DocView User Manual

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Appendix A: List of Shortcuts

Installation and Activation

Install DocView

This section explains the basic steps for installing DocView.

Hardware Requirements

- OS Required: Windows NT
- Memory: 128 MB RAM minimum
- Hard Disk Capacity: 10 GB minimum

Installation Steps

To install DocView application on your machine follow the steps mentioned below: -

1. Insert the installation CD ROM in the diskette
2. Double click on the setup.exe
   Installation program starts
3. Follow the on-screen instruction to complete the installation

Activate DocView

Activation (Auto)

When application launches it will check for the activation file.

CLIENT

> *PRODUCT NOT ACTIVATED*
> - Display a message to the user
> - Display the activation form (This form will contain the required information to be filled by the user). The Serial Key is compulsory
> - Connect to the **Activation Server**
>
>   *CONNECTED*
>   ? Send the request for activation

SERVER

- Validate the request
- Check for the Serial Key

  VALIDATION SUCCESS
  ? Generate UNLOCK file
  ? Send the UNLOCK file as response to user

  VALIDATION FAIL
  ? Send False response

CLIENT

- Decrypt the UNLOCK file
- Display ACTIVATION COMPLETE message

Activation (Manual)

This is a case when the user is not having a facility for internet connection from the machine where DocView is installed. The user can either email to the Administrator or make a call using telephone for activation. The administrator registers the call and sends the activation files via email.

CLIENT

· Register the information with the administrator

ADMINISTRATOR

· Note the details of the CLIENT

· Enter the CLIENT information and **serial key** in the server database

· Generate the activation file

· Mail the file to the CLIENT

CLIENT

· Receive the file

· Start activation program using DocView application

· Specify the activation file location

· Application activates the product

Overview

DXDocView is a desktop based cost effective document storage and retrieval solution.

DXDocView addresses your requirements to search/retrieve simple indexed documents. You can scan documents or import external scans into the system and index them.

DocView allows you to index documents using upto 15 user specific index fields. Indexing facilitates easy document retrieval at a later stage. You can create new index or modify existing one as and when required.

DocView enables you to categorize documents to be indexed. These categories are available in a predefined list that can be customized.

Additional features like print, e-mail, compile documents, recent documents list, favorites list, reading list etc., are also incorporated in DocView making it an ideal application of its own kind.
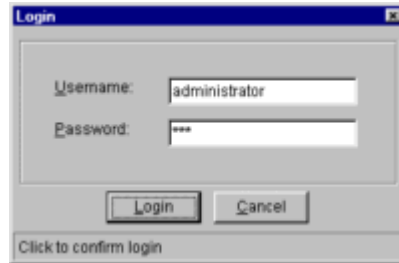
Basic navigation, view and zoom features of DocView make online viewing of documents an easy and exciting experience.

Starting DocView

DocView can be started like any other application. After you have started your workstation, you can click 'DocView' option in Programs menu to launch the application.

Login

The first thing you will see on starting the application.

Fig 1.0 Login Dialogue Box

User Name   Type your system User Name here

Password   Type your password here. You will not be able to see the characters you enter as you type them, so someone else cannot find out your password. As the system keeps close track of all the actions of every user, it is important for you to keep it a secret.

Login   Clicking this will send your User Name and Password to the central server for license and user validity checks.

Cancel   Clicking this will cause the Login Screen to disappear and will stop the login process. The application will stop completely. To start again you will have to click on the desktop icon.

You must login with a valid Username and Password and click "OK". Once your Username and Password have been validated by the system, you will see the DocView interface.

Working with Documents

Import Document

DocView allows you to import scanned documents into the DocView system.

To import a document click 'Import Document' icon on the toolbar or select 'Import' option from the 'File' menu. Doing this opens the 'Import Document' dialog box.

On the 'Import Document' dialog box double-click on the 'Import Document' icon. You will see the 'Import Document' interface.

'Import Document' interface allows you to import documents in any of the available categories.

While importing the documents you have to enter the Index data for the documents that is stored in the search database and is required for searching and retrieving the documents later.
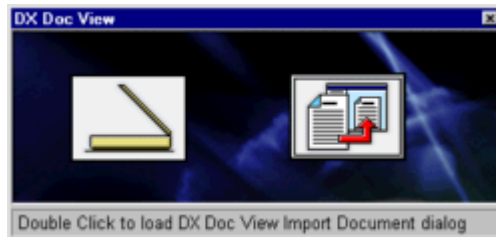
Fig 4.0 Import Document dialog box

Scan   Selecting this will open the DocView Scan dialog

Import   Selecting this will open the Import Document interface

Note:

Make sure you have configured the import location before importing the files. *(To see how to configure the import location refer section 9.1 System Configuration)*

Import Document Screen

The 'Import Document' screen is divided into two windows i.e. Left and Right window.

Left window of the Import Document screen has commands that allow you to browse and load the documents on the interface, select category and enter Index data. It also displays the list of loaded documents.

Right window of the Import Document screen displays the selected document and Import toolbar that allow you to navigate through the documents, Zoom In/Out and Import the selected documents.
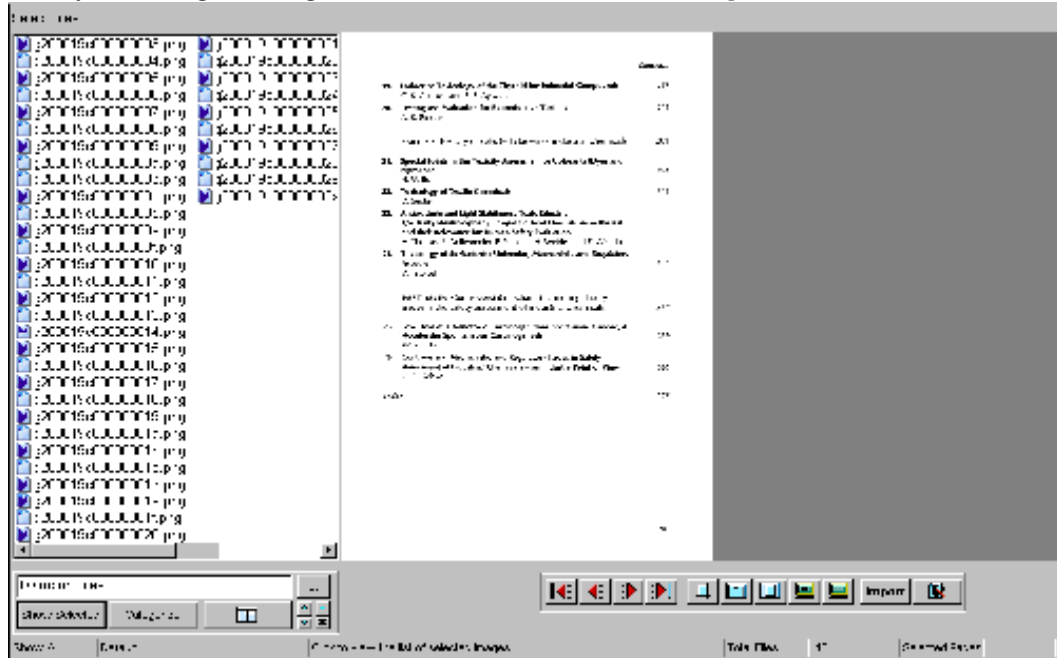

Fig 6.0 Import Document Screen

Left Window Commands

Browse	Clicking this will display the Browse for Folder dialog box
Show All/Selected	Clicking this will show all files available in the list. This is a toggle and clicking again on the same button will display the files that are currently selected
Categorize	Clicking this will open the Select Category dialog box. Here you can choose the required category
Index	Clicking this will display the Index Fields. Here you can enter the Index data for the documents to be imported

Import Options Toolbar buttons

|	
First Page	Clicking this will take you to the first page
Previous Page	Clicking this will take you to the previous page
Next Page	Clicking this will take you to the next page
Last Page	Clicking this will take you to the last page
Fit to Page	Clicking this allows you to view the entire page on the interface
Fit to Width	Clicking this will reduce the page size so that you don't have to scroll horizontally view entire text line
Zoom In	Clicking this will allow you to view the document in enlarged size
Zoom Out	Clicking this will allow you to view the document in reduced size
Import	Clicking this will Import the selected document
Close Import Window	Clicking this will close the Import document screen

Scan Document

DocView has an integrated scanning module that enables documents scanning. Later you can Import the scanned document using the import option (Refer to 'Import' section for details) of DocView.

DocView supports TWAIN image acquisition standard, allowing you to add and use a wide variety of scanner models.

To scan a document click the 'Scan Document' icon on the toolbar or select 'Scan' option from the 'File' menu. The 'DocView Scan Interface' appears on the screen as a new window.

'DocView Scan Interface' allows you to select source and the required output file format.
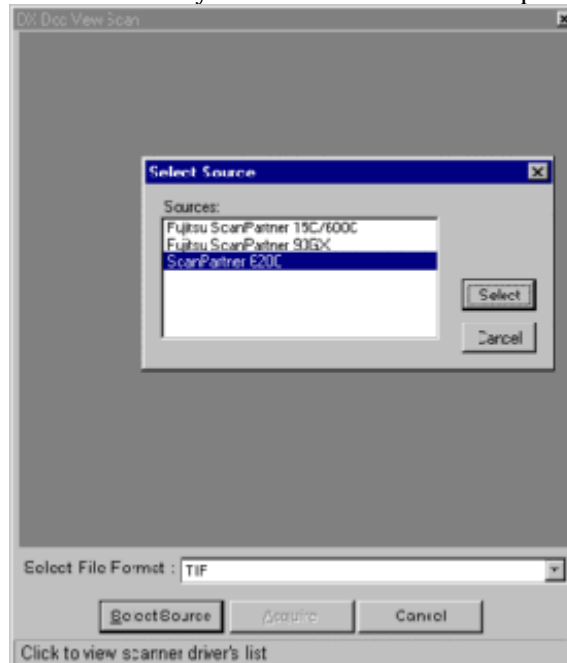
Fig 3.0 DocView Scan Dialog Box

Select File Format	It is a drop down list of different image file formats from which you can choose the required format for the output scans
Select Source	Allows you to select the source scan drivers. Clicking this will display the available source scan drivers for you to select the required one.
Acquire	Clicking this will send a scan start signal to the TWAIN interface driver
Cancel	Clicking this will cause the DocView Scan interface to disappear. To start scanning again you will have to click the Scan Document icon on the toolbar.

Note:

Make sure you have configured the scan location before scanning the documents. *(To see how to configure the scan location refer section 9.1 System Configuration)*
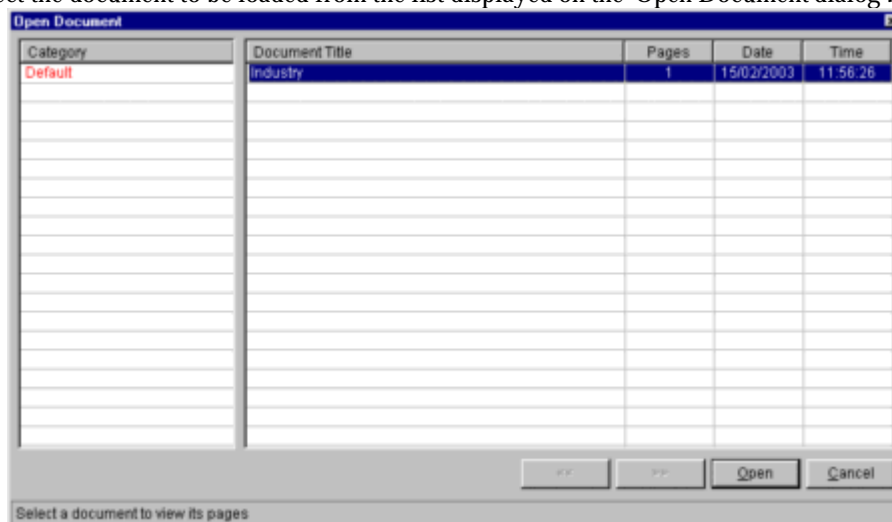
Open Document

You can open any of the documents stored in the system for viewing on the application interface.

To open a document click the 'Open Document' icon on the toolbar or select 'Open' option from the 'File' menu. On doing this you will see the 'Open Document' dialog box.

The Open Document dialog box displays the list of available categories in the left pane.

On selecting the required category, document titles of all the documents pertaining to that category is displayed in the right pane of the interface along with the total number of pages, date and time. **A maximum of 20 documents can be displayed in a view**.

You can select the document to be loaded from the list displayed on the 'Open Document'dialog box.

Fig 2.0 Open Document Dialog box

>>	Clicking this will display next 20 document titles, if the list has more than 20 entries
<<	Clicking this will display previous 20 document titles, if the list has more than 20 entries
Open	Clicking this opens the document selected from the list of documents displayed in the right pane of the 'Open Document' dialog box
Cancel	Clicking this will close the 'Open Document' dialog box

Export Document

You can export the open document to any other storage location.

To export a document click the 'Export Document' icon on the toolbar or select 'Export' option from the 'File' menu. On doing this you will see the 'Export Document' dialog box.

'Export Document' dialog box allows you to specify the Export Location where you want to transfer the exported pages. It also allows you to choose the page range for the document pages to be exported.
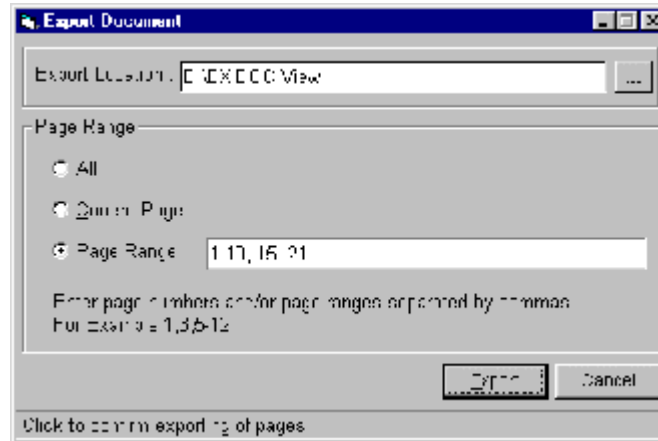
Fig 3.0 Export Document dialog box

Export Location	Allows you to browse and select the required export location.
Page Range options: -	
All	Exports all the pages of the document
Current	Exports the page currently displayed on the interface
Page Range	Exports the range of pages specified by you
Export	Clicking this will export the selected pages of the document as per the Page Range options set by you
Cancel	Clicking this will close the Export Document dialog box

Note: You can specify page numbers and/or page ranges separated by commas. For example 1-5, 10, 14-20.

View Document/Page properties

You can view the document and page properties of the document or page you are viewing.

To see the document/page properties select 'Properties' option from 'File' menu and then choose 'Document/Page ' as required. This will display the 'Document/Page Properties' dialog box.
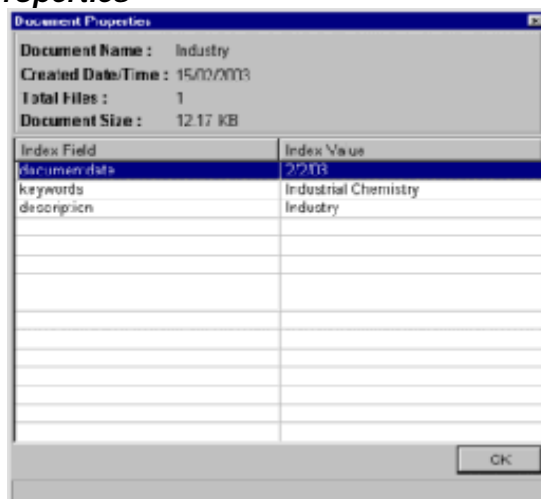
Document Properties

Fig 4.0 Document Properties dialog box

Document Name	Displays name of the document
Created Date/Time	Displays Date and Time of creation
Total Files	Displays total number of files in the document
Document Size	Displays total size of the document
Index Field	Displays list of the Index Fields
Index Values	Displays values of the Index Fields
OK	Clicking this will close the Document Properties dialog box

Page Properties
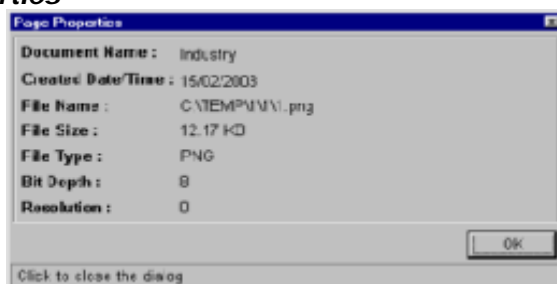
Fig 5.0 Page Properties dialog box

Document Name	Displays name of the document to which the page belongs
Created Date/Time	Displays Date and Time of creation
Filename	Displays the filename
File Size	Displays filesize
File Type	Displays the filetype
Bit Depth	Displays the value of Bit Depth
Resolution	Displays value of the resolution
OK	Clicking this will close the Page properties dialog box

Email

DocView allows you to Email scanned documents to your desired destination as an attachment.

To Email a document click 'Email' document icon on the toolbar or select 'Email' option from 'File' menu. On doing this you will see the 'Email' document dialog box.

The Email document dialog box allows you to specify recipients email id, write the message and select the page range.

You can send email to multiple recipients at one go, by specifying their Email Id's separated by semi colon.
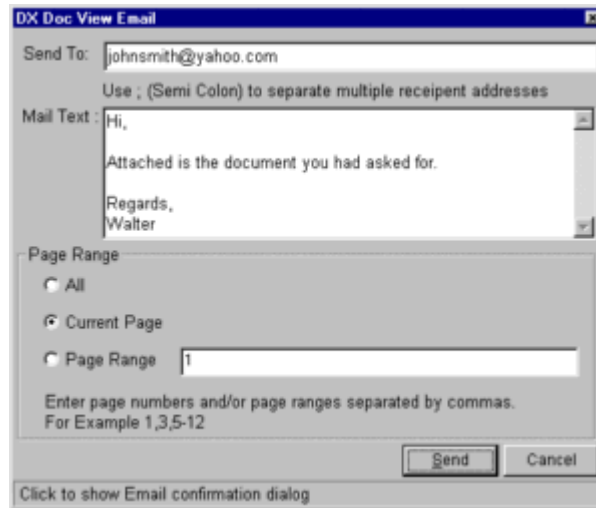
Fig 6.0 DocView Email Dialog Box

Send To	Type the recipient's Email Id here
Mail Text	Type your message here (optional)
Page Range options: -	
All	Emails all the pages of the document
Current	Emails the page currently displayed on the interface
Page Range	Emails the range of pages specified by you
Send	Clicking this will email the selected pages of the document as per the Page Range options set by you
Cancel	Clicking this will close the DocView Email Document dialog box

Print Document

You can open and print any of the documents in the DocView system.

To print a document click the 'Print Document' icon on the toolbar or select 'Print' option from the 'File' menu. On doing this you will see the 'Print Document' dialog box.

'Print Document' dialog box allows you to select any of the printer. You can specify the Print Range of pages to be printed.
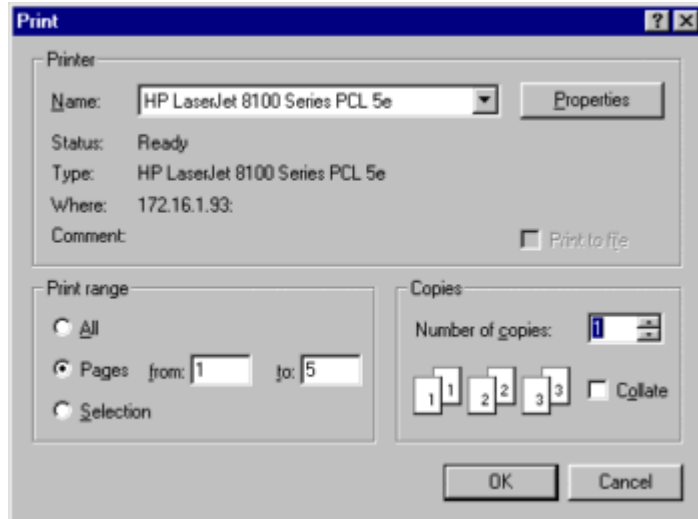
Fig 3.0 Export Document dialog box

Printer options

Printer	Allows you to select any of the available printer
Print Range options: -	
All	Prints all the pages of the document
Pages	Prints the range of pages specified by you
OK	Clicking this will print the pages as per the page range options set by you
Cancel	Clicking this will close the Print dialog box

Lists

Favorites List

Add To Favorite

DocView allows you to add your favorite pages from different documents to the favorites list , so that it is easy to open them in the future .

To add a page to the favorites list, go to the page you want to add and click 'Add To Favourites' icon on the toolbar or select 'Add To Favourites' option from 'File' menu.

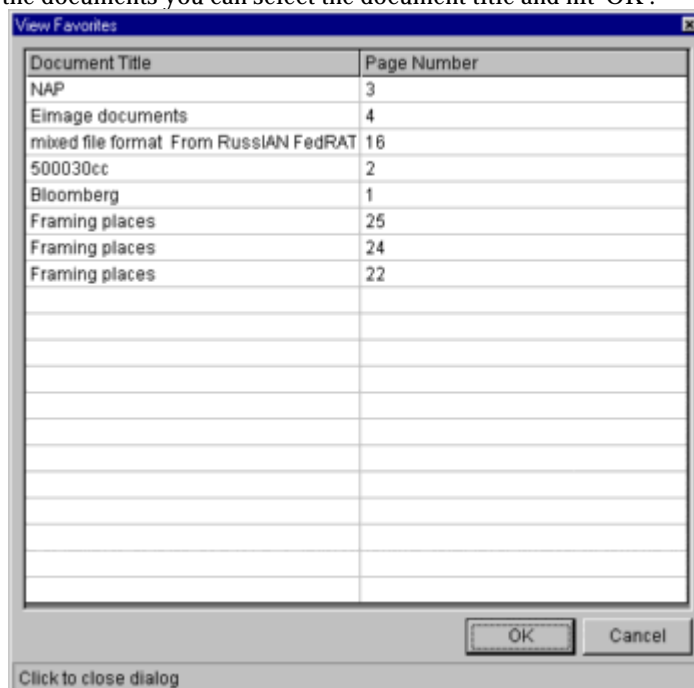Doing this will add the page to the favorites list.

View Favorites List

You can view the favorites list at any time while you are working on DocView.

To view the favorites list, click 'View Favorites' icon on the toolbar or select 'View Favorites' option from 'View' menu. Doing this will display the 'View Favorites' dialog box.

The 'View Favorites' dialog box lists the document titles and the page numbers of the pages that are added to the Favorites list.

To open the documents you can select the document title and hit 'OK'.

Document Title	Page Number
NAP	3
Eimage documents	4
mixed file format From RussIAN FedRAT	16
500030cc	2
Bloomberg	1
Framing places	25
Framing places	24
Framing places	22

Fig 6.0 View Favorites dialog box

OK Clicking this opens the document selected in the list

Cancel Clicking this closes the View Favorites dialog box

Note and Tips:

Selecting the Document Title on the 'View Favorites' dialog box opens the document with first page as the default opening page.

Selecting the Page Number on the 'View Favorites' dialog box opens the document with the selected page as the default opening page.

If the page you are adding is already present in the Favorites List, the application will display message 'This document page already exists in favorite list'

Reading List

Add Document to the Reading List

DocView allows you to add documents of your preference to the reading list.

To add a document to the reading list, open the document you want to add and click 'Add to Reading List' icon on the toolbar or select 'Add Document to Reading List' option from 'File' menu.

Doing this will add the document to the Reading list.

View Reading List

You can view the documents in the Reading List any time when you have DocView open.

To view the Reading List, click 'View Reading List' icon on the toolbar or select 'View Reading List' option from 'View' menu. Doing this will display the 'View Reading List' dialog box.

The 'View Reading List' dialog box lists the document titles of the documents added to the Reading list. The date and time when the documents were added to the list is also displayed.

To open the documents you can select the document title and hit 'OK'.

Fig 7.0 View Reading List dialog box

OK	Clicking this opens the document selected in the list
Cancel	Clicking this closes the View Reading List dialog box

Search Documents

DocView gives you customized search options which searches the search terms entered by you for selected category, index fields depending on the search criteria (AND/OR/PHRASE).

DocView allows you to search within a selected category or across all defined categories.

To start search click 'Search' icon on the toolbar or select 'Search' option on the menu bar. Doing this will display the search documents interface.

The Select Categories window of the search documents interface displays all the defined categories. You can select the required category and view its Index Fields that are displayed in the Select Index Fields window.

Fig 12 Search Documents Interface

Select Index Fields	Index Fields of the category you have selected is displayed here
Select Category	List of all the defined categories is displayed here
Search Terms	Enter the terms you want to search here
Search Criteria	It is a drop down menu that allows you to select the search criteria. Search criteria available are PHRASE, AND, OR
Search Results	It is a drop down menu that allows you to select the number of results to be displayed on the screen at a time
From/To Date	Allows you to select the date from/to for searching documents created in a particular time frame
Go	Clicking this sends a command to the search engine to start search
Clear	Clicking this clears the details of the previous search
Previous	Clicking this will display previous 20 search results, if the list has more than 20 entries.
Next	Clicking this will display next 20 search results, if the list has more than 20 entries.

Note: Double click on the search results to open the document on DocView interface.

Research

Compile

DocView allows you to create your own compiled documents.

You can add page(s) from different documents to the compiled documents. Compiled documents help you to gather pages of importance and store them into single document for future reference.

You can delete page(s) from the compiled documents or delete existing compiled documents at any point of time.

You can also Print and Email compiled documents.

Add Page

To add page to compiled documents select Research menu, point to compile and click 'Add Page option'. Doing this will display the Add Page to Compiled Document dialog box.

Add Page to Compiled Document dialog box allows you to create compiled document, or add page(s) to existing compiled document that are listed in the dialog box.
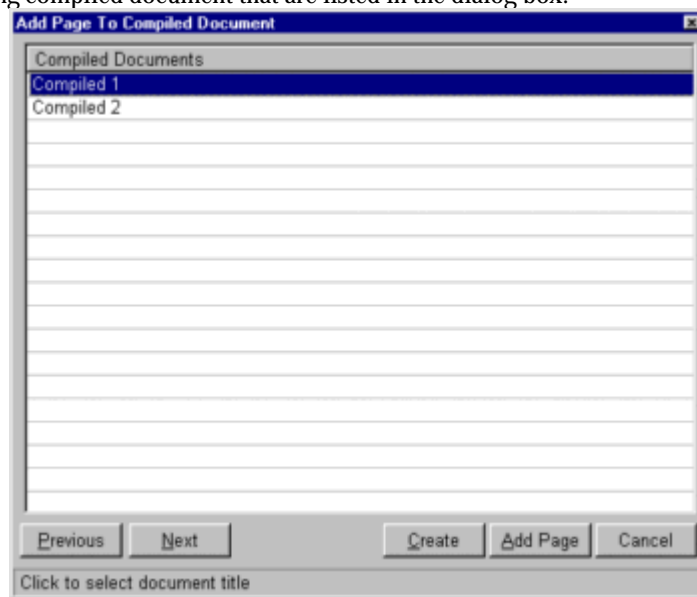

Fig 13 Add Page To Compiled Document dialog box

Create	Clicking this displays the Add Page To Compiled Document dialog box. Here you can define the name for the new compiled document you are creating.
Add Page	Clicking this adds the page currently displayed on the interface to the compiled document selected by you.
Cancel	Clicking this will close the Add Page To Compiled Document dialog box
Previous	Clicking this will display previous 20 compiled documents, if the list has more than 20 items.
Previous	Clicking this will display next 20 compiled documents, if the list has more than 20 items.

View Compiled Documents

To view the compiled documents select Research menu, point to compile and click 'View Compiled Documents' option. Doing this will display the Compiled Document dialog box.

The 'View Compiled Documents' dialog box allows you to open or delete any of the compiled documents listed on the dialog box.
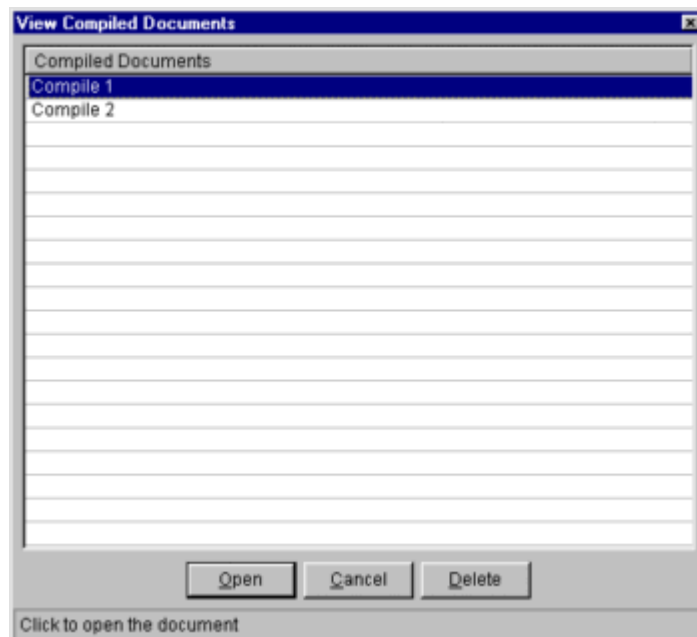
Fig 14 View Compiled Documents Dialog Box

Open	Clicking this opens the selected compiled document on the DocView interface
Cancel	Clicking this will close the View Compiled Documents dialog box
Delete	Clicking this will delete the selected compiled document. Before deleting the document, message for confirming deletion is displayed

Note: Make sure you close the documents you are deleting before hitting the delete option.

Threads

DocView enables you to link related pages using threads (smart links).

At times accessing a particular document is not enough. Accessing related documents may be required as well.

DocView allows creation of thread which is a combination of related pages links for quick reference.

While accessing a document you can easily access the related pages using threads.

You can add any number of threads to a document. Unwanted page(s) or threads can be deleted at any point of time.

Add Page

To add page to a thread select Research menu, point to threads and click 'Add Page' option. Doing this will display the 'Add Thread Details' dialog box.

'Add Thread Details' dialog box allows you to add new thread and add currently displayed page to any of the existing threads.
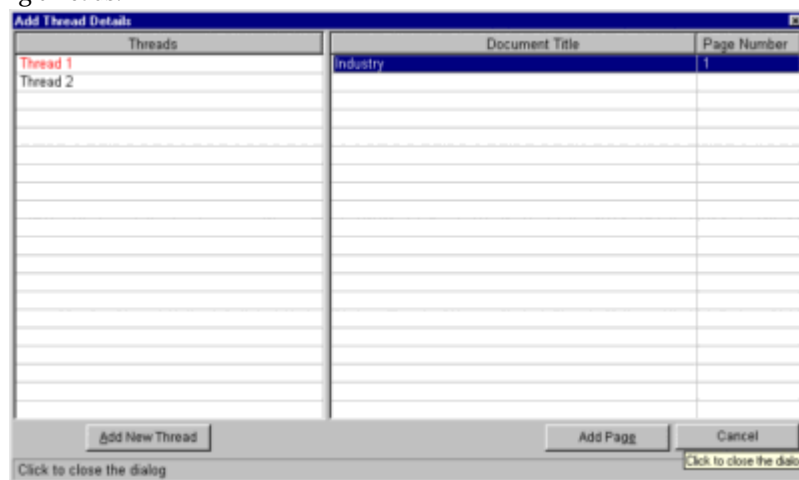
Fig 15 Add Thread Details dialog box

|	
Add New Thread	Clicking this allows you to create new threads. Dialog box for Thread Title will be displayed where you can specify the name for the new thread.
Add Page	Clicking this adds the page currently displayed on the interface to the thread selected by you.
Cancel	Clicking this closes the Add Thread Details dialog box.

Manage Threads

DocView allows you to manage threads as per your requirement.

You can delete unwanted thread(s) or delete page(s) from the existing threads.

To add page to a thread select Research menu, point to threads and click 'Manage Thread' option. Doing this will display the 'Delete Thread' dialog box.

'Delete Thread' dialog box allows you to delete unwanted thread(s) or page(s) from threads.
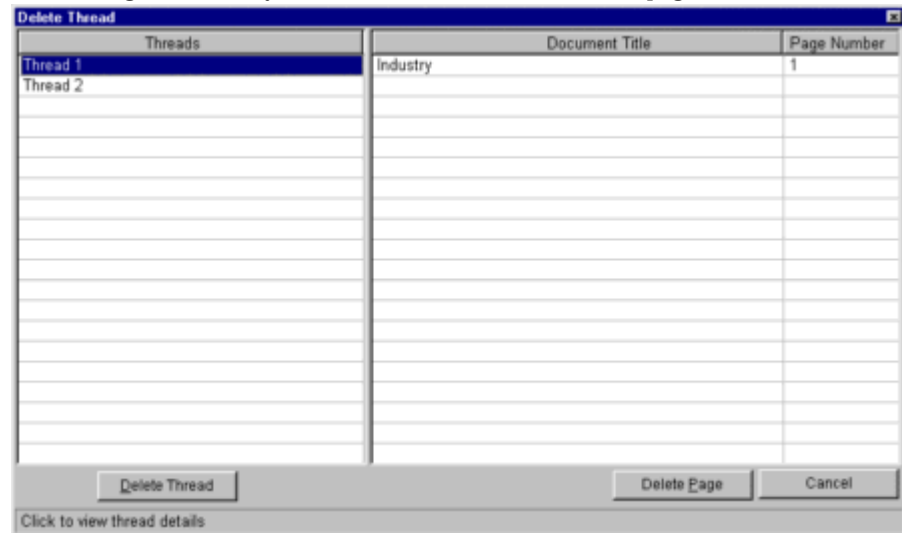
Fig 16 Delete Thread dialog box

Delete Thread   Clicking this deletes unwanted thread you have selected

**Delete Page**   Clicking this deletes unwanted Page you have selected

Cancel   Clicking this closes the Delete Thread dialog box.

View Threads

While viewing a document you can view a list of threads attached to it.

To view threads attached to a document, select 'View Related Document' option under 'Lists' menu. Doing this will display 'View Related List' dialog box.

'View Related List' dialog box displays the list of all the threads attached to the document you are viewing. You can even open any of the page listed on the dialog box.
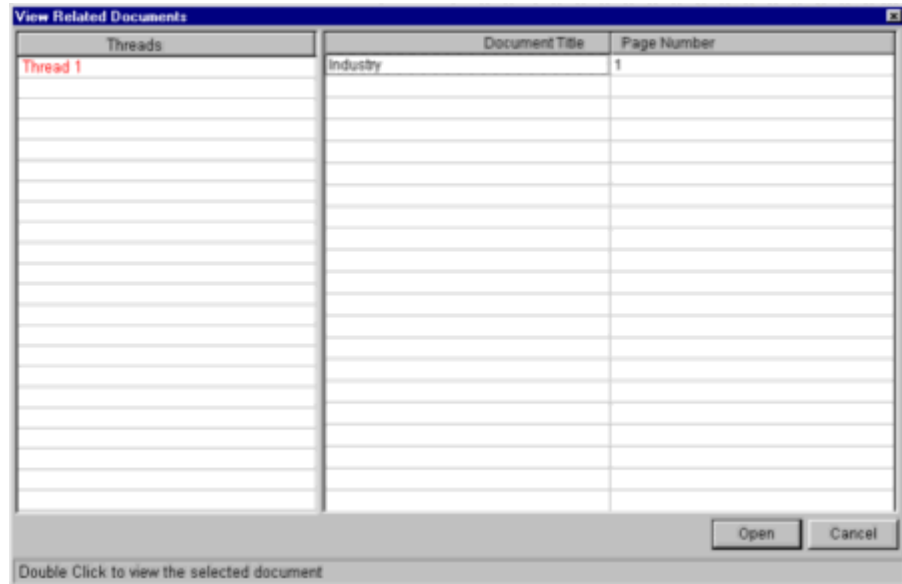
Fig 17 View Related Documents Dialog Box

Open   Clicking this opens selected by you on the DocView interface

Cancel   Clicking this closes the 'View Related Documents' dialog box
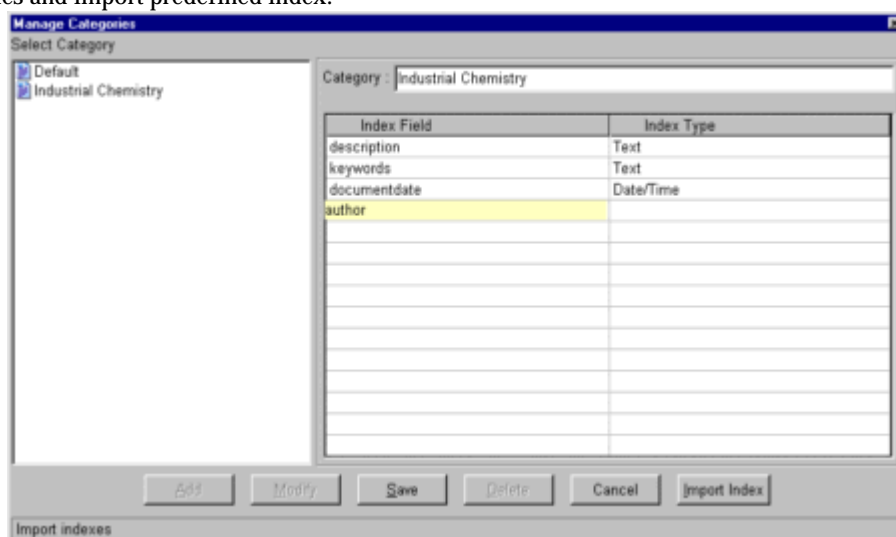
Manage

Categories

DocView allows you to manage categories. You can add, delete or modify categories as per your requirement.

DocView has an option to import predefined index while adding new categories.

To manage categories click the 'Manage' icon on the toolbar and choose 'Categories' option from the drop down list or select 'Categories' option from 'Manage' menu. Doing this will display the 'Manage Categories' dialog box.

Manage Categories dialog box allows you to add new category, modify existing categories, delete categories and import predefined index.

Fig 8.0 Manage Categories dialog box

Add	Clicking this will add a new category
Modify	Clicking this allows you to modify an existing category
Save	Clicking this will save new categories or modifications made to the existing categories
Delete	Clicking this will delete the category selected
Close	Clicking this closes the manage categories dialog box
Import Index	Clicking this allows you to import predefined Index

Note: You cannot delete or modify the default category.

Index

DocView allows you to manage Index as per your requirements.

You can view and modify index of the documents as and when required.

To view and modify index click the 'Manage' icon on the toolbar and choose 'Index' option from the drop down list or select 'Index' option from the 'Manage' menu. Doing this will display 'View/Modify Index' dialog box.

The 'View/Modify Index' dialog box displays all Index Fields and their values.

'View/Modify Index' dialog box allows you to modify the index values. You can click on the index values and make the required changes.

To save the changes use the save button on the dialog box.
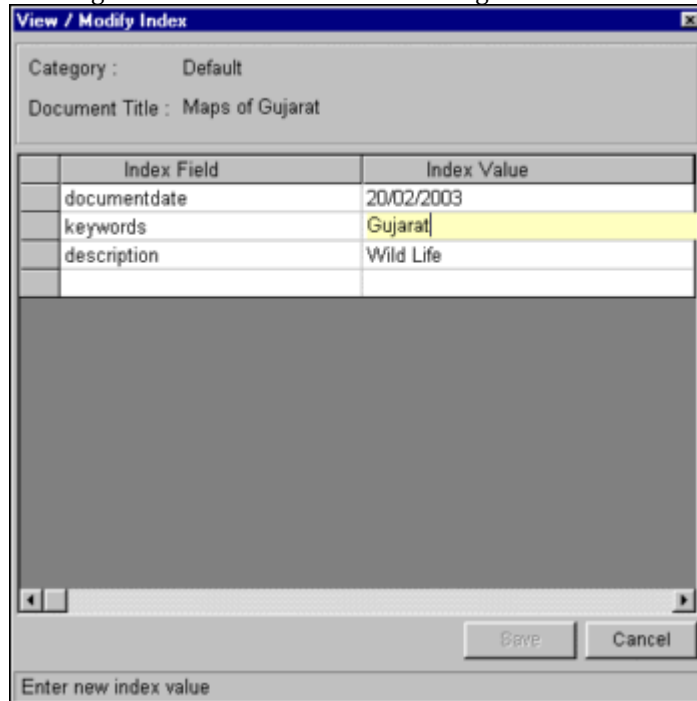

Fig 17 View / Modify Index dialog box

Save   Clicking this will save the modifications you have made to the Index Values

Cancel   Clicking this will close the View/Modify Index dialog box

Documents

DocView allows you to delete documents from any of the categories.

To delete a document click 'Delete Documents' icon on the toolbar or select 'Delete Documents' option from the 'Manage' menu. Doing this will display the 'Delete Document' dialog box.

'Delete Document' dialog box displays all the categories and their documents they contain. 'Delete Document' dialog box allows you to delete unwanted documents from the system.
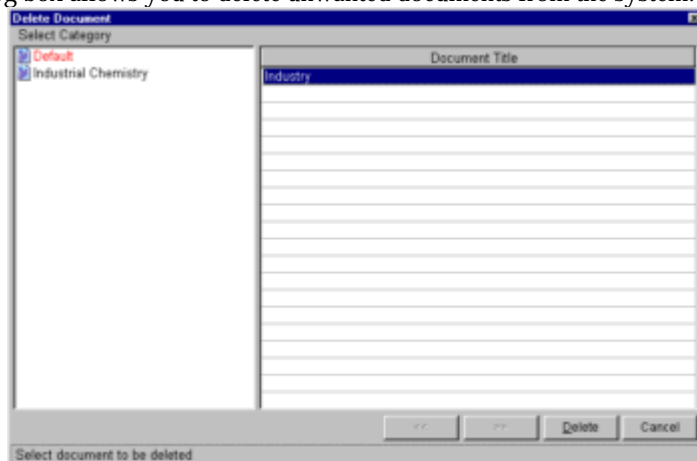
Fig 9.0 Delete Documents dialog box

|	
>>	Clicking this will display next 20 document titles, if the list has more than 20 entries
<<	Clicking this will display 20 document titles, if the list has more than 20 entries
Delete	Clicking this deleted the document selected from the list of documents displayed in the right pane of the 'Delete Document' dialog box
Cancel	Clicking this will close the 'Delete Document' dialog box

System

Configuration

DocView allows you to define the scan /import destination location and document format using the 'Configuration' option.

To change the configuration of the application click the 'Configuration' icon on the toolbar or select 'Configuration' option under 'System' menu. Doing this will display the 'Configuration' dialog box.

'Configuration' dialog box allows you to browse and select the scan and import location as per your preference. It also allows you to specify the document format required for the output scan files.
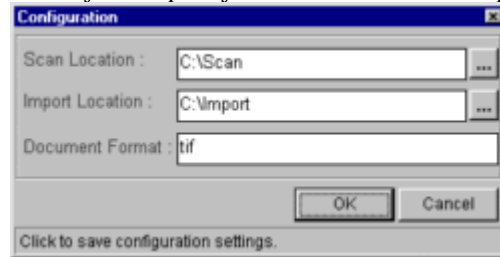

Fig 10 Configuration dialog box

Scan Location	Type the scan location here or click the browse button to select the scan location
Import Location	Type the import location here or click the browse button to select the import location
OK	Clicking this will save the configuration settings and close the dialog box
Cancel	Clicking this will close configuration dialog box without saving the settings

Note: Please create the Scan and Import directories before you configure the Scan and Import Location.

Change Password

DocView has an option to change the system password in case required for security purpose.

To change the password click 'Change Password' icon on the toolbar or select 'Change Password' option from 'System' menu. Doing this will display 'Change Password' dialog box.
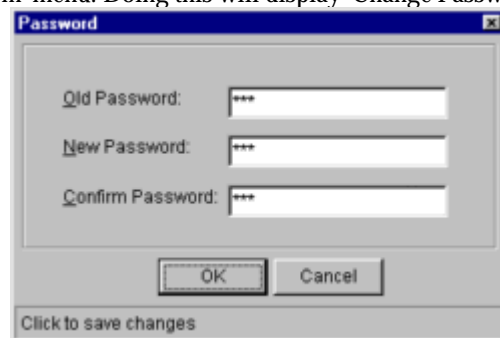
Fig 11 Password dialog box

Old Password	Type the current password here
New Password	Type the new password here
Confirm Password	Re-type the new password here for confirmation
OK	Clicking this will save the changes you have made
Cancel	Clicking this will close the 'Password' dialog box

Backup

DocView allows you to take backup of the system data.

DocView provides you with two backup options that are Copy and Move.

Any of the two options allow you to select documents and specify the destination location for the same.

Copy

Copy option allows you to take the backup and stores the source data.

To backup data using copy option select 'Copy' from 'File' menu. Doing this displays the 'Copy Documents' dialog box.
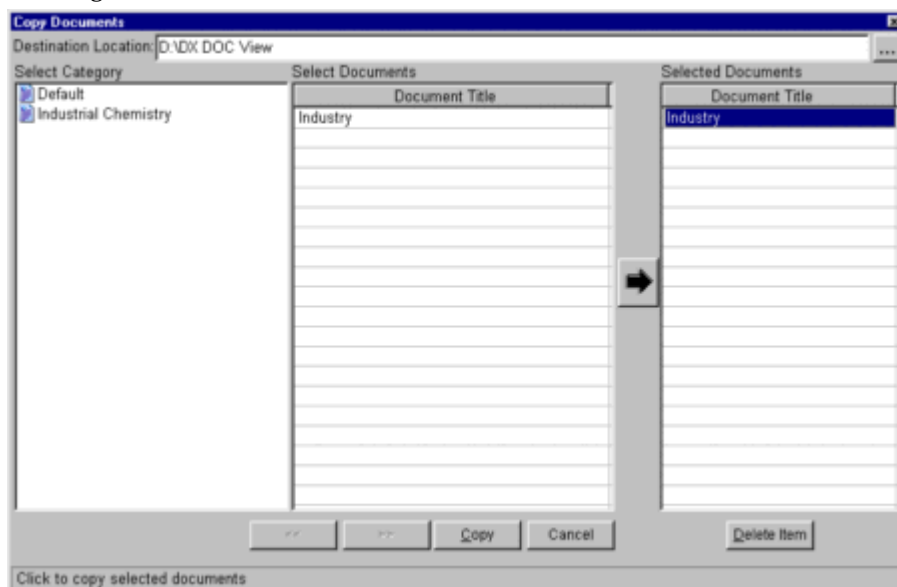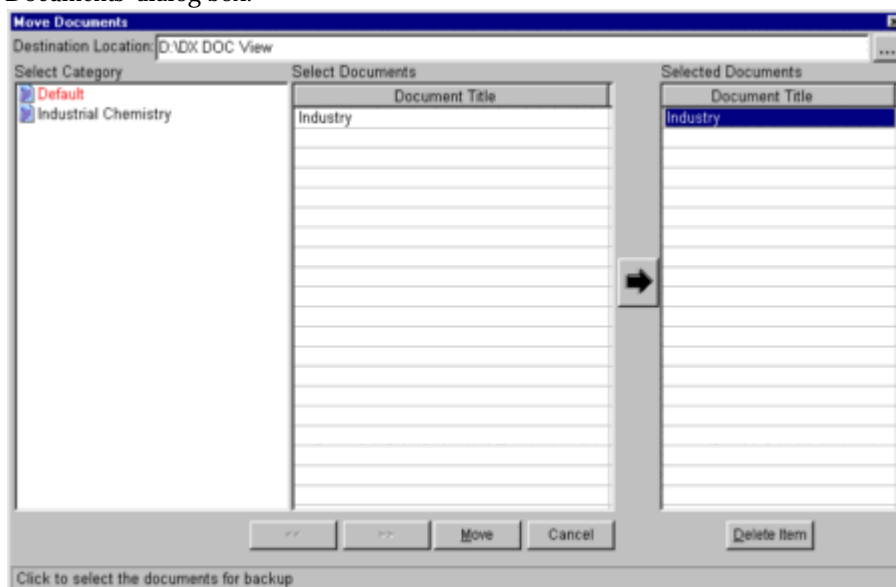

Fig 18 Copy Documents dialog box.

Copy	Clicking this will execute the copy operation. Source data will be stored in the same location
Cancel	Clicking this will close the 'Copy Documents' dialog box
Delete Item	Clicking this delete the selected documented. You can use this option if you have selected wrong document
<<	Clicking this will display previous 20 document titles, if the list has more than 20 entries
>>	Clicking this will display next 20 document titles, if the list has more than 20 entries

Move

Move option allows you to take the backup and deletes the source data.

To backup data using move option select 'Move' option from 'File' menu. Doing this displays the 'Move Documents' dialog box.

Fig 18 Move Documents dialog box.

Move	Clicking this will execute the move operation. Source data will be deleted
Cancel	Clicking this will close the 'Move Documents' dialog box
Delete Item	Clicking this delete the selected documented. You can use this option if you have selected wrong document
<<	Clicking this will display previous 20 document titles, if the list has more than 20 entries.
>>	Clicking this will display next 20 document titles, if the list has more than 20 entries.

User Features

Navigation

You can navigate page-by-page or to any page of the document using the navigation buttons on the DocView toolbar.

Left pane of the DocView interface displays list of filenames present in the document.. You can click on any filename in the list you wish to view.

Navigation buttons on the DocView toolbar

	Clicking this will display the first page of the document
	Clicking this will display the previous page
	Clicking this will display will display the next page
	Clicking this will display the last page of the document
	Clicking this will displays the Go-To-Page dialog box. Enter the page you wish to view and hit enter

Customized View

DocView gives customized view options like Single, Double and Full Screen.

Clicking on the appropriate view buttons on the DocView toolbar allows you to select the required view options.

	Clicking this will display one page on the interface at a time
	Clicking this will display two pages on the interface at a time
	Clicking this will display the document in Full screen mode

Zoom

DocView allows you to zoom in to the picture to pixel resolution.

You can select the zoom options by clicking on the zoom buttons available on the DocView toolbar.

	Clicking this will display the page in enlarged size
	Clicking this will display the page in reduced size
	Clicking this will display zoom percentage drop down menu. Select the required zoom settings
	Clicking this will reduce the display so that the entire page fits in the document window

Rotate

DocView allows you to rotate page by an angle of 90, 180 and 270 degrees as selected.

To rotate a page click on the rotate button on the DocView toolbar.

	Clicking this will display the rotate drop down menu. Select the required angle to set rotation.

Appendix A: List of keyboard shortcuts

Shortcut Key	Description
View Options	
Ctrl + S	Single Page View
Ctrl + D	Double Page View
Ctrl + L	Full Screen Mode
Esc	Quit Full Screen Mode
Navigation Options	
Home	Move to First Page
End	Move to Last Page
Page Down	Move to Next Page
Page Up	Move to Previous Page
Ctrl + N	Go To Page
Up Arrow	Vertical scroll upwards (Small Change)
Down Arrow	Vertical scroll downwards (Small Change)
Left Arrow	Horizontal scroll towards left (Small Change)
Right Arrow	Horizontal scroll towards right (Small Change)
Ctrl + Shift + Up arrow	Vertical scroll upwards (Large Change)
Ctrl + Shift + Down arrow	Vertical scroll downwards (Large Change)
Ctrl + Shift + Left arrow	Horizontal scroll towards left (Large Change)
Ctrl + Shift + Right arrow	Horizontal scroll towards right (Large Change)
Zoom Options	
Ctrl + +	Zoom In
Ctrl + -	Zoom Out
Ctrl + 0	Fit to Page
Ctrl + 1	Fit to Width
Ctrl + 2	Fit to Height
Ctrl+Shift+L	Lock Zoom Settings
Rotate Options	
Ctrl + up arrow	Rotate Page by 0°
Ctrl + right arrow	Rotate Page by 90°
Ctrl + down arrow	Rotate Page by 180°
Ctrl + left arrow	Rotate Page by 270°
General Options	
F1	Doc View Help
Alt + V + W	Show/Hide Pane
Alt + V + T	Show/Hide Toolbar
Ctrl + Shift + V	Lock Scroll Position
Alt + F4	Quit Application

Table 1.0 List of DocView shortcut keys