## eDocs Manual

Version 7.18.5

### eDocs Manual

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#### Abstract

This manual presents the eDocs document management system, version 7.18.5. It describes the installation, configuration and usage of the system.

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## Part I. The eDocs Scan Client

The scan client manages batches of documents containing pages scanned from a scanner. You can create new batches by scanning pages from a scanner. Once a batch has been scanned, you can edit the batch, and upload it to the eDocs server.

While editing a batch, you can scan more pages to the batch. You can organise the different pages in the batch into logical documents containing one or more pages. You can also index information about each document in the preconfigured index fields, and even retrieve additional index information about each document from your business operating system or accounting system if your installation has been configured for this.

After processing the batch, you can publish the batch to the server, or share it amoung colleagues for further processing before they publish it.

# **Chapter 1. Installing the Scan Client**

## **1.1. System requirements**

The eDocs Scan Slient is a Java based application that requires the Java Runtime Environment (JRE) version 6 or later to run. The Java Runtime Environment should be installed before attempting to install the eDocs Scan Client.

The Java Runtime Environment can be downloaded from http://java.com/. We recommend that you always use the latest version of Java for security, stability and performance reasons.

The eDocs Scan Client is tested to work on Windows XP, Windows 7 and Windows 8, on both 32 bit and 64 bit processors. A minimum of 256 MB of RAM is suggested for Windows XP, while a minimum of 512 MB of RAM is suggested for Windows 7 and above.

Disk space requirements depend on the quality of images scanned (including image resolution and color), as well as the frequency at which documents will be uploaded to the server. 1 GB of free space should suffice for most use cases.

## **1.2. Installing with Java Web Start**

To install the eDocs Scan Client, click on the *Links* menu from the top right of the eDocs web interface, and click on the *Scan Client* menu item.

|              | Links 👻 | Login |
|--------------|---------|-------|
| HELP         |         |       |
| Documenta    | tion    |       |
| About        |         |       |
| CLIENTS      |         |       |
| Scan Client  | t       |       |
| Print Client |         |       |
|              |         |       |
|              |         |       |

#### Figure 1.1. Links menu item in eDocs web interface

With the Java Runtime Environment correctly installed, this will start the Java Web Start application. Initially, you will see a Java splash screen, as shown in Figure 1.2, "The Java Web Start splash screen", which will be replaced shortly by a download progress dialog, which displays the progress being made while downloading the application files, as shown in Figure 1.3, "The Java Web Start download progress dialog".

#### Figure 1.2. The Java Web Start splash screen



Figure 1.3. The Java Web Start download progress dialog

| Starting application                       | <b>—</b> |
|--|----------|
| Verifying application.                     | (II)     |
| Location: http://demo.virtualpostman.co.za | Cancel   |

Once the application files have downloaded, you will be presented with a security confirmation dialog, as seen in Figure 1.4, "The Java Web Start security confirmation dialog".

Figure 1.4. The Java Web Start security confirmation dialog

| Do you want to run this application?  |                |            |                                  |  |
|---|----------------|------------|----------------------------------|--|
|   | 4              | Name:      | Virtual Postman Scan Client      |  |
|   | <mark>گ</mark> | Publisher: | Virtual Postman CC               |  |
|   | _              | Location:  | http://demo.virtualpostman.co.za |  |
| This application will run with unrestricted access which may put your computer and personal information at risk. Run this application only if you trust the location and publisher above. |                |            |                                  |  |
| ☑ Do not show this again for apps from the publisher and location above   |                |            |                                  |  |
| Û   | More Inform    | nation     | <u>R</u> un Cancel               |  |

This dialog asks you to confirm that you wish to run the application. This is a security feature provided by Java, which notifies you before running applications from the Internet. This dialog will be presented when you first install the software, then again each time the software is upgraded. You can prevent it from coming up each time by selecting the checkbox as shown above.

Then, click on the "Run" button. This completes the installation and launches the eDocs Scan Client. An icon will be automatically created for you on the desktop. You will be able to use this desktop icon to launch the eDocs Scan Client after the initial installation.

#### Figure 1.5. eDocs Scan Client desktop icon



### 1.2.1. Automatic updates

When the eDocs Scan Client starts, it attempt to connect to the server to update itself. If a newer version of the software is avilable on the server, then it will automatically be downloaded and installed.

If, for whatever reason, you experience problems with automatic updates, you can simply click on the link on the web interface to force an update.

# **Chapter 2. Scan Client concepts**

Now that the Scan Client is installed, we will introduce you to the concepts involved in using the Scan Client.

## 2.1. Definitions

In describing the Scan Client we will use some of the following terms:

#### Pages

A page is a single piece of paper scanned into the scan client. A page refers to a single scanned image. One or more pages can be added to a document. Pages are not indexed or uploaded on their own - the documents they belong to are indexed and uploaded.

#### Documents

The Scan Client can combine one or more pages into each logical document. Documents can be indexed and uploaded onto the eDocs server. Each document is archived on the server as a single PDF file, containing one or more pages.

#### Batches

A batch contains all the pages scanned at the same time, and are managed together. If 30 pages are placed in the scanner's feeder, then scanned into the scan client, then all those pages, and the documents created from those pages, will be managed in a single batch. Batches are uploaded and shared as a whole.

#### Document categories, or nodes

On each eDocs system, there are multiple nodes (otherwise known as document categories). Each different type of document should be archived into a separate node. Having separate nodes allows us to segregate the documents by document type, and record information relative to each document type.

If you are scanning contracts between your company and your customers, information you may want to record about each document might include the customer's name, the customer's account number and the contract start and end dates. These fields would not be applicable if you were scanning delivery notes, where delivery note number, invoice number, delivery date etc. would be more relevant.

Scanning documents into different nodes based on the document type allows you to configure different index fields per document type.

All documents in a batch should be of the same document type.

#### Indexing

Indexing is done when values are populated into the index fields configured for the document type you are scanning.

#### Uploading

Once a batch has been scanned, processed and indexed, it is uploaded to the server. This makes the documents in the batch available other users logged into the server.

# **Chapter 3. Scan Client configuration**

This chapter covers the configuration of the eDocs Scan Client.

### 3.1. Authentication

When you use the eDocs Scan Client for the first time, you will be presented with an authentication screen, as shown in Figure 3.1, "eDocs Scan Client authentication window".

In order to log in, type your username and password as provided by your system administrator. This will be the same username and password you use to log into the eDocs web interface.

Figure 3.1. eDocs Scan Client authentication window

| C Login Required   |
|--|
| virtual postman  |
| In order to use this system you must log in using the username and<br>password allocated to you. |
| Username: Password:  |
| Automatically log me in in future  |
| Test Connection Cancel Login   |

If you select the checkbox labeled *Automatically log me in in future* then, once you have successfully logged in, you will not be asked for your username and password again - they will be remembered.

If you do not select the checkbox, you will be asked for your username and password each time the eDocs Scan Client starts up.

The *Test Connection* button allows you to test whether or not communication with the eDocs server can be established.

If the *Automatically log me in in future* is not visible, or if you would like to change the automatic login settings, you can select the *Authentication settings* option from the *Settings* menu of the eDocs Scan Client main window, which will allow you to configure the automatic login feature, as shown in Figure 3.3, "Authentication settings dialog".

#### Figure 3.2. Authentication settings menu item

| 🍓 Virtua  | I Postman Scan Clier | nt v6.17.8-SN/ | APSHOT |          |
|-----------|----------------------|----------------|--------|----------|
| Settings  | Batch                |                |        |          |
| Authentic | ation settings       |                |        |          |
| Downloa   | d settings           |                |        |          |
| Scanner   | settings             |                |        |          |
| Barcode   | settings             |                |        | Category |
| Index set | tings                |                |        |          |
| Batch pro | ocessing settings    |                |        |          |
|           |                      | -              |        |          |
|           |                      |                |        |          |
|           |                      |                |        |          |
|           |                      |                |        |          |

Figure 3.3. Authentication settings dialog

| C Authenticatio | on settings                        |
|-----------------|------------------------------------|
| Server URL:     | https://demo.virtualpostman.co.za/ |
| Current user:   | demo                               |
|                 | Automatically log in on startup    |
|                 | Cancel OK                          |

## 3.2. Centralised configuration

Some of the settings for eDocs Scan Client are managed centrally on the eDocs server. These settings include the the list of nodes the Scan Client user has access to as well as the names and configuration of the indexes for each node.

When the Scan Client is logged into for the first time, these settings are downloaded from the eDocs server automatically. If the central settings on the server change, the new settings need to be re-downloaded to the Scan Client. This can be done by selecting the *Download settings* option from the *Settings* menu in the eDocs Scan Client as shown below:

#### Figure 3.4. Selecting the Download settings menu option

| 🍓 Virtual Postman Scan Clier | nt v6.17.8-SN/ | APSHOT |
|------------------------------|----------------|--------|
| Settings Batch               |                |        |
| Authentication settings      |                |        |
| Download settings            |                |        |
| Scanner settings             |                |        |
| Barcode settings             |                | Categ  |
| Index settings               |                |        |
| Batch processing settings    |                |        |
|                              | •              |        |
|                              |                |        |
|                              |                |        |
|                              |                |        |

Figure 3.5. Central settings downloaded successfully

| Settings Downloaded   | × |
|-----------------------|---|
| i Settings Downloaded |   |
| OK                    |   |

### 3.3. Scanner settings

The scanner settings of the eDocs Scan Client configure how images are scanned into the Scan Client.

To access the scanner settings, select the Scanner settings option from the Settings menu of the Scan Client.

#### Figure 3.6. Selecting the Scanner settings menu option

| 🝓 Virtual Postman Scan Client v6.17.8-SNAPSHOT |  |               |  |
|--|--|---------------|--|
| Settings Batch                                 |  |               |  |
| Authentication settings                        |  |               |  |
| Download settings                              |  |               |  |
| Scanner settings                               |  |               |  |
| Barcode settings                               |  |               |  |
| Index settings                                 |  | Delivery Note |  |
| Batch processing settings                      |  |               |  |
|  |  |               |  |
|  |  |               |  |
|  |  |               |  |

The eDocs Scan Client comes with multiple image sources installed. Each image source allows you to acquire images in a different way. The following images sources are available:

#### TWAIN32

The TWAIN32 image sources uses the standard TWAIN API to communicate to a hardware scanner and scan images from using the scanner. This is the default image source.

File

You can use the Files image source to select files (JPEG, PNG, PDF, TIFF) to import, and the Scan Client will import each image from the selected files as though they were scanned.

Test

The Test image source is for testing, and creates automatically generated test images.

Figure 3.7, "TWAIN32 scanner settings" shows the scanner settings for the TWAIN32 image source. To select a different image source, choose a different entry from the *Scanner Source* drop down.

Figure 3.7. TWAIN32 scanner settings



### 3.3.1. TWAIN32 image source

Figure 3.7, "TWAIN32 scanner settings" shows the settings for the TWAIN32 image source.

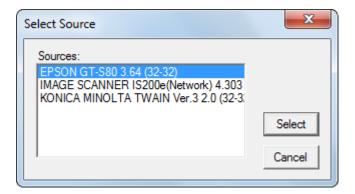
If the *Show TWAIN driver settings before scanning* option is selected, then the settings window from the TWAIN driver will be displayed each time the user scans. This allows the user to make adjustments to the scanner settings before each scan. If the option is not selected, the driver is requested not to display the settings window, and just scan without further prompting.

The *Driver Settings* button can be used to immediately bring up the TWAIN driver settings for the selected TWAIN scanner.

If the *Stop on empty* option is selected, the scanner will be asked to stop scanning when there are no more pages in the feeder. If not selected, the scanner driver will typically show a window asking the user to click *Cancel* once there are no more pages, allowing the user to add more pages to the feeder if desired.

The *Select Scanner* button causes a window to be displayd in which the user can select the TWAIN scanner to use when scanning, as shown in Figure 3.8, "Selecting a TWAIN scanner".

#### Figure 3.8. Selecting a TWAIN scanner



If the desired scanner does not appear in the list, please make sure that the scanner is correctly connected to the computer, ad that the driver software is installed. If an error occurs when scanning, please use this feature to make sure the correct scanner is selected.

### 3.3.2. Files image source

The Files image source allows importing images from a file. The settings for the Files image source are shown in Figure 3.9, "Files image source settings".

#### Figure 3.9. Files image source settings

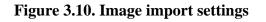
| 🕼 Scanner Settings 🛛 💌    |                      |  |  |  |
|---------------------------|----------------------|--|--|--|
| Scanner Source: Files     | •                    |  |  |  |
| In                        | nage Import Settings |  |  |  |
|                           | No files selected    |  |  |  |
| Delete files after import |                      |  |  |  |
| Select Director           | y Select Files       |  |  |  |
| Cancel OK                 |                      |  |  |  |

The user can select one or more images to import by selecting the Select Files.

The user can select an entire directory from which to import all images by using the Select Directory button.

If the *Delete files after import* option is selected, then each image file that is imported will be deleted if all images are imported successfully.

The exact details of how images are imported can be controlled by using *Image Import Settings* button. This button will cause the window shown in Figure 3.10, "Image import settings" to be displayed.



| 🐔 Image Import Settings 📃  | 3 |  |  |
|--|---|--|--|
| PDF  |   |  |  |
| <ul> <li>Import PDF as scanned pages</li> <li>With this setting, each PDF page will be searched for a single image, and that image will be extracted and used. This is suitable for PDF files obtained from a scanner, or where each page contains an image and an image only.</li> <li>Note that any text or other PDF formatting on the page will not be extracted.</li> </ul> |   |  |  |
| <ul> <li>Render PDF pages to image</li> <li>With this setting, each PDF page will be rendered to an image as a certain resolution. This is suitable for all PDF files, but does require you to configure the resolution at which to render the pages.</li> <li>PDF Render Resolution</li> </ul>  |   |  |  |
| 100 200 300 400  |   |  |  |
| ОК   | ] |  |  |

### 3.3.2.1. PDF image import options

Figure 3.10, "Image import settings" displays the settings for importing PDF files. As described on the screen, there are two methods that can be used when importing PDF files. If the PDF file contains a scanned image, we can open the PDF file, and extract just the image contained on each page. This only works for PDF files where each page contains only a scanned image.

For more complex PDF files, we can render each page to an image, and import that rendered image. Rendering of PDF files to images is done on a best effort basis, as this is not within the scope of the eDocs Scan Client, but is merely added as a covenience feature.

When rendering a PDF file to an image, the user should select the resolution at which to render the PDF file. We have found that a resolution of 100 to 150 usually suffices.

## 3.4. Barcode settings

The barcode settings configure how the eDocs Scan Client finds barcodes in scanned images. To access the barcode settings, select the *Barcode settings* option from the Scan Client's *Settings* menu.

#### Figure 3.11. Barcode settings menu item

| 衝 Virtual Postman Scan Client v6.17.8-SNA |                   |  |  |  |  |
|---|-------------------|--|--|--|--|
| Settings Batch                            |                   |  |  |  |  |
| Server Settings                           |                   |  |  |  |  |
| Download Settings                         |                   |  |  |  |  |
| Scanner                                   |                   |  |  |  |  |
| Barcode                                   |                   |  |  |  |  |
| Index Set                                 |                   |  |  |  |  |
| Batch Pr                                  | ocessing Settings |  |  |  |  |
|   |                   |  |  |  |  |

In Figure 3.12, "Barcode settings dialog" the barcode settings window is shown. The eDocs Scan Client includes two different barcode recognition engines, *ST* and *ZX*. We recommend using the *ST* barcode recognition engine unless specifically advised otherwise.

Figure 3.12. Barcode settings dialog

| 👍 Barcode Settings 🛛 💽 |
|------------------------|
| Barcode Engine: ST 🗨   |
| Barcode Configuration  |
| Barcode Prepend:       |
| Barcode Append:        |
| Cancel OK              |

Using the *Barcode Prepend* and *Barcode Append* fields you can configure a standard prefix or suffix to be prepended or appended to barcodes found in scanned images. This can be used in situations where the barcode on the scanned document does not contain all the desired information to be stored in an index.

For example, if a page has a barcode with a value of 12345, but you would like to record the value of ABC12345 in the index, you would set the *Barcode Prepend* field to ABC.

# **Chapter 4. Scan Client Usage**

## 4.1. Scanning

From our home screen, shown in ???, press the scanner icon at the top left of the home screen to bring up the scanning interface, as shown below in figure Figure 4.1, "eDocs Scan Client Scanner Interface".

#### Figure 4.1. eDocs Scan Client Scanner Interface

|   | 🛓 Scan   |                             | X           |  |  |  |
|---|--|-----------------------------|-------------|--|--|--|
| ریارے<br>ایس Virtual Postman Scan Client v6.4.4-SN/ | Batch Name:  | New batch: 2011-10-30 22:25 |             |  |  |  |
| Settings  | Category:  | Scan Client                 | -           |  |  |  |
| 6688  | <ul> <li>Scanner Settings</li> <li>Barcode Settings</li> </ul> |                             |             |  |  |  |
| Batches   | ▶ Processing   | g Settings                  |             |  |  |  |
| Category  | ▶ Indexes  |                             |             |  |  |  |
|   |  |                             | Cancel Scan |  |  |  |

The batch name is giving to an entire batch of scanning (1 continues flow of documents in the scanner), and may be edited to suit your needs. There will always be a default unique batch name before you edit it.

The Category is the location on the server(virtual postman) where your scans will be sent to once you have verified and uploaded.

Click on "Processing Settings" to choose which type of batch processing you would like to perform, shown below in Figure 4.2, "eDocs Scan Client Scanner Interface".

**Figure 4.2. eDocs Scan Client Scanner Interface** 

| 🛓 Scan           | ×                           |  |  |  |  |  |  |  |
|------------------|-----------------------------|--|--|--|--|--|--|--|
| Batch Name:      | New batch: 2011-10-30 22:25 |  |  |  |  |  |  |  |
| Category:        | Scan Client 🔹               |  |  |  |  |  |  |  |
| Scanner Settings |                             |  |  |  |  |  |  |  |
| ▶Barcode Set     | Barcode Settings            |  |  |  |  |  |  |  |
| ▼ Processing     | Settings                    |  |  |  |  |  |  |  |
| Processor:       | None                        |  |  |  |  |  |  |  |
| ▶Indexes         | None                        |  |  |  |  |  |  |  |
| - Indexes        | Combine Batch               |  |  |  |  |  |  |  |
|                  | Combine Unindexed           |  |  |  |  |  |  |  |
|                  | Split on blank              |  |  |  |  |  |  |  |

- None : this will not use any batch management process and all pages will be scanned individually.

- Combine Batch : this will put all pages scanned in this instance into one multi-paged document

- Combine Unindexed : this will put all unbarcoded pages following a barcoded page into one document as attachments to the barcoded page.

- Split on blank : this will combine pages into one document until a blank page is scanned, and then create a new document.

Click on the "Scan" button when you are ready to scan.

Once all your documents have been scanned, all pages will be listed in a table on the left side of the scan Client, and clicking on an individual document will display a preview of that page on the right hand side, as show below in Figure 4.3, "eDocs Scan Client After Scanning".

| 🖆 Batch Processing | ( marked a real          | Street Stands | - Instruction for  | the last          | 2.2.2.2.2       |   |          | x        |
|--------------------|--------------------------|---------------|--------------------|-------------------|-----------------|---|----------|----------|
| Tools              |                          |               |                    |                   |                 |   |          |          |
| 🛃 👌 🎄              | ×                        |               |                    |                   |                 |   |          | P        |
|                    | Waybill no<br>1554382197 | Account code  | Customer reference | <b>+ +</b>        |                 | • | <u>A</u> | 2 유      |
|                    | 372624345<br>1012D2643   |               |                    |                   |                 |   |          | <b>^</b> |
|                    |                          |               |                    |                   |                 |   |          |          |
|                    |                          |               |                    |                   |                 |   |          |          |
|                    |                          |               |                    |                   |                 |   |          |          |
|                    |                          |               |                    | VirtualP          | ostman v6.3     |   |          |          |
|                    |                          |               |                    |                   | ed Test Image   |   |          |          |
|                    |                          |               |                    | Barcode Num       | ber: 0554382197 |   |          |          |
|                    |                          |               |                    | Berver: http://le |                 |   |          |          |
|                    |                          |               |                    | Bystem user:      | Dinah           |   |          |          |
|                    |                          |               |                    |                   |                 |   |          |          |
|                    |                          |               |                    |                   |                 |   |          |          |

Figure 4.3. eDocs Scan Client After Scanning

### 4.2. Verifying

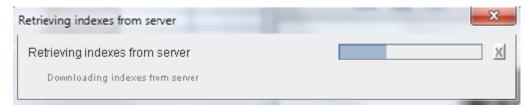
Verifying is the process in which the document name is matched against your company database and all supporting information (e.g. account number, invoice number etc.) is returned to the scan client dashboard. Verification only takes place after you have scanned in some pages. Click the green 'tick' at the top left to start verifying your scans. As shown below in Figure 4.4, "eDocs Scan Client Verifying".

#### Figure 4.4. eDocs Scan Client Verifying

| Satch Processing                             |
|--|
| Tools  |
| → <b>₹</b> 🍐 🏂 🗲                             |
| Number of Waybill no Account code Customer r |

You will see a progress bar whilst the verification process is still busy, as shown below in Figure 4.5, "eDocs Scan Client Verifying Progress".

#### Figure 4.5. eDocs Scan Client Verifying Progress



You will receive confirmation that the verification process has ended.

Refer to the table that contains all your scanned documents. The indexes should now have data in them. As shown below in Figure 4.6, "eDocs Scan Client Verifying Done".

Figure 4.6. eDocs Scan Client Verifying Done

| 🔔 Batch Proc | essing       |              | Same Chart - 1     |      | - |     |             |     |          |        | X                 |
|--------------|--------------|--------------|--------------------|------|---|-----|-------------|-----|----------|--------|-------------------|
| Tools        |              |              |                    |      |   |     |             |     |          |        |                   |
|              | s 🎄 💂        |              |                    |      |   |     |             |     |          |        | $\mathcal{P}_{1}$ |
| Number of p  | . Waybill no | Account code | Customer reference |      |   |     | <b>□</b> ¥Π | 1   | 0        | 0      | 0                 |
| 1            | 9605090488   | DSC123       | 12344KJHj223       |      |   | * * | *           | ⋳⋥⋼ | <b>A</b> | $\sim$ | 200               |
| 1            | 0298953214   | BSC124       | 1431421SGSDF123123 | 1000 |   |     |             |     |          |        |                   |
| 1            | 1539105268   | SDD145       | 2132DSFSFDS13213   |      |   |     |             |     |          |        | -                 |
|              |              |              |                    |      |   |     |             |     |          |        | _                 |

## 4.3. Uploading

Now that all the indexes for your scanned documents have been updated, close the current screen to return to the scan client home screen. Under batches, you will see the batch that you just scanned in and verified. As shown below in ???.

Figure 4.7. eDocs Scan Client Publishing

| Settings          Settings         Solution       Solution         Batches         Category       Scan Time       Batch Name         Waybills       2011-08-12 14:35:41       New batch: 2011-08-12 14 | Virtual Postman Scan Cl | ient v6.3.0-SNAPSHOT |                          |
|--|-------------------------|----------------------|--------------------------|
| Batches Category Scan Time Batch Name  | Settings                |                      |                          |
| Category Scan Time Batch Name  | 6 6 š                   | P                    |                          |
|  | Batches                 |                      |                          |
| Wavbills 2011-08-12 14:35:41 New batch: 2011-08-12 14  | Category                |                      |                          |
|  | Waybills                | 2011-08-12 14:35:41  | New batch: 2011-08-12 14 |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |
|  |                         |                      |                          |

Clicking on the line of the batch you want to publish (upload to the server), will activate more buttons at the top left of the scan client. This will allow you to edit (pencil), delete (X) or send (World) your batch to the server. As shown below in Figure 4.8, "eDocs Scan Client Publishing Selected Index".

#### Figure 4.8. eDocs Scan Client Publishing Selected Index

| Settings |                     |                         |
|----------|---------------------|-------------------------|
| 🍝 🍝 🍝 🦨  |                     |                         |
| Batches  |                     |                         |
| Category | Scan Time           | Batch Name              |
| Waybills | 2011-08-12 14:35:41 | New batch: 2011-08-1214 |
|          |                     |                         |

Note : The buttons will only affect the row you have currently selected.

## Part II. The eDocs Web Interface

The web interface of eDocs is the portal where you can access to view and download documents that are imported to the eDocs server, index or re-index, or send them off to an external location using e-mail or FTP.

Using the web interface you can go through all the nodes and documents that you have permisions to and check the quality of documents that are being scanned. You can also download documents off the server using this interface should you need to give records to your clients or colleagues. You can also send off documents via e-mail and FTP. This will deliver documents directly to the client or wherever you wish to send it using these platforms described.

## **Chapter 5. Web Interface concepts**

Now that eDocs is installed, we will introduce you to the concepts involved in using the web interface.

### 5.1. Definitions

In describing the web interface we will use some of the following terms:

#### Node

A node is a document type in which documents where imported to from your ERP/accounting system, scanned in from the Scan Client, or uploaded directly through the web interface.

#### Category

A category is a parent to a node. It will contain a whole set of nodes that relate to that category. A eDocs system can have multiple categories.

#### Index

An index is a column within the document listing that will describe certain attributes of the document and can be used when searching for documents that have specific value. The indexes are not predefined and can be changed as and when neccessary.

#### Envelopes

An envelope is the packaging of the of a document and it destination details, subject and message body. This is used when sending e-mails, FTPs, print jobs or zipping documnets you want to download onto your machine.

#### Uploading

Uploading is the act of putting a document onto the server from your machine or external drive.

# **Chapter 6. Logging In And Quick** Search

This chapter covers logging into eDocs and how to use the quick search functionality

## 6.1. Login

Once eDocs has been installed, you will have to go to go the URL or I.P. address of the server. When you go to this page, you will arrive at the following page: Figure 6.1, "Login Screen"

Links 🚽

Login

In order to log in, type your username and password as provided by your system administrator.

| Figure 6.1. Login Sc | :een              |  |
|----------------------|-------------------|--|
| Virtual Postman      |                   |  |
|                      |                   |  |
|                      | Please log in     |  |
|                      | Username Password |  |
|                      | Login             |  |

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License & Terms of Use

Once you have successfully logged in, you will be redirected to the following home page: Figure 6.2, "Home Page"

#### Figure 6.2. Home Page

| DOCUMENTS         |   | No current envelo  | 000                   | Environte        |          | -             |   | 0-11-11-1-1 | C                    |        | <b>.</b> . |         |
|-------------------|---|--------------------|-----------------------|------------------|----------|---------------|---|-------------|----------------------|--------|------------|---------|
| mail Archive      | ~ | No current envelo  | he                    | Envelope type    | pe: Choo | se One        |   | Collation:  | Attached document of | only 🔻 | Create er  | nvelope |
| Scan Client       | ~ | Quick search:      |                       |                  |          | Last 3 months | • | Search      |                      |        |            |         |
| tandard Documents | ~ | Please use the sea | and field above to a  | and for days     |          | Last o months |   |             |                      |        |            |         |
| ENVELOPES         |   | Please use the sea | Irch field above to s | search for docur | nents.   |               |   |             |                      |        |            |         |
| Dutbox            |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
| ent items         |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
| rint spool        |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
| ips               |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |
|                   |   |                    |                       |                  |          |               |   |             |                      |        |            |         |

### 6.2. Quick Search

On the the home screen of eDocs, you will be able to quickly search for documents if you know the document number or another index stored for that document on eDocs.

You can acheive this by simply typing that value into the "Quick search" box, modifying the date accordingly and clicking the search button. This will then return a result or set of results matching that value as shown below: Figure 6.3, "Quick Search"

| Figure | 6.3. | Quick | Search |
|--------|------|-------|--------|
|--------|------|-------|--------|

| Virtual Postmai                   | n Ba | atches Upload  |  |                      |                 |                 |                                   | Links <del>v</del> de | emo Log     | ogou |
|-----------------------------------|------|--|--|----------------------|-----------------|-----------------|-----------------------------------|-----------------------|-------------|------|
| DOCUMENTS<br>Email Archive        | ~    | No current envelope  | Envelope type: Ch  | oose One             | ,               | Collation:      | Attached document only            | ▼ Cre                 | ate envelop | pe   |
| Scan Client<br>Standard Documents | ~    | Quick search: 7200   |  |                      |                 |                 |                                   |                       |             |      |
| ENVELOPES<br>Outbox               |      | Filters  |  |                      |                 |                 |                                   |                       |             |      |
| Sent items                        |      | <ul> <li>Archive Date</li> <li>2014-07-24 14:55:16</li> </ul>        | Invoice Number<br>IN000000000000000000000000000000000000 | Account Code<br>7200 | Total<br>290,11 | Sales Rep<br>RB | Customer Name<br>CANAM INDUSTRIES | User<br>SYSTEM        |             | Info |
| Print spool                       |      | 2014-07-24 14:55:05  | IN0000000000000000000000004                              | 7200                 | 525,01          | RB              | CANAM INDUSTRIES                  | SYSTEM                |             | Info |
| Zips                              |      | <ul> <li>2014-07-21 10:04:43</li> <li>2014-07-21 10:04:39</li> </ul> | INVCORP011<br>INVCORP010                                 | 7200<br>7200         | 162,38<br>23,82 | RB<br>RB        | CANAM INDUSTRIES                  | SYSTEM<br>SYSTEM      |             | Info |
|                                   |      | 2014-07-21 10:04:32  | INVCORP007   | 7200                 | 497,95          | RB              | CANAM INDUSTRIES                  | SYSTEM                | View II     | Info |
|                                   |      | 2014-07-21 10:04:18  | INVCORP001<br>tems Export to •                           | 7200                 | 362,64          | RB              | CANAM INDUSTRIES                  | SYSTEM                | View Ir     | Info |

From here, you should be able to view any of the documents by clicking on the "View" link on the line item that you are looking for.

# **Chapter 7. Advanced Searching**

In this chapter we will cover how to navigate through the Web Interface and also how to do more specific searches using filters.

## 7.1. Selecting Nodes

When logging in to eDocs, you will see a list of node categories on the left panel. Selecting a node category will expand it and show you the list of nodes that fall under that category, as shown in Figure 7.1, "Node List".

Figure 7.1. Node List

| DOCUMENTS   Email Archive   Scan Client   Standard Documents   Invoice   Statement   UPD Invoice   EnvELOPES EnvELOPES | Virtual Postman  | Batches Upload Lin                         | ks <del>-</del> | demo      | Logout |
|--|--|--|-----------------|-----------|--------|
| Outbox<br>Sent items<br>Print spool<br>Zips  | Email Archive<br>Scan Client<br>Standard Documents<br>Invoice<br>Sage AR Invoice<br>Statement<br>UPD Invoice<br>ENVELOPES<br>Outbox<br>Sent items<br>Print spool | Quick search:     Last 3 months     Search | •               | Create er | velope |

If you click on any of the nodes under the node category, a list of all the documents that are in that node will appear on the screen sorted by the archive date from newest to oldest. A list will appear in your browser when you click on a node as shown in Figure 7.2, "Node Search Result".

Figure 7.2. Node Search Result

| Email Archive                     | ~ | No current envelope | Envelope type:                         | Choose One   |        | ▼ Colla   | ation: Attached document only | Creat  | e envel | ope   |
|-----------------------------------|---|---------------------|--|--------------|--------|-----------|-------------------------------|--------|---------|-------|
| Scan Client<br>Standard Documents | ~ | Quick search:       |  | Last 3 mor   | nths   | ▼ Search  | 1                             |        | Actio   | ons 🗸 |
| Invoice                           |   | Filters             |  |              |        |           |                               |        |         |       |
| Sage AR Invoice                   |   | Archive Date        | Invoice Number                         | Account Code | Total  | Sales Rep | Customer Name                 | User   | View    | Info  |
| Statement                         |   | 2014-07-24 14:55:19 | IN000000000001                         | 1520         | 351,58 | RW        | MR. STEPHEN KERSHAW           | SYSTEM | View    | Info  |
|                                   |   | 2014-07-24 14:55:16 | IN0000000000000000000009               | 7200         | 290,11 | RB        | CANAM INDUSTRIES              | SYSTEM | View    | Infe  |
| UPD Invoice                       |   | 2014-07-24 14:55:14 | IN0000000000000000008                  | 7100         | 415,68 | RB        | BASHAW BULLDOZING             | SYSTEM | View    | Inf   |
| ENVELOPES                         |   | 2014-07-24 14:55:12 | IN000000000000000000000000000000000000 | 1400         | 460,06 | RB        | COASTAL ELECTRIC COMPANY      | SYSTEM | View    | Inf   |
| Outbox                            |   | 2014-07-24 14:55:10 | IN00000000000000000000006              | 1200         | 406,27 | BB        | MR. RONALD BLACK              | SYSTEM | View    | Inf   |
| Sent items                        |   | 2014-07-24 14:55:07 | IN0000000000000000000005               | 1105         | 69,28  | BB        | BARGAIN MART - OAKLAND        | SYSTEM | View    | Inf   |
|                                   |   | 2014-07-24 14:55:05 | IN000000000000000000000000000000000000 | 7200         | 525,01 | RB        | CANAM INDUSTRIES              | SYSTEM | View    | Inf   |
| Print spool                       |   | 2014-07-24 14:55:03 | IN000000000000000000000000000000000000 | 1200         | 220,96 | BB        | MR. RONALD BLACK              | SYSTEM | View    | Inf   |
| Zips                              |   | 2014-07-24 14:55:01 | IN0000000000000000000002               | 1200         | 757,75 | BB        | MR. RONALD BLACK              | SYSTEM | View    | Inf   |
|                                   |   | 2014-07-24 14:54:58 | CR000000000000000000000000000000000000 | 7100         | 162,38 | RB        | BASHAW BULLDOZING             | SYSTEM | View    | Inf   |
|                                   |   | C Showing 1 to 10 o | f 13 items Rows per page               | Hi i Pa      | age 1  | of 2 🕨    | Export to 🔺                   |        |         |       |

### 7.2. Using Filters

For more specific searching, you can use filters to focus on a select group of documents using the indexes to define exactly what you want eDocs to output onto your browser.

To set the filters, you need to click on the "Filters" button just below the "Quick search" box. When you click on the filters button, the following screen will appear. Figure 7.3, "Filtering"

| DOCUMENTS          |                     |  |              |        |                            |                              |         |         |     |
|--------------------|---------------------|--|--------------|--------|----------------------------|------------------------------|---------|---------|-----|
| Email Archive      | No current envelope | Envelope type:                         | Choose One   |        | <ul> <li>Colla</li> </ul>  | tion: Attached document only | ▼ Creat | e envel | ope |
| Scan Client        |                     |  |              |        |                            |                              |         |         |     |
| Standard Documents | Quick search:       |  | Last 3 mon   | iths   | <ul> <li>Search</li> </ul> | 1                            |         | Actio   | ons |
| Invoice            | Filters             |  |              |        |                            |                              |         |         |     |
| Sage AR Invoice    | Add Apply           |  |              |        |                            |                              |         |         |     |
| Statement          | Archive Date        | Invoice Number                         | Account Code | Total  | Sales Rep                  | Customer Name                | User    | View    | In  |
| UPD Invoice        | 2014-07-24 14:55:19 | IN000000000001                         | 1520         | 351,58 | RW                         | MR. STEPHEN KERSHAW          | SYSTEM  | View    | In  |
| INVELOPES          | 2014-07-24 14:55:16 | IN000000000000000000009                | 7200         | 290,11 | RB                         | CANAM INDUSTRIES             | SYSTEM  | View    | In  |
|                    | 2014-07-24 14:55:14 | IN00000000000000000008                 | 7100         | 415,68 | RB                         | BASHAW BULLDOZING            | SYSTEM  | View    | In  |
| Dutbox             | 2014-07-24 14:55:12 | IN000000000000000000007                | 1400         | 460,06 | RB                         | COASTAL ELECTRIC COMPANY     | SYSTEM  | View    | In  |
| ent items          | 2014-07-24 14:55:10 | IN00000000000000000000006              | 1200         | 406,27 | BB                         | MR. RONALD BLACK             | SYSTEM  | View    | In  |
| rint spool         | 2014-07-24 14:55:07 | IN000000000000000000005                | 1105         | 69,28  | BB                         | BARGAIN MART - OAKLAND       | SYSTEM  | View    | In  |
| ips                | 2014-07-24 14:55:05 | IN0000000000000000000004               | 7200         | 525,01 | RB                         | CANAM INDUSTRIES             | SYSTEM  | View    | In  |
|                    | 2014-07-24 14:55:03 | IN000000000000000000003                | 1200         | 220,96 | BB                         | MR. RONALD BLACK             | SYSTEM  | View    | In  |
|                    | 2014-07-24 14:55:01 | IN000000000000000000002                | 1200         | 757,75 | BB                         | MR. RONALD BLACK             | SYSTEM  | View    | In  |
|                    | 2014-07-24 14:54:58 | CR000000000000000000000000000000000000 | 7100         | 162,38 | RB                         | BASHAW BULLDOZING            | SYSTEM  | View    | In  |

From here you will be able to start adding filters. Filters work on searching for index values that match the criteria you give the filter. When you click "Add", it will start by asking you which index you want to set a filter on, as shown in Figure 7.4, "Selecting an index".

| DOCUMENTS          |   |                                |  |              |        |                            |                              |        |           |       |
|--------------------|---|--------------------------------|--|--------------|--------|----------------------------|------------------------------|--------|-----------|-------|
| Email Archive      | ~ | No current envelope            | Envelope type:                         | Choose One   |        | <ul> <li>Colla</li> </ul>  | tion: Attached document only | Creat  | te envelo | ope   |
| Scan Client        | ~ |                                |  |              |        |                            |                              |        |           |       |
| Standard Documents | ~ | Quick search:                  |  | Last 3 mon   | ths    | <ul> <li>Search</li> </ul> |                              |        | Actio     | ons - |
| Invoice            |   | Filters                        |  |              |        |                            |                              |        |           |       |
| Sage AR Invoice    |   | × Account Code                 | •                                      |              |        |                            |                              |        |           |       |
| Statement          |   | Choose One<br>Archive Date     |  |              |        |                            |                              |        |           |       |
| UPD Invoice        |   | Archive Date<br>Invoice Number | er                                     | Account Code | Total  | Sales Rep                  | Customer Name                | User   | View      | Inf   |
|                    |   | Total                          | 01                                     | 1520         | 351.58 | RW                         | MR. STEPHEN KERSHAW          | SYSTEM | View      | Infe  |
| ENVELOPES          |   | 2 Sales Rep<br>Customer Name   |  |              |        |                            |                              |        |           |       |
| Dutbox             |   | 2 User                         | 00000009                               | 7200         | 290,11 | RB                         | CANAM INDUSTRIES             | SYSTEM | View      | Inf   |
| ent items          |   | 2014-07-24 14:55:14            | IN0000000000000000000008               | 7100         | 415,68 | RB                         | BASHAW BULLDOZING            | SYSTEM | View      | Inf   |
| ent items          |   | 2014-07-24 14:55:12            | IN000000000000000000000000000000000000 | 1400         | 460,06 | RB                         | COASTAL ELECTRIC COMPANY     | SYSTEM | View      | Inf   |
| rint spool         |   | 2014-07-24 14:55:10            | IN000000000000000000000000000000000000 | 1200         | 406,27 | BB                         | MR. RONALD BLACK             | SYSTEM | View      | Inf   |
| ips                |   | 2014-07-24 14:55:07            | IN00000000000000000000005              | 1105         | 69,28  | BB                         | BARGAIN MART - OAKLAND       | SYSTEM | View      | Inf   |
|                    |   | 2014-07-24 14:55:05            | IN000000000000000000000004             | 7200         | 525,01 | RB                         | CANAM INDUSTRIES             | SYSTEM | View      | Inf   |
|                    |   | 2014-07-24 14:55:03            | IN000000000000000000000000000000000000 | 1200         | 220,96 | BB                         | MR. RONALD BLACK             | SYSTEM | View      | Inf   |
|                    |   | 2014-07-24 14:55:01            | IN000000000000000000000000000000000000 | 1200         | 757,75 | BB                         | MR. RONALD BLACK             | SYSTEM | View      | Inf   |
|                    |   | 2014-07-24 14:54:58            | CR000000000000000000000000000000000000 | 7100         | 162,38 | RB                         | BASHAW BULLDOZING            | SYSTEM | View      | Inf   |

#### **Figure 7.4. Selecting an index**

Once you have selected the index you want to filter on, you will be required to select a relation criteria. This depicts how you want to filter the that index, there are multiple options you can choose from, as shown in Figure 7.5, "Criteria Selection".



| OCUMENTS          |                     |                  |   |        |    |                            |                               |        |           |     |
|-------------------|---------------------|------------------|---|--------|----|----------------------------|-------------------------------|--------|-----------|-----|
| mail Archive      | No current envelope | Enve             | lope type: Choose One                                   |        |    | <ul> <li>Colla</li> </ul>  | ation: Attached document only | Creat  | te envelo | ope |
| ican Client 🗸     |                     |                  |   |        |    |                            |                               |        |           |     |
| tandard Documents | Quick search:       |                  | Last 3  | months |    | <ul> <li>Search</li> </ul> | 1                             |        | Actio     | ons |
| Invoice           | Filters             |                  |   |        |    |                            |                               |        |           |     |
| Sage AR Invoice   | × Account Code      | •                | is  | •      |    |                            |                               |        |           |     |
| Statement         | Add Apply           |                  | Choose One  |        |    |                            |                               |        |           |     |
| UPD Invoice       | Archive Date        | Invoice Number   | is not<br>contains                                      |        |    | Sales Rep                  | Customer Name                 | User   | View      | Ir  |
| INVELOPES         | 2014-07-24 14:55:1  | 9 IN000000000000 | starts with<br>ends with                                |        | 58 | RW                         | MR. STEPHEN KERSHAW           | SYSTEM | View      | Ir  |
| utbox             | 2014-07-24 14:55:10 | 6 IN00000000000  | is less than<br>is greater than                         | 1      | 1  | RB                         | CANAM INDUSTRIES              | SYSTEM | View      | Ir  |
| ent items         | 2014-07-24 14:55:14 | 4 IN00000000000  | is less than or equal to<br>is greater than or equal to | 3      | 68 | RB                         | BASHAW BULLDOZING             | SYSTEM | View      | h   |
| ent items         | 2014-07-24 14:55:12 | 2 IN00000000000  |   |        | 6  | RB                         | COASTAL ELECTRIC COMPANY      | SYSTEM | View      | h   |
| rint spool        | 2014-07-24 14:55:10 | D IN00000000000  |   | 2      | 27 | BB                         | MR. RONALD BLACK              | SYSTEM | View      | h   |
| ips               | 2014-07-24 14:55:0  | 7 IN000000000000 | 00000005 1105   | 69,28  | 3  | BB                         | BARGAIN MART - OAKLAND        | SYSTEM | View      | h   |
|                   | 2014-07-24 14:55:0  | 5 IN00000000000  | 00000004 7200   | 525,0  | )1 | RB                         | CANAM INDUSTRIES              | SYSTEM | View      | h   |
|                   | 2014-07-24 14:55:03 | 3 IN00000000000  | 00000003 1200   | 220,9  | 6  | BB                         | MR. RONALD BLACK              | SYSTEM | View      | h   |
|                   | 2014-07-24 14:55:0  | 1 IN000000000000 | 00000002 1200   | 757,7  | 75 | BB                         | MR. RONALD BLACK              | SYSTEM | View      | Ir  |
|                   | 2014-07-24 14:54:5  | B CR00000000000  | 00000001 7100   | 162.3  | 38 | RB                         | BASHAW BULLDOZING             | SYSTEM | View      | Ir  |

Once you have set the criteria, another text box will appear. In this text box you must enter the value that you want your criteria to match. After typing th value, you must click on the "Apply" button for the filter to be set and a list of documents matching that filter will be shown on your browser, as shown in Figure 7.6, "Filter Results".

| /irtual Postma                    | n - D  | atches Upload           |  |               |        |            |                        | Links <del>-</del> de | emo       | Logou |
|-----------------------------------|--------|-------------------------|--|---------------|--------|------------|------------------------|-----------------------|-----------|-------|
| DOCUMENTS<br>Email Archive        | ~      | No current envelope     | Envelope type: Ch                      | oose One      | ,      | Collation: | Attached document only | ▼ Cre                 | eate enve | elope |
| Scan Client<br>Standard Documents | ×<br>^ | Quick search:           |  | Last 3 months | •      | Search     |                        |                       | Act       | tions |
| Invoice                           |        | Filters                 |  |               |        |            |                        |                       |           |       |
| Sage AR Invoice                   |        | × Account Code          | ▼ is                                   | •             | 1200   |            |                        |                       |           |       |
| Statement                         |        | Add Apply               |  |               |        |            |                        |                       |           |       |
| UPD Invoice                       |        | Archive Date            | Invoice Number                         | Account Code  | Total  | Sales Rep  | Customer Name          | User                  | View      | In    |
| NVELOPES                          |        | 2014-07-24 14:55:10     | IN000000000000000000000000000000000000 | 1200          | 406,27 | BB         | MR. RONALD BLACK       | SYSTEM                | View      | In    |
| outbox                            |        | 2014-07-24 14:55:03     | IN000000000000000000000000000000000000 | 1200          | 220,96 | BB         | MR. RONALD BLACK       | SYSTEM                | View      | In    |
|                                   |        | 2014-07-24 14:55:01     | IN000000000000000000000000000000000000 | 1200          | 757,75 | BB         | MR. RONALD BLACK       | SYSTEM                | View      | In    |
| ent items                         |        | 2014-07-24 14:54:52     | CN0000000000001                        | 1200          | 129,88 | BB         | MR. RONALD BLACK       | SYSTEM                | View      | In    |
| Print spool                       |        | C Showing 1 to 4 of 4 i | tems Export to 🔺                       |               |        |            |                        |                       |           |       |
| Zips                              |        |                         |  |               |        |            |                        |                       |           |       |

#### Figure 7.6. Filter Results

You are not limited to only having one filter. You can set multiple filters to narrow down your search results as needed. To accheive this, you simply have to click on the "Add" button again, follow the above process again, and you will get a more defined list based on the new filter you set, as shown in Figure 7.7, "Multiple Filters".

#### **Figure 7.7. Multiple Filters**

| DOCUMENTS         |   | No current envelope | Enur            |                |               |        | Callation  |                        |        |          |      |
|-------------------|---|---------------------|-----------------|----------------|---------------|--------|------------|------------------------|--------|----------|------|
| Email Archive     | ~ |                     | Enve            | lope type: Cho | oose One      |        | Collation: | Attached document only | ▼ Cre  | ate enve | lope |
| Scan Client       | ~ | Quick search:       |                 |                | Last 3 months | •      | Search     |                        |        | Act      | ions |
| tandard Documents | ^ | QUICK SEARCH.       |                 |                | Last 3 months |        | Search     |                        |        | Act      | IONS |
| Invoice           |   | Filters             |                 |                |               |        |            |                        |        |          |      |
| Sage AR Invoice   |   | Account Code        | •               | is             |               | 1200   |            |                        |        |          |      |
| Statement         |   | × Total             | T               | is less than   |               | 400    |            |                        |        |          |      |
| UPD Invoice       |   | Add Apply           |                 |                |               |        |            |                        |        |          |      |
| INVELOPES         |   | Archive Date        | Invoice Numb    | er             | Account Code  | Total  | Sales Rep  | Customer Name          | User   | View     | In   |
| utbox             |   | 2014-07-24 14:55:03 | IN000000000     | 000000003      | 1200          | 220,96 | BB         | MR. RONALD BLACK       | SYSTEM | View     | In   |
| ent items         |   | 2014-07-24 14:54:52 | CN000000000     | 0001           | 1200          | 129,88 | BB         | MR. RONALD BLACK       | SYSTEM | View     | In   |
| Print spool       |   | Showing 1 to 2 of 2 | items Export to |                |               |        |            |                        |        |          |      |

# **Chapter 8. Envelopes**

Envelopes are the packages that are used to send documents from the server to other destination. With eDocs, you can create various types of envelopes depending on how you want this envelope to be delivered.

To create an envelope, you simply click on the "Envelope Type" drop down and select the type of envelope, and then click "Create Envelope", "Collation" allows you to select if you want any child documents to be automatically attached to the envelope. Child documents are documents which belong to the parent document, such as a POD that belongs to an invoice. The following different types of envelopes are available for use on eDocs as shown in the selection list in Figure 8.1, "Envelope Types"

#### Figure 8.1. Envelope Types

| eDocs Upload             |   |                                    |  |              |                        | Links 🗸      | demo     | Logou     |
|--------------------------|---|------------------------------------|--|--------------|------------------------|--------------|----------|-----------|
| DOCUMENTS<br>Scan Client | ~ | No current envelope Envelope type: |  | T            | Collation: Attached do | ocument only | Create e | envelope  |
| Standard Documents       | ^ | Quick search:                      | Choose One<br>Email<br>FTP<br>ISO9660<br>Print |              | ▼ Search               |              |          | Actions - |
| Job Card                 |   | Filters                            | Zip  | Account Code | Date                   | User         | View     | Info      |
| Statement                |   |                                    | INV55326                                       | KEN002       | 27/MAY/2014            | SYSTEM       | View     | Info      |
| ENVELOPES<br>Outbox      |   |                                    | INV01789                                       | WILE2167     |                        | SYSTEM       | View     | Info      |
| Sent items               |   |                                    | INV01970                                       | WILE2167     |                        | SYSTEM       | View     | Info      |
| Print spool              |   |                                    |  |              |                        |              |          |           |
| Zins                     |   |                                    |  |              |                        |              |          |           |

## 8.1. E-mail Envelopes

E-mail envelopes are the most used envelope type as you can use this to send documents directly from eDocs to a specific client or colleagues e-mail address and the documents will appear as an attachment.

## 8.2. FTP Envelopes

FTP envelopes are used to send documents to clients FTP servers where they can be pulled by the customer and used as required. eDocs uses the normal FTP convention for sending documents to FTP server, which ftp:// username:password@ftp.client.com/desired/path.

## 8.3. Print Envelopes

Print envelopes are used for printing documents directly from eDocs without having to send or save them anywhere off the server. They can be sent directly to your print driver.

## 8.4. Zip Envelopes

Zip envelopes are used for downloading documents directly to your computer in an organised package, as well as an index.html page to help navigate through the zip file once downloaded from the server.

Once you have clicked create envelope, you can either click "Attach selected" or "Attach all". Attach all will attach all documents shown in the list and attach selected will only attach documents which have been selected. You can select specific documents you want to attach and click on "Attach selected" as shown in Figure 8.2, "Attaching Documents"

| DOCUMENTS<br>Email Archive        | ~ | Current envelope: Email<br>0 documents attached. |                      |              |              |                    | Attac        | ch selected Att | tach all Ca | ancel | View  |
|-----------------------------------|---|--|----------------------|--------------|--------------|--------------------|--------------|-----------------|-------------|-------|-------|
| Scan Client<br>Standard Documents | ~ | Quick search:                                    |                      | Last 3       | months •     | Search             |              |                 |             | Act   | tions |
| Invoice                           |   | Filters  |                      |              |              |                    |              |                 |             |       |       |
| Sage AR Invoice                   |   | Archive Date                                     | Invoice Number       | Invoice Date | Account Code | Customer           | Order Number | Total           | User        | View  | Info  |
| Statement                         |   | 2015-10-09 00:00:00                              | INV01789             | 2012-01-01   | WILE2167     | Wile E. Coyote INC | XP-78        |                 | SYSTEM      | View  | Info  |
| UPD Invoice                       |   | 2015-10-09 00:00:00                              | 122/2011             | 11/10/20111  | 2            | IP/CEM/2011        | 3            | 2050            | demo        | View  | Infe  |
|                                   |   | 2014-10-25 15:40:15                              | 7835411474           | 7835411474   | 7835411474   | 7835411474         | 7835411474   | 7835411474      | admin       | View  | Info  |
| ENVELOPES                         |   | 2014-10-25 15:40:15                              | 6624264943           | 6624264943   | 6624264943   | 6624264943         | 6624264943   | 6624264943      | admin       | View  | Info  |
| Outbox                            |   | 2014-10-25 15:40:15                              | 2188758609           | 2188758609   | 2188758609   | 2188758609         | 2188758609   | 2188758609      | admin       | View  | Inf   |
| Sent items                        |   | 2014-10-25 15:38:22                              | 7429483424           | 7429483424   | 7429483424   | 7429483424         | 7429483424   | 7429483424      | admin       | View  | Inf   |
| Print spool                       |   | 2014-10-25 15:38:22                              | 1479919534           | 1479919534   | 1479919534   | 1479919534         | 1479919534   | 1479919534      | admin       | View  | Inf   |
|                                   |   | 2014-10-25 15:38:22                              | 1450386800           | 1450386800   | 1450386800   | 1450386800         | 1450386800   | 1450386800      | admin       | View  | Infe  |
| Zips                              |   | 2014-10-21 15:29:33                              | 8192796424           |              |              |                    |              |                 | demo        | View  | Infe  |
|                                   |   | 2014-10-21 15:29:33                              | 0350403428           |              |              |                    |              |                 | demo        | View  | Inf   |
|                                   |   | C Showing 21 to 30 of                            | 34 items Rows per pa | age 🔺 😽 📢    | Page 3 of 4  | Export to          |              |                 |             |       |       |

**Figure 8.2. Attaching Documents** 

Version 6.17.8-SNAPSHOT Copyright © 2013 Virtual Postman. All rights reserved. Documentation

Once you have clicked *Attach selected*, the document count will show you how many documents have been attached to the current envelope, as well the the envelope type, as shown in Figure 8.3, "Count" below. You can continue to add documents to this envelope until you have attached all the documents you need.

#### Figure 8.3. Count

| DOCUMENTS     |   |  |                 |            |        |      |
|---------------|---|--|-----------------|------------|--------|------|
| Email Archive | ~ | Current envelope: Email<br>4 documents attached. | Attach selected | Attach all | Cancel | View |
| Scan Client   | ~ |  |                 |            |        |      |

Once you have attached all the documents you need, you can then click on "View", which will take you to the below page Figure 8.4, "Count", from here you can type the e-mail or FTP destination of where you wish to send the documents.

#### Figure 8.4. Count

| DOCUMENTS     |   |  |                 |            |        |      |
|---------------|---|--|-----------------|------------|--------|------|
| Email Archive | ~ | Current envelope: Email<br>4 documents attached. | Attach selected | Attach all | Cancel | View |
| 0.011.1       | ~ | + uocuments attached.                            |                 |            |        |      |
| Scan Client   | • |  |                 |            |        |      |

If you have created a zip or print envelope, there will be an option to send documents directly to the "Zips" or "Print spool" as shown in Figure 8.5, "Zip Envelopes" and Figure 8.6, "Print Envelopes" below.

#### Figure 8.5. Zip Envelopes

| Virtual Postman            | В | tches Upload  |             | Links 🗸 demo Logout |
|----------------------------|---|---|-------------|---------------------|
| DOCUMENTS<br>Email Archive | • | Delete selected   |             |                     |
| Scan Client                | ~ | Created Date  | Туре        | Download            |
| Standard Documents         | ~ | 2014-11-06 12:36:21     Showing 1 to 1 of 1 items Export to | Zip Archive | Download            |
| ENVELOPES                  |   |   |             |                     |
| Outbox                     |   |   |             |                     |
| Sent items                 |   |   |             |                     |
| Print spool                |   |   |             |                     |
| Zips                       |   |   |             |                     |

### Figure 8.6. Print Envelopes

| Virtual Postman            | E | atches Upload                           |             | Links <del>-</del> demo Logout |
|----------------------------|---|---|-------------|--------------------------------|
| DOCUMENTS<br>Email Archive | ~ | Deleted selected                        |             |                                |
| Scan Client                | ~ | Created Date                            | Description | View                           |
|                            |   | 2014-11-06 12:37:50                     |             | View                           |
| Standard Documents         | ~ | C Showing 1 to 1 of 1 items Export to A |             |                                |
| ENVELOPES                  |   |   |             |                                |
| Outbox                     |   |   |             |                                |
| Sent items                 |   |   |             |                                |
| Print spool                |   |   |             |                                |
| Zips                       |   |   |             |                                |

## Part III. The eDocs Administration

The administration section of eDocs is the where administrators can set up users, roles and other adiministrative features provided by eDocs. Administrative settings can only be seen by users who have been assigned an admin role.

Using the the adminisitration section you can setup the mail server which eDocs will use when sending e-mails to customers, which ftp directories must be polled for documents which will be archived on eDocs, create internal and external users that will log onto the system, aissgin roles to the users which will control what types of documents users will have access to, and also be able to view reports from eDocs.

# **Chapter 9. User Administration**

This chapter will cover how to create users and assign roles to users.

This chapter will also cover how cover how to remove users, change user passwords, and set whether this will be an internal user or external user.

## 9.1. Adding Users

To add a user on eDocs, you click on Admin at the top of the page, then select *User administration* as shown in Figure 9.1, "Adding Users".

#### Figure 9.1. Adding Users

| Virtual Postman  | Batches Upload    | Reports Admin - |                              |          |         |      | Links 🚽        | admin Logou |
|--|-------------------|-----------------|------------------------------|----------|---------|------|----------------|-------------|
| <u>Virtual Postman</u> » Administrati<br>User administrati |                   |                 |                              |          |         |      |                | • Add user  |
| ADMIN MENU   | <b>↓</b> Username | Name            | Email                        | External | Enabled | Edit | Enable/Disbale | Delete      |
| System Administration                                      | a110              | ALESHA BLANKETS | customer@bakerstransport.co. | true     | Yes     | Edit | Disable        | Delete      |
| Node Administration  | admin             | Admin           | matthew@virtualpostman.co.za | false    | Yes     | Edit | Disable        | N/A         |
| Document Queues  | anthonylouis      | anthony         | anthonyalek@yahoo.com        | false    | Yes     | Edit | Disable        | Delete      |
| User Administration  | asd               | asd             | asd@dsa.com                  | true     | Yes     | Edit | Disable        | Delete      |
| Dela Administration  | chris             | chris           | chirozvacn@hotmail.co.za     | false    | Yes     | Edit | Disable        | Delete      |
| Role Administration  | commsdemo         | commsdemo       | commsdemo                    | false    | Yes     | Edit | Disable        | N/A         |
| Delivery Profiles  | davidm            | David M         | davidm@dovetail.co.za        | false    | Yes     | Edit | Disable        | Delete      |
|  | demo              | demo            | sales@virtualpostman.co.za   | false    | Yes     | Edit | Disable        | N/A         |

You then click "Add user" on the top right and screen will pop up where you will be required to insert four(4) mandatory fields, and two(2) optional fields. The mandatory fields required are the "Username", "Name", "Email address" and "Password" for the new user, and the optional fields are "Telephone number(direct)" and "Telephone number(switchboard)" for the user. After entering these details, you click the "Save" button and the user will be created as shown in Figure 9.2, "Creating a user".

#### Figure 9.2. Creating a user

| Virtual Postman » Administration »<br>User administration |                     |                                   |                 |                          |             |                |              |                    | O Add user       |
|---|---------------------|-----------------------------------|-----------------|--------------------------|-------------|----------------|--------------|--------------------|------------------|
| ADMIN MENU<br>System Administration                       | ↓ Username<br>a110  | Na Add use                        | r               |                          | ×           | Enabled<br>Yes | Edit<br>Edit | Enable/Disbale     | Delete           |
| Node Administration                                       | admin               | Ad                                | Username        | andre                    |             | Yes            | Edit         | Disable            | N/A              |
| Document Queues   | anthonylouis<br>asd | ant                               | Name            | Andre Benjamin           |             | Yes<br>Yes     |              | Disable<br>Disable | Delete<br>Delete |
| Role Administration                                       | chris<br>commsdemo  | chr                               | Email address   | andre@benjamin.co.za     |             | Yes            |              | Disable<br>Disable | Delete<br>N/A    |
| Delivery Profiles   | davidm              | Da                                | Password        | andre                    |             | Yes            |              | Disable            | Delete           |
|   | demo<br>doc del     | der<br>doc Phone                  | number (direct) | 0111234567               |             | Yes<br>Yes     |              | Disable<br>Disable | N/A<br>Delete    |
|   | exs<br>exsal        | exs                               | Phone number    | 0111234567               |             | Yes<br>Yes     | Edit<br>Edit | Disable<br>Disable | Delete<br>Delete |
|   | ext                 | ext                               | (switchboard)   |                          |             | Yes            |              | Disable            | Delete           |
|   | external frigo      | ext<br>frig                       |                 |                          | Cancel Save | Yes<br>Yes     | Edit<br>Edit | Disable<br>Disable | Delete<br>Delete |
|   | johnc<br>kchabangu  | John Claussen<br>Katlego Chabangu |                 | ohnkolaussen@hotmail.com | false       | Yes<br>Yes     |              | Disable<br>Disable | Delete<br>N/A    |

Once you have created the user, you will be able to edit the users' settings and assign them a role if they are an internal user, or assign them permissions on a node and set up an index match if they are an external user.

### 9.1.1. Creating Internal Users

Internal users will be assigned roles, these roles will govern which document types the user will be able to see. To assign a role to an internal user you click on "Edit" in the user administration menu and click on the "Roles" tab and select the required role as shown in Figure 9.3, "Internal User Config" and click "Add".

| Virtual Postman               | Batches L        | pload R               | eports /   | Admin 👻 |
|-------------------------------|------------------|-----------------------|------------|---------|
| Virtual Postman » Administrat | ion » User admin | istration » Ec        | dit user   |         |
| Edit user                     |                  |                       |            |         |
|                               |                  |                       |            |         |
| ADMIN MENU                    | Ger              | neral Role            | s          |         |
| System Administration         |                  |                       |            |         |
| Node Administration           | Add Role         | : View                |            |         |
| Document Queues               |                  | Choose C<br>Administ  |            |         |
| Document Queues               | Role             | Client log            | jin        |         |
| User Administration           |                  | COMMSI<br>DEMO        | DEMO       |         |
| Role Administration           |                  | Index<br>LM FINA      | NCE        |         |
| Delivery Profiles             |                  | Namibia               | ScanClient |         |
| Delivery Fronies              |                  | Redwood<br>rmnandi    |            |         |
|                               |                  | SAGE                  |            |         |
|                               |                  | Salaries<br>Scan clie | nt         |         |
|                               |                  | View                  |            |         |

Figure 9.3. Internal User Config

### 9.1.2. Creating External Users

External users will be assigned node access, and under this node you will be able to set and index match. Index match sets that the user will only be able to view documents in that node that belong to a particular account number or numbers.

You set up the external user by clicking "Edit" in the User Administration menu on the users entry, then click the "External user?" checkbox as shown in Figure 9.4, "External User Config" and click save.

| Virtual Postman                           | Admin 🗸                                |  | Links 🗸 | admin | Logout |
|---|--|--|---------|-------|--------|
| Virtual Postman » Administra<br>Edit user | tion » User administration » Edit user |  |         |       |        |
| ADMIN MENU<br>System Administration       | General Node Access                    |  |         |       |        |
| Node Administration                       | Name                                   | Andre Benjamin<br>The full name of the user.   |         |       |        |
| User Administration                       | Email address                          | andre@benjamin.com<br>The email address used by the user.  |         |       |        |
| Delivery Profiles                         | Phone number (direct)                  | 0111234567<br>The users direct phone number. This is optional, and is used in outgoing messages if so configured.                      |         |       |        |
|   | Phone number (switch board)            | D111234567<br>The switch board phone number at the user's location. This is optional, and is used in outgoing messages if so configure | d.      |       |        |
|   | Password                               | The new password for the user. Leave blank to leave the password unchanged.  |         |       |        |
|   |  | External user? Whether or not this user is an external user (client access). External users will have a limited view of the system.    |         |       |        |
|   |  | Save   |         |       |        |

Figure 9.4. External User Config

After clicking save, you will see that a "Node Access" tab will appear at the top, if you click on this tab you will have the option to select which nodes the user will have access to as shown in Figure 9.5, "Node Access Setup".

#### Figure 9.5. Node Access Setup

| Virtual Postman                              | Admin 🗸                             |             | Links 🗸 | admin | Logout |
|--|-------------------------------------|-------------|---------|-------|--------|
| Virtual Postman » Administratio<br>Edit user | n » User administration » Edit user |             |         |       |        |
| ADMIN MENU<br>System Administration          | General Node Access                 |             |         |       |        |
| Node Administration                          | Node Name                           | Has Access? | Edit    |       |        |
| Document Queues                              | Print Client                        |             |         |       |        |
|  | Print Job                           | no          | Edit    |       |        |
| User Administration                          | Scan Client                         |             |         |       |        |
| Role Administration                          | Waybills                            | no          | Edit    |       |        |
| Delivery Profiles                            |                                     |             |         |       |        |

From here you can click "Edit" on the desired node, click on the "Allow access to this node?" checkbox, click the "Save" button, then click on the "Add filter for this node?" drop down, select an index to match and click what value must be matched to the index as shown in Figure 9.6, "Node Access Setup" and click "Add".

Figure 9.6. Node Access Setup

| Virtual Postman                            | Admin 🗸  |             | Links 👻 | admin | Logout |
|--|--|-------------|---------|-------|--------|
| Virtual Postman » Administrat<br>Edit user | ion » User administration » Edit user  |             |         |       |        |
| ADMIN MENU<br>System Administration        | General Node Access  |             |         |       |        |
| Node Administration                        | Node Name  | Has Access? | Edit    |       |        |
| Document Queues                            | Print Client   |             |         |       |        |
| User Administration                        | Print Job<br>Scan Client   | no          | Edit    |       |        |
| Role Administration                        | Waybills   | yes         | Edit    |       |        |
| Delivery Profiles                          | Node Access: Waybills Allow access to this node? Save Filters Add filter for index: Account code • ABC123 [Remove] |             |         |       |        |

## **Chapter 10. Role Administration**

This chapter is going to cover how to create and manage roles on eDocs.

Roles can be accessed by going clicking "Admin" and selecting "Role Administration", as shown in Figure 10.1, "Adding Users".

#### Figure 10.1. Adding Users

| Virtual Postman               | Batches Upload Repor        | s Admin -   | Links 🗸   | admin     | Logout  |
|-------------------------------|-----------------------------|---|-----------|-----------|---------|
| DOCUMENTS<br>Bakers Documents | No current envelope         | System Administration<br>nve Node Administration<br>Document Queues | nt only 🔻 | Create en | ivelope |
| Email Archive                 | Quick search:               | User Administration<br>Role Administration                          |           |           |         |
| Print Client                  | ✓ Please use the search fie | ab Delivery Profiles  |           |           |         |

When you land in the Role Administration page, you will see a list of the current avalailbe roles. All the roles can be edited to allow access to specific nodes. To edit a role you simply click on "Edit", which will take to the general role settings as shown in Figure 10.2, "Adding Users".

#### Figure 10.2. Adding Users

| Virtual Postman  | Admin 👻                                 |      | Links <del>-</del> admin Logout |
|--|---|------|---------------------------------|
| Virtual Postman » Administration<br>Role Administratio |   |      | O New role                      |
| ADMIN MENU   |   | Edit | Delete                          |
| System Administration                                  | Administrators                          | Edit | Delete                          |
| Node Administration                                    | Client login                            | Edit | Delete                          |
| Document Queues  | Index                                   | Edit | Delete                          |
| User Administration                                    | Scan client                             | Edit | Delete                          |
| Role Administration                                    | View                                    | Edit | Delete                          |
| Delivery Profiles                                      | C Showing 1 to 5 of 5 items Export to • |      |                                 |

From this page you can change the name of the role, set whether the role is an administrative one and whether the role can view reports as shown in Figure 10.3, "Adding Users".

Figure 10.3. Adding Users

| Virtual Postman Adr  | nin +   | Links 🗸 | admin | Logout |
|--|---|---------|-------|--------|
| Virtual Postman » Administration »<br>Edit role: Administra  | Role administration » Edit role: Administrators   |         |       |        |
| ADMIN MENU<br>System Administration<br>Node Administration<br>Document Queues<br>User Administration<br>Role Administration<br>Delivery Profiles | General       Node permissions         Role name       Administrators         The name of the role       Is administrator         Is administrator       Is administrator         Image: Can view reports       Image: Quality control supervisor |         |       |        |
|  | Save  |         |       |        |

Once you have set all the general settings for the role, you can then alter the roles node permissions. To set the node permissions, you click on the "Node permissions" tab, and you will see all the available nodes. From here you can set specific permissions for each node as shown in Figure 10.4, "Adding Users".

#### Figure 10.4. Adding Users

| Virtual Postman A  | udmin 🗸      |             |        |         |                | Links 🗸           | admin Logout |
|--|--------------|-------------|--------|---------|----------------|-------------------|--------------|
| Virtual Postman » Administration » Role administration » Edit role: Administrators Edit role: Administrators |              |             |        |         |                |                   |              |
| ADMIN MENU<br>System Administration<br>Node Administration<br>Document Queues                                | General Node | permissions |        |         |                |                   |              |
|  | Node Name    | View        | Upload | Reindex | View Envelopes | Quality Assurance | Delete       |
|  | Print Client |             |        |         |                |                   |              |
| User Administration  | Print Job    |             |        |         |                |                   |              |
| Role Administration  | Scan Client  |             |        |         |                |                   |              |
| Delivery Profiles  | Waybills     |             |        |         |                |                   | V            |
|  | Save         |             |        |         |                |                   |              |