DocView Help File Contents

Introduction to DocView

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

DocView addresses the following requirements:

- o Scan Documents
- o Index Documents
- o Import Documents
- o Search Documents
- o Retrieve Documents

You can categoriz e documents making it easy to search and retrieve documents in future.

Additional features like print, e-mail, compile documents, recent documents list, favourites 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 add on to make online viewing of documents an easy and exciting experience.

Features of DocView

Scanning:

DocView has an integrated scanning module that allows documents to be scanned right into its database. DocView allows single as well as multiple page scanning. DocView supports TWAIN, allowing you to use a wide variety of scanner models.

Indexing: DocView allows you to index on title, date and file format, which is mandatory. You can index documents upto 15 fields. It also allows you to create and modify index, set index templates, and record index date and time. Indexing forms the most critical part of document capture in DocView.

Powerful yet Simple Search Engine: DocView allows you to search on title, date and file format. You can search across categories by keyword(s) and/or Boolean search.

Customized View: DocView gives you options single and double page view. You can also zoom in to the picture to pixel resolution. It also supports rotating, inverting, and de-skewing the images.

Print Facility: DocView allows you to print by current page, entire document, or print by page range. It also allows you to view print details.

Email Facility: DocView has provision that facilitates e-mail of scanned documents to your desired destination. It also allows you to see the attachment details.

Favorite List: DocView has this unique feature where you can add documents to your favorite list. Others options like 'View Favorites', 'Add to Reading List' and 'View Reading List' are also available.

Research: DocView allows to compile related documents across categories as well create threads on related documents. Using this feature you can research on related topics and stitch them for reference.

DOC Compile: DocView has document compilation option. You can create a compiled document, add and delete page(s) to the compiled document, delete existing compiled documents, print and e-mail the compiled documents using the option.

Friendly Navigation: DocView gives you page navigation option using the Table of Contents (TOC).

External Backup: DocView has a CD-ROM archiving option. By taking a back-up on a CD-ROM you can play safe against any system crashes or similar disasters leading to loss of critical indexed information. The option has an import and export facility too.

DocView Help File Contents

Security Management: DocView is secure system. Every user has a unique key to access the DocView database.

How To…

Import Document

To import a document

1. Click **Import** from **File** menu. DocView dialog appears.

2. Double Click **Import** icon to see the import document dialog.

3. Click **browse** button on the import document dialog and browse to the folder containing the documents to be imported.

4. Select the files to be imported and click **Categorize** button. Select Category dialog box appears.

5. Select the category in which you want to import the document and hit **OK** on the select category dialog box.

6. Click **Index** button on the import document dialog. Index Fields will be displayed where you can enter the metadata information for the document.

7. Click **Import** button on the Import toolbar to import the documents.

Notes and Tips

+ You must configure the import location before importing the files. *(Click here to see how to configure import location)*

+ You must select a category for importing the documents. If you want to create a category you will have to do so before starting the import operation. *(Click here to see how to create a new category)*

+ You cannot import a document without providing the index information.

Scan Document

To scan a document

1. Click **Scan** from File menu. DocView Scan dialog appears.

2. Click on the **Select File Format** drop down and select the required format for the output scans.

3. Click **Select Source** button. Select Source dialog box appears.

4. On Select Source dialog box select the source can drivers and click **Select** button.

5. Click the **Acquire** button on the DocView Scan dialog to start scanning.

Notes and Tips

+ You must configure the scan location before scanning the documents. *(Click here to see how to configure scan location)*

Open Document

To Open a document

1. Click **Open** from File menu. Open Document dialog appears.

2. Select the category and then the document title of the document you want to open.

3. Click **Open** button on the Open Document dialog.

Export Document

To Export a document

1. Open the document you want to export.

2. Click **Export** from File menu. Export Document dialog appears.

3. Use the browse button to select the **Export Location**.

4. Select the required **Page Range** option.

5. Click Export button on the dialog.

Notes and Tips

+ You can use the following Page Range options to export specific pages of the document

  - **All** – Exports All pages of the document

  - **Current** – Exports the page currently displayed

  - **Page Range** – Export the range of pages you have specified. Here you can specify page numbers and/or page ranges separated by commas. (Example 1-5,10,14-20)

View Document/Page properties

To View Document/Page Properties

1. Open the Document/Page to view properties.

2. Click **File**, point to **Properties** and then select **Document** or **Page**.

3. Document or Page properties dialog box appears as per you selection.

Notes and Tips

+ Document Properties dialog includes Document Name, Created Date/Time, Total Files, Document Size, Index Field and Index Values.

+ Page Properties dialog includes Document Name, Created Date/Time, Filename, File Size, File Type, Bit Depth and Resolution.

Email Document

To Email a document

1. Open the document you want to email.

2. Click **Email** from **File** menu. DocView Email document dialog appears.

3. Type the **recipients email address** in the send to text box.

4. Type your **message** in the Mail Text box.

5. Select the **Page Range** option as per your requirement.

6. Click **Send** button on the dialog.

Notes and Tips

+ You can use the following Page Range options to email specific pages of the document

  - **All** – Emails All pages of the document

  - **Current** – Emails the page currently displayed

  - **Page Range** – Emails the range of pages you have specified. Here you can specify page numbers and/or page ranges separated by commas. (Example 1-5,10,14-20)

Print Document

To Print a document

1. Open the document you want to print.

2. Click **Print** from **File** menu. Print dialog appears.

3. Select the printer name.

4. Select the **Page Range** option as per your requirement.

5. Click **Print** button on the dialog.

Note and Tips

+ You can use the following Page Range options to print specific pages of the document

  - **All** – Prints All pages of the document

- **Pages** – Prints the range of pages you have specified. (Example Page from **1** to **5**)

+ You can set the Printer properties by clicking on the Properties button on the Print dialog

Use Favorites Lists

To Add Documents to Favorites List

1. Open the document you want to add to the favorites list.

2. Click **Add to Favorites** from **List** menu.

To View Favorites

1. Click **View Favorites** from List menu. View favorites dialog appears.

Notes and Tips

+ You can open any of the documents from View Favorites List dialog by selecting it and hitting **OK** button.

Search Documents

You can search for documents on any of the index fields.

Searching documents across all categories or a particular category is possible.

To Search Documents

1. Click **Search** on the menu bar. Search dialog appears.

2. Select the category from the **Select Category** window.

3. Select the Index Field from the **Select Index Field** window.

4. Type the search term in the **Search Term** text box.

5. Click the **Select Criteria** drop down and select search criteria (AND/OR/PHRASE).

6. Click the **Search Results** drop down and select number of search results to be displayed at a time.

7. Select the **date** range (From … To …) if you want to search on date of creation.

8. Hit **Go** button on the search dialog to start search. After search is finished results are displayed.

Notes and Tips

+ Search results displayed are hyperlinked to the respective documents. Double-click on the result to open the required document.

Use Compile Documents

To Create Compile Document

1. Click **Research** on menu bar, point to **Compile** and then select **Add Page**. Add Page To Compiled Documents dialog appears.

2. Click **Create** button on the dialog. Create New Compiled Document dialog box appears.

3. Enter the compiled document title and click **OK** button.

To Add Page To Compiled Documents.

1. Go to the page you want to add to the compiled document.

2. Click **Research** on menu bar, point to **Compile** and then select **Add Page**. Add Page To Compiled Documents dialog appears.

3. Select the compiled document to which you want to add the page displayed.

4. Click **Add Page** button.

DocView Help File Contents

To View Compiled Documents

1. Click **Research** on menu bar, point to **Compile** and then select **View Compiled Book**. View Compiled Documents dialog appears w ith the list of existing compiled books.

Notes and Tips

+ You can open any of the compiled documents by selecting it on the View Compiled Documents dialog and clicking **Open** button.

Use Threads

To create new thread

1. Click **Research** on menu bar, point to **Threads** and then select **Add Page**. Add Thread details dialog appears.

2. On Add Thread details dialog click Add New Thread button. Thread Title dialog box appears.

3. Enter title for the new thread and click OK button.

To add page to threads

1. Go to the page you want to add to thread.

2. Click **Research** on menu bar, point to **Threads** and then select **Add Page**. Add Thread details dialog appears.

3. Click **Add Page** button on Add Thread details dialog.

To view threads

1. Click **View Related Documents** from List menu. View Related Documents dialog appears.

Notes and Tips

+ View Related Documents dialog displays all the threads for the currently open document.

+ You can open any document from any of the threads by selecting it and clicking **Open** button on the View Related Documents dialog.

Delete Documents

To Delete Documents

1. Click **Delete Documents** from Manage menu. Delete Document dialog appears.

2. Select the category and then the document to be deleted.

3. Click **Delete** button on the dialog.

Manage Index

To View/Modify Index

1. Click **Index** from Manage menu. View/Modify Index dialog appears.

2. Click on the Index Field and make changes as required.

3. Click **Save** button on the dialog to save the modifications.

DocView Help File Contents

Manage Categories

To Add New Category

1. Click **Categories** from Manage menu. Manage Categories dialog appears.

2. Click **Add** button on the dialog.

3. Enter name for the category in the category text box.

4. Type the **Index Fields** (if required) and select the **Index Type** .

5. Click **Save** button on the dialog to save the category.

Notes and Tips

+ You can import a predefined Index for new categories by clicking on the **Import Index** button on the Manage Categories dialog.

+ The following are the default Index Fields that cannot be modified.

   - document date

   - keywords

   - description

To modify a category

1. Click **Categories** from Manage menu. Manage Categories dialog appears.

2. Select the category to be modified.

3. Click **Modify** button and make the required modifications.

4. Click **Save** button to save the modifications.

Notes and Tips

+ You cannot modify the Default category.

To Delete Category

1. Click **Categories** from Manage menu. Manage Categories dialog appears.

2. Select the category you want to delete.

3. Click **Delete** button.

Set Configuration

To set configuration

1. Click **Configuration** from System menu. Configuration dialog appears.

2. Type the **scan location** or use browse button to select the scan location.

3. Type the **import location** or use browse button to select the import location.

4. Type the **document format** required for the output scan files.

5. Click **OK** button on the dialog to save the configuration settings.

Change Password

To change password

1. Click **Change Password** from System menu. Change Password dialog appears.

2. Enter the old password in the Old Password text box.

3. Enter the new password in the New Password text box.

4. Re-enter the new password in the Confirm Password text box.

5. Click **OK** button on the dialog.

DocView Help File Contents

Backup Data

You can backup data to any other location incase you are running short of storage space.

To backup data using copy option.

1. Click **Copy** from Backup menu. Copy documents dialog appears.

2. **Type** in the destination text box or click **browse** button to specify destination location, where you want to copy the documents.

3. Select the category and then the document from the select document list.

4. Click on the arrow icon to move the document to the selected document list.

5. Click **Copy** button on the dialog.

Notes and Tips

+ Copy option takes the backup without deleting the source data

To backup data using copy option.

1. Click **Move** from Backup menu. Move documents dialog appears.

2. **Type** in the destination text box or click **browse** button to specify destination location, where you want to move the documents.

3. Select the category and then the document from the select document list.

4. Click on the arrow icon to move the document to the selected document list.

5. Click **Move** button on the dialog.

Notes and Tips

+ Move option takes the backup and deletes the source data

Toolbars

Standard Toolbar

Import Toolbar

Shortcut Keys

Shortcut Key	Description
Ctrl + S	Single Page View
Ctrl + D	Double Page View
Ctrl + L	Full Screen Mode
Esc	Quit Full Screen Mode
Home	Move to First Page
End	Move to Last Page
Page Down	Move to Next Page
Page Up	Move to Previous Page
Ctrl + Arrow keys	Rotate Page
Ctrl + M	Set Zoom Percentage
Alt + V + P	Show/Hide Pane
Ctrl + +	Zoom In
Ctrl + -	Zoom Out
Ctrl + 0	Fit To Page
Ctrl + F4	Close Document
Alt + F4	Quit Application
Ctrl + Up Arrow	Rotate Page by 0°
Ctrl + Right Arrow	Rotate Page by 90°

DocView Help File Contents

Ctrl + Down Arrow	Rotate Page by 180°
Ctrl + Left Arrow	Rotate Page by 270°

Installation/Activation

System Requirements

+ **OS Required:** Windows NT

+ **Memory:** 128 MB RAM minimum

+ **Hard Disk Capacity:** 10 GB minimum

Installation Procedure

To Install Doc View

1. Insert the installation CD ROM in the diskette.
2. Browse to the setup.exe and double-click on it. Installation program starts.
3. Follow the in-screen instructions to complete the installation.