## **SENTRY***FILE*

### Version 3



### **User's Manual**

Version 3.2

T	Table Of Contents	
*	Table Of Contents	2
	Signing On	4
F	SentryFile Interface	6
2	HomePage	7
<u> P</u>	Searching For Documents	9
	Quick Search	
	Index Search	12
	Full-Text Search	14
	Browse	
-	Results Display	16
T	Viewing Documents	
	Save To Disk	
	Annotations	21
	Email	23
	Append	24
	Delete	
	Modify	
	Save To Bookshelf	

## SENTRYFILE

	-W		
	A	Saved Searches	
	Uploadin	g Documents	
		Upload (Softcopy)	
	4	Scan & Upload (Hardcopy)	
P	Managen	nent	
	2	Global Options	40
		Cabinets	
	<u>e</u>	Groups	
	Ś	Users	
		Rights	
		Messages	46
	2	Recycle Bin	47
		Server	
		Sign Out	

## 🖏 Signing On

The SentryFile "Sign On" screen allows users to sign into the system (shown below).

Administrator's must provide each user with a username and password to access the

system.



Some SentryFile administrators will choose to use the integrated Windows NT/2000 userlist. In this case, the user will be prompted for a username, password and domain as shown below.

Enter Net	work Passwor	d	? ×
?	Please type yo	ur user name and password.	
	Site:	www.sentryhle.com	
	<u>U</u> ser Name		
	<u>P</u> assword		
	<u>D</u> omain		
	$\square$ Save this p	assword in your password list	
		OK Car	icel

The username, password and domain will typically be identical to those used when logging onto Windows.

#### SENTRYFILE USER'S MANUAL



The SentryFile interface is designed in 3 sections. At the top of the screen is a listing of system sections that you can access. On the left side of the screen is a listing of the functions that you can perform within each system section. The main area of the screen is where all content is displayed.

🚰 SentryFile - Microsoft Internet	Explorer		_ 8 ×
File Edit View Favorites To	iols Help		10
🗢 Back 🔹 🤿 🗸 🔯	📺 Personal Bar 🛛 Search 👔 Favorites 🍏 🖏 - 🎒 👿 - 🗏	\$\$ B	
		Saturday, Ju	ne 01, 2002
			8
SENTRIFILE	Home Search Upload	Management Help	यन्। २ Sian Out
~			-
<b>I</b>	System Messages	and the second of the	
My Homepage	Welcome to SentryFile - Web-Based	Document Management. This is	
	Saturday, June 01, 2002 a sample system message. System to communicate information to users	messages allow administrators s.	
	Personal Bookshelf	and the first	
	Frequently Used Document	🧈 View 🕨 🛛 🔕	
	Frequently Used Spreadsheet	🧇 View 🕨 🛛 🔇	
	Saved Searches		
	My Favorite Search	🏚 Search 🕨 ( 🕄	
Ø] Done		🚟 Local intra	anet

Navigate through the site using both the system sections and system functions frames.

Prompts will be displayed in the content frame.

### У HomePage

After a user logs into SentryFile the user's personal "Homepage" is displayed. The

🖉 SentryFile - Microsoft Internet Expl - 8 × Edit View Favorites Tools Help File 🗢 Back 🔹 🤿 🖉 🙆 🏠 🛅 Personal Bar 📿 Search 🔝 Favorites 🧭 🔩 🛥 🎒 🐨 🗉 🏶 🗟 rday, June 01, 2002 rE) P 稐 SENTRYFILE 9 My Homepage Welcome to SentryFile - Web-Based Document Management. This i a sample system message. System messages allow administrators 🚺 Saturday, June 01, 2002 to communicate information to users Frequently Used Document 🧈 View ) 🧈 View 🕨 Frequently Used Spreadsheet 8 My Favorite Search 👪 Search 🕨 0 . 🥔 Done 📑 Local intranet

homepage acts as a starting point for all user sessions.

Available to the user is a listing of system messages posted by the system administrator. System messages help to keep users informed of information from the administrator.

The Personal Bookshelf is the location where users can save their most frequently used documents for quick retrieval at a later time. Items listed in the Personal Bookshelf can be retrieved by simply clicking the "View" icon. Users can manage their own Personal Bookshelf. Use the red "X" icon to delete an item from your Personal Bookshelf.

The Saved Searches listing is the location where users can save their most frequently performed searches for quick access later. Saved Searches are very similar to the Personal Bookshelf however, a Saved Search stores a set of search parameters, and not a single document. Users can perform a Saved Search again by simply clicking on the "Search" icon.

More will be discussed later about adding documents to your Personal Bookshelf and saving your search parameters as a Saved Search.

## Searching For Documents

Searching for documents can be access by clicking the "Search" icon along the top system sections frame. This will display the list of search types in the left frame. By default the "Quick Search" is displayed in the content area. Users can select a different type of search by clicking the appropriate icon on the left frame.

							COMMENT	
SentryFile - Microsoft Ir	nternet Explor	er						
File Edit View Favori	rites Tools H	Help						
] 🗇 Back 🔹 🤿 👻 🙋	🖞 🖓 🔳 🔳 Pe	rsonal Bar 🛛 🧿 Search	😹 Favorites	- 🎯   🖏 - 🤅	🗿 🔟 - E	\$\$ B		
Address 🥙 http://localhost/	/current/sentryfil	eweb/default.asp						▼ @Go
							Monday, Ju	ly 29, 2002
Charles The Contract				AA		C	D.	<b>(2</b>
SENTRYFIL	E		<b>N</b>	848		F	<b>V</b>	U.V.
		and the second second	Home	Search	Upload	Management	Help	Sign Out
A-3				QUICK Sear	CII			
	_							
Quick Search			4 Sar 1	Quick Sear	rch	The second	and the	
		Cabinet:	Chris's Cab	inet 💌				
		Keyword(s):						
Index Search			P				Casuah	
							Search	
da -								
l Line and								
Full-Text Search								
Browse								
Done							🔐 Local intra	net

## 🗳 Quick Search

The Quick Search is the convenient and simple method to search for documents. The Quick Search allows you to enter keywords, all records that contain matching keywords within the text based fields of the index data will be displayed. This is an extremely effective way to find most files within the system.

To use the Quick Search you must first select a cabinet to search through. Click the "down arrow" beside the "Cabinet" drop down list. Next, you must define your search parameters. Enter your search parameters into the "keywords" field. Lastly, click the "Search" button to perform the search. See sample below:



Once you click the "Search" button the system will generate your search results and display them in the content frame. See below:

#### **SENTRY***FILE*

#### **USER'S MANUAL**

🚳 SentryFile - Microsoft In	ternet Explorer	_ 8 ×
File Edit View Favori	tes Tools Help	
] 🕁 Back 🔹 🤿 🖉 🙋	) 🔏 📺 Personal Bar 🔇 Search 👔 Favorites 🦪 🖏 - 🎒 👿 - 📑 🏶 😼	
Address 🙋 http://localhost/	current/sentryfileweb/default.asp	🔻 🤣 Go
		Monday, July 29, 2002
SENTRYFIL		Help Sign Out
	Search Results	neip sign out
A.		
Quick Search	Record 1 <u>View Document</u> Save To Disk Annotations Email Delete	Modify
	Company ABC Corporation	
	Description Marketing Firm	
<b>1</b>	File Name doc.tif 🛛 💙 Save To Bookshelf as:	Save
Index Search	1 desument found	
d	i docament round.	
	Save This Search	
Full-Text Search	Save This Search as: Save 🛛	
Browse		
Ø Done		📆 Local intranet

### M Index Search

The Index Search is the most powerful method of searching for documents. All documents within SentryFile are assigned "index data" when they are uploaded to the system. The Index Search allows you to find documents based on the "index data" for the documents.

To use the Index Search you must first select a cabinet to search through. Click the "down arrow" beside the "Choose Cabinet" drop down list. When you choose a different Cabinet the index fields displayed will change to those for the selected Cabinet. Next, you must define your search parameters. You may enter as little or as much information into the search form as you like. The more data you enter, the more concise your results will be. Fill in search parameters into the index fields to formulate your search. Then, you can choose how your results will be sorted. Choose the field that you would like to use to sort your results, and choose wether you would like the results in ascending or descending order. Lastly, click the "Search" button to perform the search. See sample below:

#### SENTRY FILE

#### **USER'S MANUAL**

SentryFile - Microsoft Internet Ex File Edit View Favorites Tool	plorer s Help				_ & ×
_ ] ← Back • → • 🔕 🗗 🚮 🔲	Personal Bar 🛛 🧟 Search	🛞 Favo	ites 🎯 🖏 - 🖨 👿 - E		
SENTRYFILE		Home	Search Upload	Saturday, : Management Help	June 01, 2002
			Index Search		
Index Search	Choose Cabinet: Cust	omer Rec	ords 💌 😮		_
	10 10 10 10 10 10 10 10 10 10 10 10 10 1	Sear	ch Within: Customer Record	ls	
L L L	Customer Name: Cont	ains 💌	ABC	0	
Full-Text Search	Record Type:		Corporation 🔽 😯		
	Filename: Cont-	ains 💌		0	
		0	Sort By: Customer Name 💌	Ascending 💌 Search	
browse					

Once you click the "Search" button the system will generate your search results and

File       Edit       View       Favorites       Tools       Help       Image: Search       Image: Search       Image: Search       Image: Search       Search       Image: Search       Search       Image: Search
↔ Back + → · · · · · · · · · · · · · · · · · ·
SENTRYFILE Nome Search Upload Management Help Sign Out Index Search Results Index Search Results Index Search Results
SENTRYFILE Nome Search Upload Management Help Sign Out Index Search Results
SENTRYFILE
Home Search Upload Management Help Sign Out
Index Search
Record 1 View Document Save To Disk Annotations Email Append Delete Modity
Customer Name ABC Corporation
Record Type Corporation
File Name simulated_scan.pdf Save To Bookshelf as: Save
Record 2 View Document Save To Disk Annotations Email Delete Modify
Customer Name Public School
Browse Record type Education
File Name system_requirements.coc  Save To Bookshelf as: Save
Record 3 <u>View Document</u> Save To Disk Annotations Email Append Delete Modify
Customer Name SentryFile
Record Type Corporation
File Name sentryfile_brochure.pdf 🚱 Save To Bookshelf as: Save
3 documents found.
Save This Search
Save This Search as: Save 🔮
이 이번 Local intranet

display them in the content frame. See below:

## Full-Text Search

Full-Text Search allows you to search for documents based on the text within the documents. Not all file formats are supported for full-text searching. Typically Microsoft Office documents such as Word, Excel, Powerpoint are supported along with Adobe Acrobat PDF files. Also, more generic files formats are also support such as plain text files (.TXT) and Web Pages (.HTML).

To perform a Full-Text Search first click the "Full-Text Search" icon on the left frame. This will load the Full-Text Search form. Next, choose the cabinet that you would like to search by using the Cabinet drop down box. Enter the keywords that you would like to locate and press the "Search" button.

🎒 SentryFile - Microsoft In	ternet Explorer			_ 8 ×
File Edit View Favorit	ites Tools Help			10 A
🕁 Back 🔹 🤿 🖌 🙆	) 🖄 🔲 Thersonal Bar 🏼 📿 Search	💽 Favorites 🧭 🗳 🖉 🔹	E # B	
			Saturda	y, June 01, 2002
SENTRYFIL	F	N 🙌 💷	) (	<b>\$</b>
		Home Search Upload	Management Help	Sign Out
		Full-Text Search		
Index Search		Full Text Search		
ch	Cabinet:	Customer Records		
ų,	Keyword(s):			
Full-Text Search			Searc	<sup>sh</sup>
Browse				
🕗 Done			🗮 Loca	al intranet

The results are displayed in a similar fashion as the Index Search shown earlier.

### Browse

Browse allows you to display a complete listing of all the documents stored within a Cabinet. There a only a few parameter that you must select to Browse a Cabinet. First, you must select the Cabinet from the "Choose Cabinet" drop down box. Then select the sort options and click the "Search" button to display the contents of the Cabinet.



The results are displayed in a similar fashion as the Index Search and Full-Text Search shown earlier

# results Display

No matter which search method you use, the results display is always the same. Each document is listed with a "Record Number" attribute. Next to the "Record Number" is a listing of operations that you can perform on/with this document. There can be up to 7 different operations depending on the rights that you have been given. Below the operations bar is the index data for the document. The bottom bar shows the filename of the document and allows you to add the document to your Personal Bookshelf (more on this later).

SentryFile - Microsoft Internet Explorer
File Edit View Favorites Tools Help
😓 Back 🔹 🤿 🖉 🔯 🚮 📺 Personal Bar 📿 Search 🝙 Favorites 🧭 🖏 - 🎒 🐷 🗸 🗒 🖏
Saturday, June 01, 2
SENTRYFILE
nome search opposit wanagement nep sign o Index Search Results
Index Search Search Search Search Cours To Nich Associations, Social Association Marine
Record 1 <u>View Document Save To Disk Annotations Email Append Delete Modity</u>
Record Type Corroration
File Name simulated scan ndf Save Ta Baskakak av
Full-Text Search
Record 2 View Document Save To Disk Annotations Email Delete Modify
Customer Name Public School
Browse Record Type Education
File Name system_requirements.doc 🛛 😯 Save To Bookshelf as: Save
Record 3 <u>View Document</u> Save To Disk Annotations Email Append Delete Modify
Customer Name SentryFile
rile ivame sentrylite_orocnure.por V Save To Bookshelt as:
3 documents found
Save This Search
Save This Search as: Save 🚱

At the bottom of each screen there is a summary showing how many documents were found. If there were more than 10 documents found there would also be a "Next" button to allow you to view the rest of the results.

Below the summary is the "Save This Search" feature. This allows you to store the

search parameters for quick access (more on this later).



To view a document simply click the "View Document" link along the operations bar

for the current record.



If the document is capable of being displayed within the web browser then it will open in the content frame. See below



To get back to your results just click the "Back to Results" arrow icon that appeared in the left frame. If the document you selected is not capable of being viewed within the web browse then a "Save File" dialog box will appear. You can either choose to open the file immediately or save the file to disk and open it later.

SENTRY*FIL* 



Typical documents that can be viewed within the browser are Acrobat PDF, TIF, Word DOC, Excel XLS, Powerpoint PPT, plain text TXT, web pages HTML.



The Save To Disk feature allows you to download a file to your local computer. This will avoid having the file open within the web browser.



This is useful if you would like to save a PDF file to your local computer.



The file you download will need to be opened later with a compatible application.



Annotations allow you to make quick notes about documents within the system. To access the annotation for a documents simply click the "Annotations" link along the top functions bar for the document.



The Annotations are displayed in a list format along with the date the annotation was created and which user posted the annotation. You can add additional annotation by clicking the white "+" icon along the top of the page. This will display the field where you can enter the annotation. Click the "Add Note" button to add the annotation to the system. (see below)

#### SENTRY FILE

#### **USER'S MANUAL**





The Email function allows you to email a document directly to someone without having to attach the document to a message in your email client.



Click the "Email" link along the top operations bar to display the email form. Then fill in the Recipients email address, your email address, a subject, and a message. Click the "Send" button to send the file along with your message.





The Append feature allow you to add additional pages to the current document. The document must be a PDF file for this operation to be available. You can append a PDF file or a TIF file to the current document.



Click the Append link to bring up the append pages form.

![](_page_23_Picture_5.jpeg)

You can either choose an exiting file by clicking the "Browse" button, or scan a new file by clicking the "Scan" Button on the scanner ActiveX interface. If you select and

existing TIF document, click the "Preview" button to load the file in the scanner ActiveX interface. This will allow you to clean the pages before appending.

Once you are happy with the pages click the "Append Document" button to upload the

pages to the system and automatically append them to the existing document.

![](_page_25_Picture_1.jpeg)

The delete function allows you to remove documents from the system. The Delete operations work very much like deleting files in the Windows operating system. When you click the Delete link the document is inserted into the "Recycle Bin".

SentryFile - Microsoft In	sternet Explorer	- 8 2
File Edit View Favorit	ites Tools Help	
🗧 🕁 Back 🔹 🔿 🖌 🙆 💋	] 🚮 🔲 Personal Bar 🔍 Search 💿 Favorites 🧭 🖏 🚽 🗃 🐨 🖃 🏶 🖏	
	Saturda	y, June 01, 2002
SENTRYFIL	e 🔍 🛤 🖷 🔑 🤌	
	Home Search Upload Management Help	Sign Out
		i
Index Search	Record 1 View Document Save To Disk Annotations Email Append Delete M	iodify
	Customer Name ABC Corporation	
Ŵn	Record Type Corporation	
Full-Text Search	File Name simulated_scan.pdf 2 Save To Bookshelf as:	Save
	Record 2 <u>View Document</u> Save To Disk Annotations Email Delete Modify	
	Customer Name Public School	
Browse	Record Type Education	
	File Name system_requirements.doc 🛛 😧 Save To Bookshelf as:	Save
	Record 3 View Document Save To Disk Annotations Email Append Delete M	lodify
	Customer Name SentryFile	
	Record Type Corporation	
	File Name sentryfile_brochure.pdf 🛛 🚱 Save To Bookshelf as:	Save
	- 3 documents found.	
	Save This Search	-
	Save This Search as: Save 🚱	
1	(Hereita)	al intranet

To delete a document simply click the Delete link. You will be prompted to ensure that you want to delete the file. If you accept, you will be given a message informing you that the document has been added to the Recycle Bin.

![](_page_25_Picture_5.jpeg)

#### SENTRYFILE USER'S MANUAL

![](_page_27_Picture_1.jpeg)

The Modify operation allows you to change the index data for the current document.

To use the modify operation simply click the Modify link.

![](_page_27_Figure_4.jpeg)

This will change the results display so that you can modify the index data for the current document.

![](_page_27_Figure_6.jpeg)

When you have completed your modification of the index data click the "Apply

Modifications" button. Please note that if you modify the value of the field that you are

## SENTRYFILE

using to sort your results the record will move to the appropriate location given the new

values.

![](_page_29_Picture_1.jpeg)

Save To Bookshelf allows you to place document on your Personal Bookshelf. The Personal Bookshelf is the location where users can save their most frequently used documents for quick retrieval at a later time. Items listed in the Personal Bookshelf can be retrieved by simply clicking the "View" icon. Users can manage their own Personal Bookshelf. Use the red "X" icon to delete an item from your Personal Bookshelf.

To add a document to the Personal Bookshelf simply give it a name and click the "Save" button.

![](_page_29_Picture_4.jpeg)

## **\*** Saved Searches

The Saved Searches operation allows you to save your most frequently performed searches for quick access later. Saved Searches are very similar to the Personal Bookshelf however, a Saved Search stores a set of search parameters, and not a single document. Users can perform a Saved Search again by simply clicking on the "Search" icon.

![](_page_30_Figure_3.jpeg)

To Add a Saved Search just give your search a name and click the "Save" button.

### 🔲 Uploading Documents

There are two methods to upload documents into SentryFile. You can either Upload a document you currently have on your computer (softcopy) or you can Scan & Upload paper documents using your Twain Compatible scanner (hardcopy).

You can choose the appropriate method by selecting the icon from the left frame.

![](_page_31_Picture_4.jpeg)

## Upload (Softcopy)

To Upload softcopy choose the Upload icon from the left frame. This will display the

Upload form.

![](_page_32_Picture_4.jpeg)

Choose the "Browse" button to display a "Choose File" dialog box.

![](_page_32_Picture_6.jpeg)

Select the file you would like to upload and click the "Open" button.

SENTRYFILE

You can click the "Preview" button to preview the document within the preview area. Typically, documents that can be previewed are: .pdf (Acrobat PDF), .doc (Microsoft

Word), .ppt (Microsoft Powerpoint) .xls (Microsoft Excel), .html (HTML Web Pages).

![](_page_33_Picture_3.jpeg)

Finally, choose the appropriate Cabinet and set your index data. When complete, click the Upload Document button to insert the document into SentryFile.

![](_page_33_Picture_5.jpeg)

You will be given a confirmation screen to summarize your upload.

![](_page_34_Picture_0.jpeg)

$\Leftrightarrow Back \bullet \Rightarrow \bullet \otimes$	히 凃님 ITE Personal Bar 《 Sea	arch 📾 Favorites 🖽 🗈 - 🚑 🖼 - 🗐 🏶 🖳
Address 1 http://localho	t/sfe5/	، آب
14		Saturday. June 01. 2
SENTRYFI	LE	None Search Upload Management Help Sign O
		Upload Summary
Upload	Upload successfu	I, below are the details of the information inserted into the cabinet.
/	The second second	Upload Summary
<u></u>	Filena	ame sinulated_scan.tif
Scan & Upload	3	Size 17864 bytes
	Content I	ype application/octet-stream
	Record T	vne 36
	1	Post Upload Options
		Convert Document to PDF
		Process Document

TIF documents can be converted to PDF after they have been uploaded. If you would like to convert your TIF file to PDF place a checkmark in the "Convert Document To PDF" box and click "Process Document".

![](_page_34_Picture_3.jpeg)

You will be given a confirmation message to indicate that the conversion to PDF was successful.

## Scan & Upload (Hardcopy)

To Scan & Upload hardcopy documents choose the Scan & Upload icon from the left frame. This will display the scanner ActiveX interface and the upload form.

![](_page_35_Picture_3.jpeg)

Click the "Select Scanner" button to display a list of all installed scanners.

![](_page_35_Picture_5.jpeg)

Select the scanner you would like to use and click the "Select" button.

Next, click the "Scan" button. This will load your Scanner's Interface. Use the interface to scan the documents into the scanner control.

![](_page_36_Picture_0.jpeg)

File Edit View Eavorites	
🛏 Back 🔹 🔿 👻 🔯	☆ EPersonal Bar 《Q Search I Pavorites 《경 타고 + 글 111 11 11 11 11 11 11 11 11 11 11 11
ddress 🙋 http://localhost/sfe	5/ 💌 🖻
	Saturday June 01, 20
SENTRYFILE	Home Search Upload Management Help Sign Ou
<u>, E</u>	Scan & Upload Document
Upload	File: pss 6.0\sentryfiledoc.tif Browse Preview
4	
Scan & Upload	SentryFile - Features/Benefits
	Petatore         Banefit           Completely Web Based         • Familiar environment for most users, very little training required.           Can be accessed/administered anywhere in the world.         • Clinetis can access from almost any operating system.           No clivit orbane for 1f deserment to install         • No clivit orbane for 1f deserment to install
	Per Server Licensing  No limitations on the number of users that can access the system  No limitations on the number of document/cabinets
	PDF Support Converts scanned documents to PDF, extremely familiar to users. Documents can be viewed on almost any platform (with a PDF file viewer)
	Twain Support     Supports Twain-compatible scanners. Currently the largest image acquisition     standard.
	Supports All File Types     Files of any format can be uploaded and stored to the system. This includes     Microsoft Word, Excel, Powerpoint, Audio, Video – any format!
	Modify 'on the Hy'     Email Document     Modify document index field values inline while searching.     Email document directly out of the application, no need to have an email client     installed as the discussed of the second secon
	Recycle Bin • Similar to the Windows "Recycle Bin" allows deleted documents to be "Restored"
	System Messages  Communicate information across all users using the "System Messages"

Use the buttons along the top of the Scanner ActiveX Control to manipulate the document. Features include, delete page, negative image, deskew, despeckle, page rotation, zoom in/out and scan-append pages.

Finally, choose the appropriate Cabinet and set your index data. When complete, click the Upload Document button to insert the document into SentryFile.

![](_page_36_Picture_4.jpeg)

You will be given a confirmation screen to summarize your upload.

![](_page_37_Picture_0.jpeg)

😓 Back 🔹 🔿 🗸 🙆	히 슈니 FE Personal Bar (@) S	Search 📾 Favorites 🖽 🖏 - அ 🐺 - 🗐 🏶 🖳
Address 1 http://localhos	t/sfe5/	
,		Saturday, June 01, 2
SENTRYFI	LE	🔃 👬 🚛 🔎 🧇 👫 Home Search Upload Management Help Sign Or
_		Upload Summary
Upload	Upload success	sful, below are the details of the information inserted into the cabinet.
//	Sec. 1	Upload Summary
<u>_</u>	File	ename simulated_scan.tif
Scan & Upload		Size 17864 bytes
	Customer	It Type application/octet-stream
	Record	d Type 36
		n 1364 an
	100 m 100	Post Upload Options
		Convert Document to PDF
		Process Document

TIF documents can be converted to PDF after they have been uploaded. If you would like to convert your TIF file to PDF place a checkmark in the "Convert Document To PDF" box and click "Process Document".

![](_page_37_Picture_3.jpeg)

You will be given a confirmation message to indicate that the conversion to PDF was successful.

## 🎾 Management

All SentryFile Management can be done through the web browser. Not all users are given acces to the management functions of the system. The Management section allows you to manage Global Options, Cabinets, Users, Groups, Rights, System Messages, Recycle Bin and Server Info.

🚰 SentryFile - Microsoft Internet Explorer			_ & ×
File Edit View Favorites Tools Hel	0		
⇐ Back ▾ ⇒ ▾ 🙆 🙆 🚮 🔲 EPerso	nal Bar 🥘 Search 💿 Favorites 🍏 🖏 🕇	🤳 🖬 • 🗏 🏶 🤒	
Address 🛃 http://localhost/sfe5/			💌 🤗 Go
		Saturday,	June 01, 2002
and the second second	<b>M AA</b>		(Q)
SENTRYFILE	S 14		<b>B</b>
	Home Search Global Ont	Upload Management Help	Sign Out
(2)	ciobal op		
Global Ontions	_		
Cidedai Oparonis	Enable Full Text Search	Apply Changes	
	Enable Process Folders		
	_		
Cabinets	Show License to users logging in		
	License Text:		
Groups			
		×	
lisers	Authentication scheme:		
00010	Internal _		
		Apply Changes	
Rights			
🕗 Done		🛛 🖉 Local	intranet

### 💈 Global Options

Gobal Options are system properties that apply to all users. To access the Global

![](_page_39_Picture_3.jpeg)

![](_page_39_Picture_4.jpeg)

Enable Full-Text Search allows you to Enable/Disable Full-Text Searching for all users. Full-Text Searching can be a server intensive operation and some administrators may prefer to disable it.

Enable Process Folders allows you to Enable/Disable the use of Process Folders. Process Folders are used to integrate third party application into SentryFile. If third party application are not used, it is convenient to disable the Process Folders feature.

Show License to Users Logging in allows you to enable/diable displaying your own corporate privacy policy. The policy can be entered into the "License Text" field.

Authentication Scheme allows you to choose which method SentryFile will use to authenticate users accessing the system. There are two options, they are Internal – uses the built in SentryFile authentication mechanism and Windows NT/2000 where SentryFile will authenticate users against a Windows NT/2000 domain.

### Cabinets

Cabinets allow you to create and manage the Cabinet and index fields within the SentryFile system. "+" icons are used to add Cabinet and Fields, while red "X" icons are used to delete Cabinets and fields. Blue arrow icons are used to modify the names of Cabinets and Fields.

🚰 SentryFile - Microsoft I	nternet Explorer						_ 8 ×
File Edit View Favor	rites Tools Help						-
- 🗢 Back 🔹 🔿 🗸 🙆 💈	👌 🚮 🔲 🔲 Personal Bar 🛛 📿 Search	🜸 Favorites	3 B- 3	) 🗹 - 🗏	#* B		
Address 🙋 http://localhost.	/sfe5/						▼ 🔗 Go
						Saturday, Jur	ne 01, 2002
SENTRYFIL	E	2	<b>#</b>		ø	2	<b>S</b>
		Home	Search	Upload	Management	Help	Sign Out
	🗐 🕁		Cabinets				<u>^</u>
2	Contracts						÷ 🔕 💊
Global Options	Customer ID (Text)						<b>8</b> 🖓
	Contract Date (Date)						🛛 🖓
<u>-</u>	Contract Type (Lookup Field)						+ 🙆 💊
Cabinets	-> Equipment Lease					🔕 🖎	
	> Rental					🔕 🖎	
<u>.</u>	> Service Contract					🔕 🖎	
22	📰 Customer Records						🕈 🙆 🖓
Groups	📁 Customer Name (Text)						🛛 🖓
	💭 Record Type (Lookup Field)						e 🔕 🖓
	-> Corporation					8 🖓	
Users	> Education					8 🖓	
	> Government					80	
	→ Non-Profit					8 🖓	
	Supplier Records						4 <b>0</b> C
Rights	Supplier Name (Text)						
	P Supplier Type (Lookup Field)						e 👩 🗘
	Equipment						-
🛃 Done						🔠 Local intra	net

![](_page_42_Picture_1.jpeg)

![](_page_42_Picture_2.jpeg)

Groups allows you to manage the groups and group members within SentryFile.

Groups can have a variety of permissions to access various parts of the Managements area. The permissions include Global Options, Add Cabinets, Manage Groups, Manage Users, Manage Rights, Manage System Messages, View Server Info. "+" icons are used to add Groups and add users to a group, while red "X" icons are used to remove a group or remove a user from a group. Blue arrow icons are used to modify the permissions of the group.

![](_page_43_Picture_1.jpeg)

![](_page_43_Picture_2.jpeg)

Users allows you to manage the users within SentryFile.

Users can have a variety of permissions to access various parts of the Managements area. The permissions include Global Options, Add Cabinets, Manage Groups, Manage Users, Manage Rights, Manage System Messages, View Server Info. "+" icons are used to add users, while red "X" icons are used to remove a user. Blue arrow icons are used to modify the permissions of the user.

### 😴 Rights

Rights allows you to manage who can access what documents within the system and what operations they can perform with those documents.

![](_page_44_Picture_3.jpeg)

Users and groups can be assigned the rights to do specific operations on specific Cabinets. The rights are Search/View Documents, Upload Documents, Add/View Annotations, Email Documents, Modify Index Data Values, Delete Documents, Append Pages to PDF Documents, Manage documents in the Recycle Bin, and Manage the Index Fields for a Cabinet.

"+" icons are used to give rights to users/groups for a cabinet, while red "X" icons are used to remove a user/group's rights to a cabinet. Blue arrow icons are used to modify the rights of the user/group within the Cabinet.

### <sup>J</sup> Messages

Messages allows you to communicate information to other users of the SentryFile system. To add a message simply click the white "+" icon and enter your message. To delete a message click the red "X" icon.

![](_page_45_Picture_3.jpeg)

### Recycle Bin

The Recycle Bin shows which documents have be deleted by users. Users with access to the Recycle Bin have the ability to permanently delete documents or restore documents.

![](_page_46_Figure_3.jpeg)

The user will only be able to view documents within the recycle bin which he has recycle bin rights for.

### 🗐 Server

The Server area gives information about the SentryFile server. This information includes the server address, application path, free hard drive space, the number of users within the system, and the number of cabinets within the system.

![](_page_47_Picture_3.jpeg)

## 🖏 Sign Out

To sign out of SentryFile click the "Sign Out" icon in the top right corner of the screen. You will be asked to confirm whether you want to sign out, if you choose "OK" then you will be returned to the Sign In screen.

🖉 SentryFile - Microsoft Internet Explorer
File Edit View Favorites Tools Help
😓 Back 🔹 🤿 🖉 🚰 🔚 🔚 Personal Bar 🔇 Search 📾 Favorites 🍏 🛃 🖕 🎒 🐨 🗉 🍪 🖏
Address 🙋 http://localhost/sfe5/default.asp?signoff=yes 🔽 🔗 Go
Registered to: ABC Corporation
Sign In Username: Password: Sign In SentryFile is Copyright © 2002 Upper Canada Office Systems All Rights Reserved. Use of this software is governed by the terms of the <u>license agreement</u> .

Because web browsers cache the pages you have visited you should close your browser to flush the history. Otherwise a malicious user could use the "Back" button to view data that you viewed during your session. A malicious user would not be able to access any new content, when you sign out your security credentials are removed. This means the malicious user might be able to view data from your history, but he will not be able to make new requests.