

Via the arrow in the 'create in enaio' group, you open the configuration dialog for user-defined locations.



Via **New** you add the location currently open in enaio® client to the list of user-defined locations.

The name can be adjusted via the configuration icon at the end of the line; a user-defined location can be deleted again using the delete icon. A maximum of 10 locations are possible.

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