

# User's Guide



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## An introduction to Secure-Archives



## **Basic Concepts on Document Management**

The concept of document management can be described as the creation, incorporation or digitalization of documents coming from different means and its subsequent classification, storage, processing, accessing and distribution, using a computational system. Typical operations of a document management system include:

Scan documents generated outside or within the organization and it stores them as electronic documents;

- Bring in or incorporate into the storage system electronic documents generated from different applications;
- Add in index fields in order to classify stored documents;
- View stored images in an hierarchical structure of the system, allowing techniques such as zooming, rotate, a preview of the pages, etc.;
- Add on annotations or electronic stamps on to the images without modifying the content of the original document;
- Allow the sending of stored reproduction of documents by means of e-mail or fax.

## **Types of Documents**

The document manager Secure-Archives allows you to manage all kinds of electronic documents. In order to access the different types of documents, you must have the required and associated applications thereof.

The documents that are on paper are scanned in order to create a true image thereof and this allows the qualified users to access through the infrastructure of the organization's communication.

## **Secure-Archives**

Secure-Archives by e-volusoft is a revolutionary service that transforms physical files into digital images allowing the effective management of commercial documents and corporate knowledge. It is based on the Internet, but it has secure and easy to implement features, that guarantees the confidentiality of your documents.

Secure-Archives by e-volusoft is the global solution that makes it an easy and reliable task to manage and store documents. It communicates with the external servers of Secure-Archives and it operates through a secure connection with Internet or with a virtual private network - VPN.

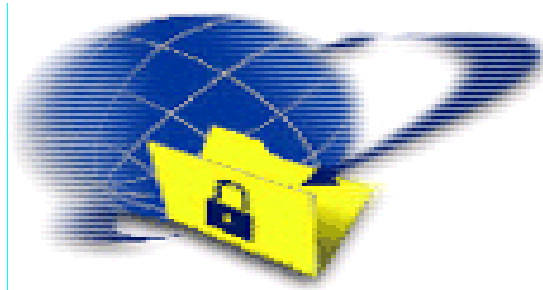
## **DocuManager**

DocuManager transforms physical files into digital images allowing the effective management of commercial documents and corporate knowledge. It is multilingual, can be accessed thru the internet and it is very rentable.

DocuManager is the global solution that makes it an easy and reliable task to manage and store documents. It can operate through a secure connection with Internet or with a virtual private network - VPN.

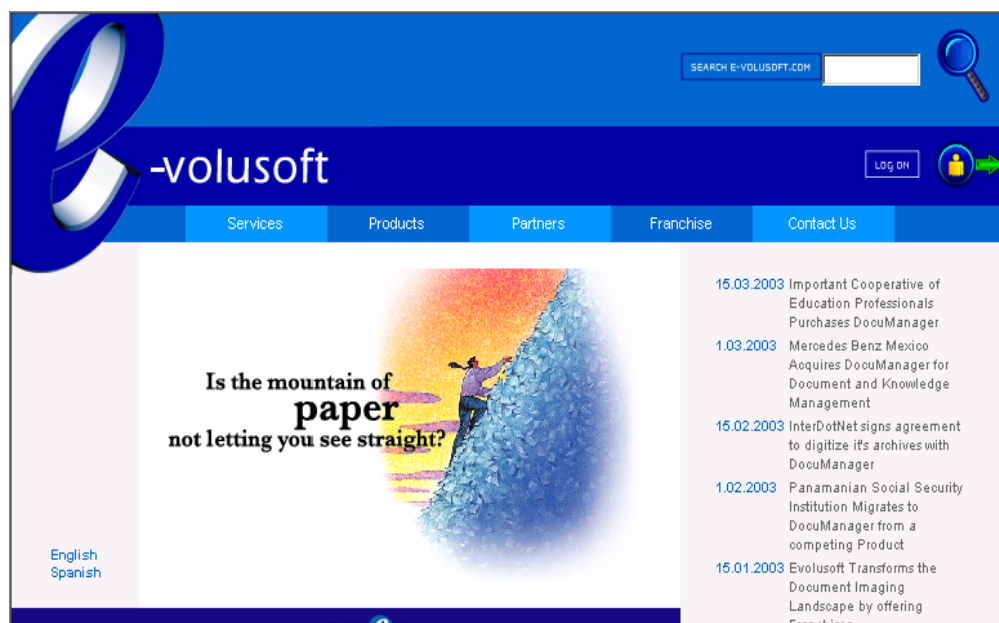
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# Using Secure-Archives



## Initiating the Session

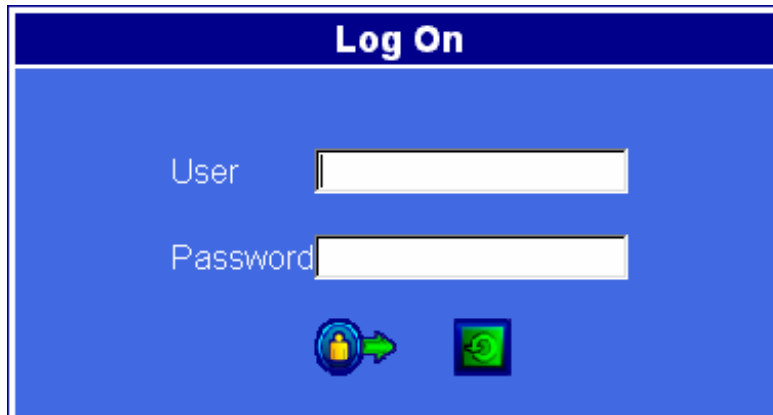
In order to initiate a session of Secure-Archives go into the explorer and write in the following address <http://www.evolusoft.com>.



Click Log On to access our Secure-Archives section.

With the option “Log on” the user’s registry window shall appear “Log on”, in which you should write the user name and the password provided to you by the administrator of the system. Click on “Send”.

- To rectify any error, click on “Reset” to eliminate the information of the fields and to initiate the procedure once again.



To terminate a session, select from the menu bar "Session" the option "Log Off". The system shall close the present work session and it shall show you the page of the user's registry "Log On" in order to initiate a new session.

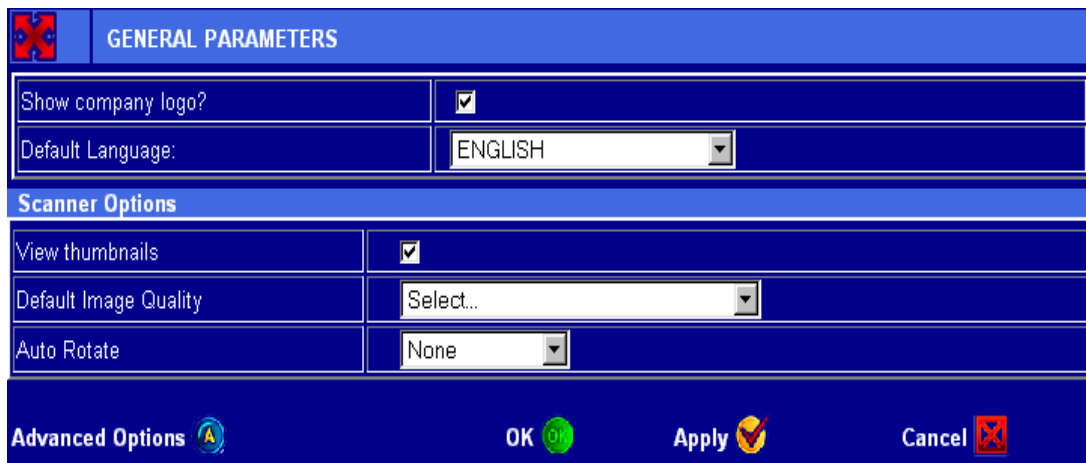
## The User's Menu

The user's menu is on the top part of the window. Each one of the options of the user's menu shall be explained in detail in the following sections of this manual.



## General Parameters

Secure-Archives allows you to determine general parameters by clicking first on the option of the menu bar "User Profile" then select the option of "General Parameters".



The “language” option allows you to determine the language the web client of Secure-Archives will use to interact with the user.

The “Show Thumbnails” option allows you to view the pages of a document at the time of scanning them. The specimens appear in a corner of the scanning window.

The scanning options allow you to specify the quality and the orientation of a scanned document. These are default values for each document that is scanned.

Secure-Archives also has, the advanced personalized options of the application that allows you to specify texts and images such as annotations and stamps.

Advanced Options			
[Rubber Stamp Properties]			
Background Color		Select..	
Font Color		Select..	
#	Image	Text	Value
1	<input type="radio"/>	<input type="radio"/>	
2	<input type="radio"/>	<input type="radio"/>	
3	<input type="radio"/>	<input type="radio"/>	
4	<input type="radio"/>	<input type="radio"/>	
5	<input type="radio"/>	<input type="radio"/>	
6	<input type="radio"/>	<input checked="" type="radio"/>	
7	<input type="radio"/>	<input type="radio"/>	
8	<input type="radio"/>	<input type="radio"/>	

To create annotations and stamps:

Click on “Show Advanced options” located on the bottom of the screen of “General Parameters”. The Advanced Options shall then appear.

Choose the color of the background and the characters of the annotation.

To create an annotation, click on the “Text” option and write in the “Value” field the text of the annotation.

To create a stamp, click on the “Image” option and specify the route and the name of the file where the system should obtain said image

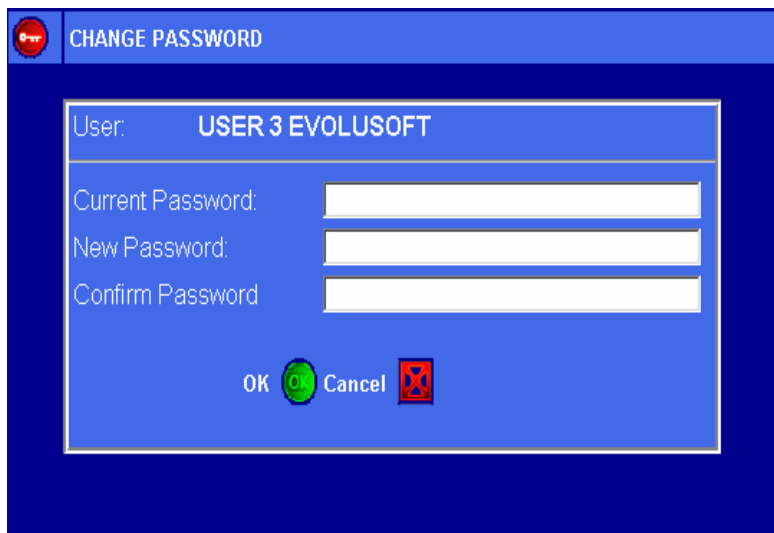
After filling out the fields, click on “OK”.

In order to hide the advanced option screen, click on “Hide Advanced Options”.

## Changing the User’s Password

Secure-Archives allows all users to make changes to the users’ passwords for greater security.


To change your password, click on the menu bar “User’s Profile” and select the “Change the Password” option. The system will show you the following page:

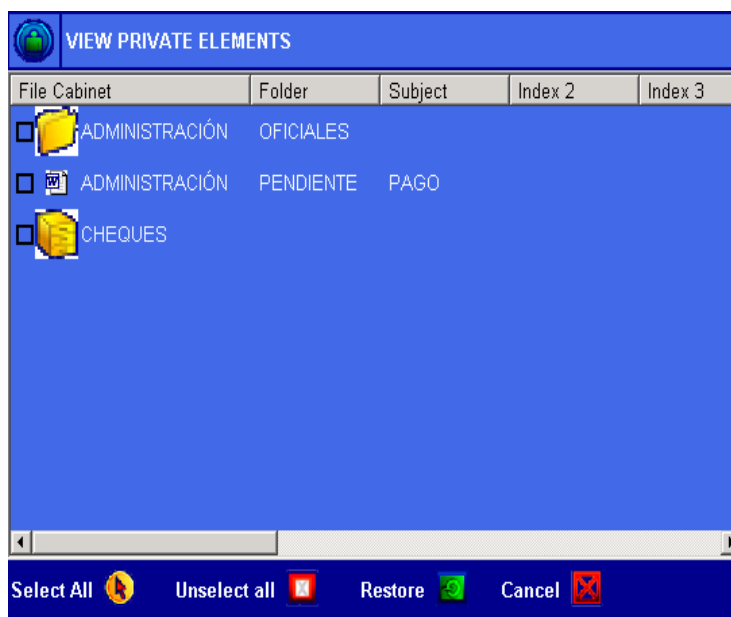


Write your current password, the new password and its confirmation in the assigned fields. Then click on “OK” in order to update the information in the system.



## View Private Elements



This window shows the user all the objects that have been created with the private option.

On the User menu, click on Preferences and select the option  “View Private Elements”.



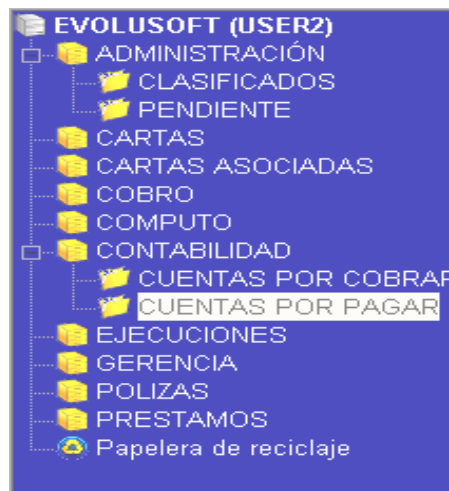
File Cabinet	Folder	Subject	Index 2	Index 3
<input type="checkbox"/> ADMINISTRACIÓN	OFICIALES			
<input type="checkbox"/> ADMINISTRACIÓN	PENDIENTE	PAGO		
<input type="checkbox"/> CHEQUES				

Click on the element that you want to be public. It is possible to select all of the elements by clicking [  ]  
"Select All"; to unselect all of the elements, click on [  ] "Unselect All".

Press the button [  ] "Restore" for the system to set the selected elements as public. Click on [  ] "Cancel" to cancel the operation.

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## Hierarchical Structure



## Hierarchical Structure of Storage

In order to facilitate the storage and access of documents, Secure-Archives establishes its hierarchical structure composed of the elements described below:

### ***File Cabinet***

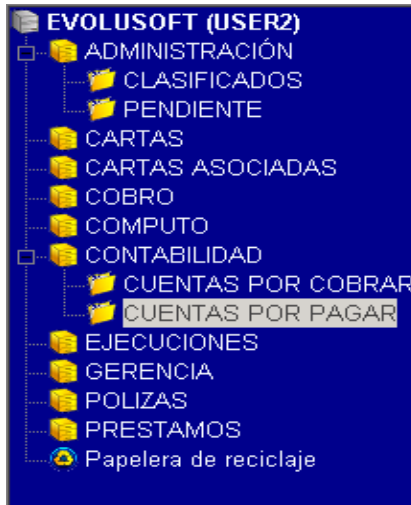
The file cabinet of archives allows you to group in a unit, documents within a logical and centralized structure. They maintain an analogy with the paper file cabinets in a firm. A file cabinet represents the file clerk and it is the key to the structure in which the documents are grouped and that have a relation with the cabinet. The file cabinets may carry the same name of the elements of that organizational unity: name of the firm, branch, department, work team, etc.



### ***Folders***

This is the second level of the hierarchical structure. Its purpose is to classify the contents of the documents within a file cabinet in order to give quick access thereto. The folders maintain an analogy with the paper folders used to classify and store documents that are on paper. A folder allows you to group documents that belong to a specific entity such as: client, invoices, contracts, suppliers, etc.

The system also allows you to create within any folder, other levels of folders.



## Creating a Hierarchical Structure

The Administrator of the System is in charge of creating and maintaining the hierarchical structure.

### *Creating a File Cabinet*

The following steps indicate how to create a file cabinet:

Click on the menu bar "File Cabinet" that is on the upper part of the screen.

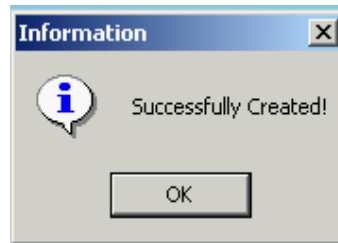


Select the option [N] "New". The system will show you the following window "Create File Cabinets".

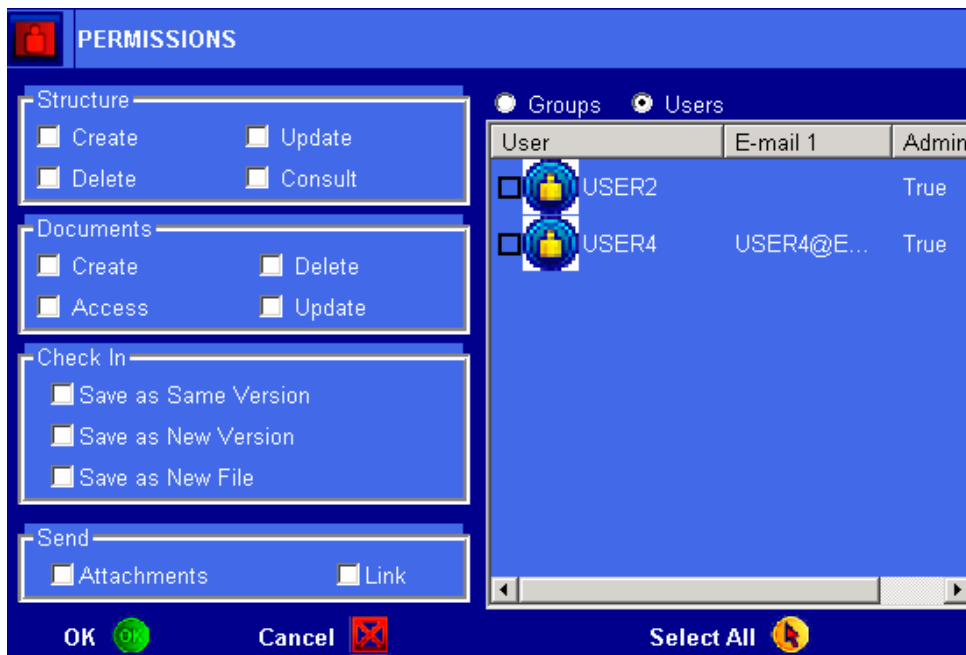
In the field "Name", write the name of the new file cabinet. Write and confirm the password in order to protect the file cabinet from being accessed by unauthorized persons.


With the window “Create File Cabinets”, it is possible to determine if the new file cabinet is private or public. Click on the “Private” option in order to show the file cabinet in the hierarchical structure when the session initiates with your user name and password. If the option is not used, then the other users may view the file cabinet.



Click on “OK” to confirm the creation of the file cabinet. Secure-Archives shall show you a confirmation message informing you of the success of the operation. To create a file cabinet and to continue creating other file cabinets, click on “Apply”. If you wish to cancel the operation, click on “Cancel” in order to close the window.



### ***Permission Assignment***




Check the actions that you will allow the users to do on this cabinet and select the groups that these permissions will apply to. If you want to assign these permissions to individual users, select the User radio button on top of the list. If you want to select all of the elements, click on [  ] “Select All”.

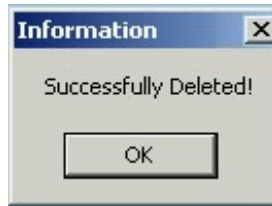
To assign the permissions click on [  ] OK. If you want to close the window without assigning the permissions you can click “Cancel” [  ]. You can always modify the permissions using the Administration menu.

## ***Deleting a File Cabinet***

In order to delete a file cabinet from the hierarchical structure:

Select the file cabinet you wish to delete

Click on the icon  "Erase" and on the screen there shall appear a message indicating that the elimination process was successful.



## ***Renaming the File Cabinet***

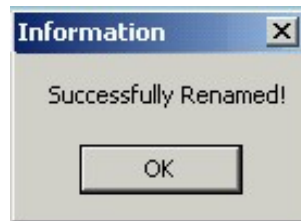
To rename a file cabinet:

Click on the file cabinet you wish to rename.

Click on the "Rename" option of the menu bar "File Cabinet". The name of the file cabinet shall appear in the edition mode.

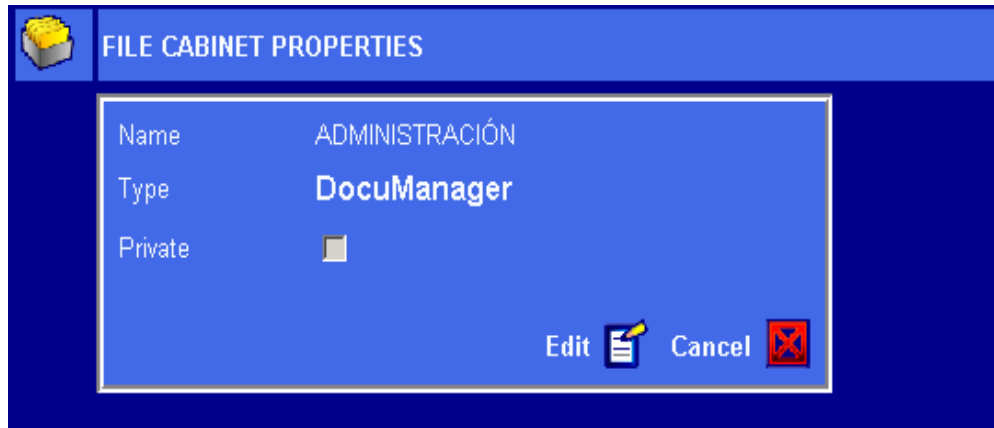
Write the new name of the file cabinet and click on the "Enter" key. Then, a message indicating that the re-naming of the file cabinet was successful shall appear on the screen.

NOTE: Press the "enter" key when re-naming files cabinets in order to confirm the action. Otherwise, when you select another file cabinet, the latter shall appear in the edition mode.



## ***The File Cabinet's Properties***

In order to consult or change the properties of a file cabinet, select the file cabinet in the hierarchical structure and click on the "Properties" option of the menu bar "File Cabinet". The system shall show the properties window of the file cabinet where the name and type of file cabinet is shown. It also indicates if the file cabinet is private.



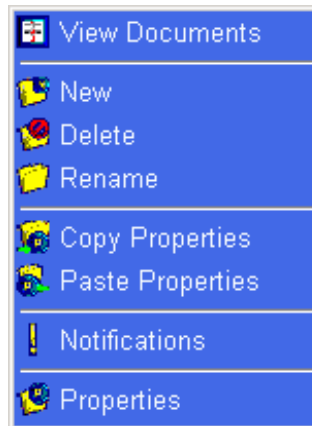
Click the “Edit” button to change the properties of the file cabinet. The “Updating the File Cabinet” window then appears. After effecting the required changes, click on the “OK” button to save the changes and maintain the window on the screen or click on “Cancel” in order to close the window.

### ***Creating Folders***

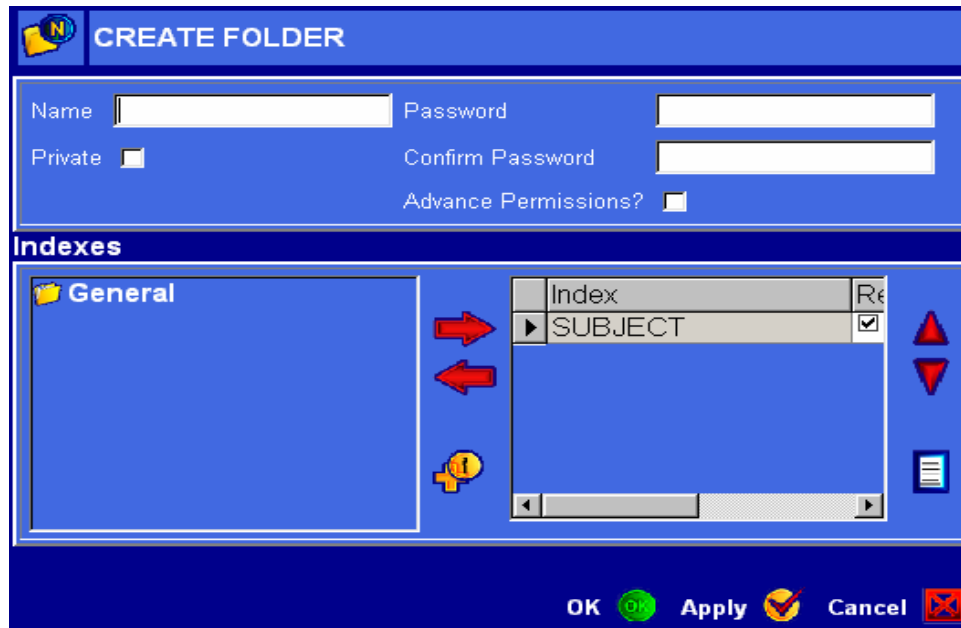
The following steps indicate how to create a folder within a file cabinet:

Click on the file cabinet or folder you wish to create a new folder.

Click on the menu bar “Folder” that is located on the upper portion of the screen.



Select the [  ] “New” option. The system shall then show a window “Create Folder”



In the “Name” field write the name of the new folder. Write and confirm the password to protect the folder from being accessed by unauthorized persons.

It is possible to determine if the folder is private or public when you look under the window “Create Folder”. Click on the “Private” option in order to show the folder in the hierarchical structure only when the session is initiated with the user name and password. If this option is not used, the other users can view the folder.

- If you want to assign permissions immediately after creating the folder check the Advanced Permissions box. For more information on how to assign permissions see the section “Creating a Hierarchical Structure”.





The index that shall be assigned to the folder is defined on the lower part of the window. These indexes help us to identify the type of documentation that is going to be saved in the folder.




On the left hand section, all of the profiles that have been created in the application with their respective categories are shown and the established indexes for each one of them. This facilitates the search of a specific index

On the right hand section the indexes that have been assigned to the folder are shown.

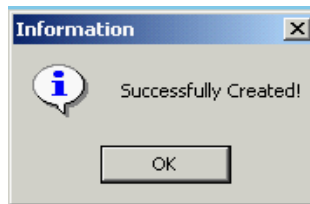
In order to add-in an index to a folder, do the following:

- Select a profile from the left hand section and make a double click on it in order that the categories that are in it are shown.
- Choose the category you wish and make a double click on said category in order that the system shows you the indexes.
- In order to assign an index to the folder, select the index from the left hand section and click on the pointer pointing to the right [→] The “Required” column will indicate if the index is obligatory, this must be filled out at the time of inserting a document.
- In order to eliminate a index you choose the section on the right hand section and click on the pointer [←] left.

- If you wish to create a new index click on the icon  "create index". The system shows a screen in which you shall fill out the name, establish the type (text, yes or no, etc), the mask and others. After filling out the tabs click on "OK". How this window functions is explained in the Indexes Section of the Administration Menu.
- To personalize the operation of your created index, click on "property index"  button right away there appears on the screen the window on the right hand of your screen, where you shall write the formula or rule that determines the function of the index when it is used. The rule is defined through the languages, such as: javascript, and Vbscript.
- On the left column, the arrow pointing up  and the arrow pointing down  are used to move a title of the index up and down on the list, respectively.

After filling out the field tabs and determining the index for the folder, click on the icon  "OK" in order to save the new folder, and click on the option  "Apply" if you wish the system to save the change and not to exit the screen, click on  "Cancel" to close the screen.


The system will show on the screen a message indicating that the folder was created with success.

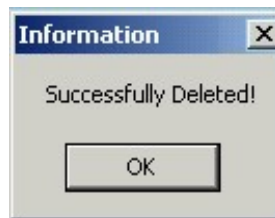


### ***Deleting Folders***

To eliminate a folder from the hierarchical structure:

Select the folder you wish to eliminate

Click on the "Delete" icon  and on the screen there shall appear a message indicating that the folder has been eliminated with success.



### ***Renaming a Folder***

To rename a folder:

Click on the folder you wish to rename.

Click on the "Rename" option from the menu bar "Folder". The name of the folder will then appear in the edition mode.

Write the new name of the folder and click on the "Enter" key. On the screen there shall appear a message indicating that the folder has been renamed with success.

NOTE: When re-naming the folders press "Enter" to confirm the action. Otherwise, when selecting another folder or file cabinet, this shall then elapse into the edition mode.



### ***Copying Properties***

If you wish to copy the properties of a folder to another one, select this option under the menu bar of folders. Right away there appears the window to copy properties, which shall request from you the name of the new folder. Write the new name and click on the "Accept" button.



This option can also be activated using the right hand section of the mouse.

### ***Pasting Properties***


After copying the properties of a folder, you should paste those properties on this folder in the desired location. For this, place the pointer of the mouse on the level in which you wish to paste the properties on the new folder and click on the "Paste Properties" option.

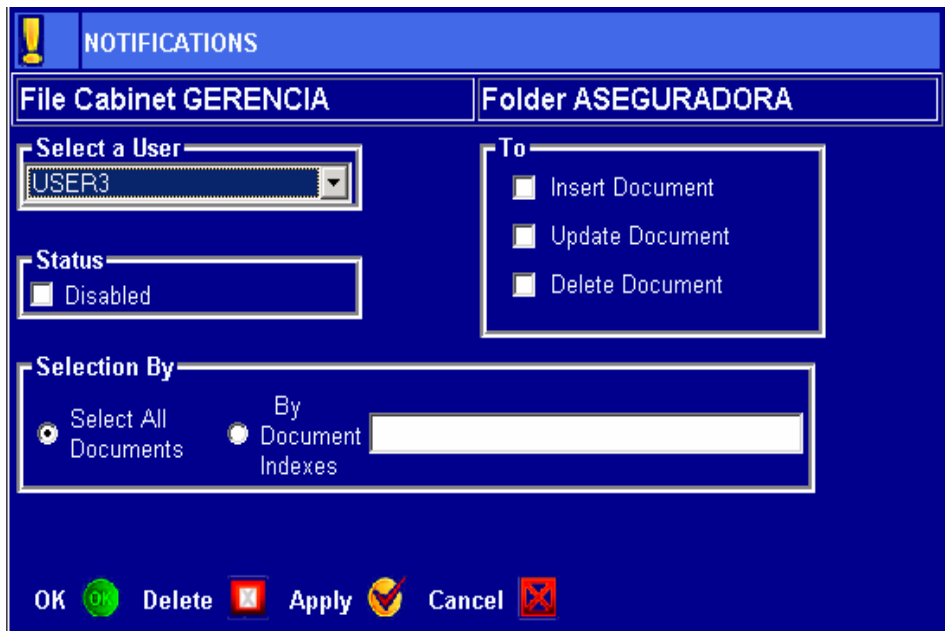
The system shall ask you if you wish to complete the operation, click on the "Yes" button, to continue and "No" to finish the operation.

### ***Notifications***





When the user creates a folder, he can choose to be notified when some actions are done in the folder, actions like: insert, delete or update a document.

To create a Notification:

Click  "Notifications" on the Folder Menu.










The window displays the cabinet and folder name on which you are assigning the notifications.


- Select the user that will receive the notification by selecting his name from the Select User drop down menu.
- Enable the notification by clearing the Disabled check box in the Status section.
- Select the actions that will be notified to the user.
- In the Selection by section, select All Documents if you want the notification to apply to all documents in the folder. By Document Indexes, you can write a word in the field, and the notification will be sent when that word appears on any of the indexes of the document that is being worked on.
- Select  "OK" to save the changes or  "Cancel" to exit the notifications window without saving.
- Select  "Delete" if you want to delete a Notification, select "Apply"  if you want to save a notification and do another one.


### ***View Documents***


Within each folder are saved documents. If you wish to view a document click on "View documents" from the menu bar or right click the mouse. Right away there appears the window where you can view all of the documents that are within this folder, with all of their detailed information; you can even view the document

VIEW DOCUMENTS					
Document Id	Subject	Index 2	Index 3	File Name	Filename E
<input type="checkbox"/>		6284	IMAGEN	FROST.TIF	TIF
<input checked="" type="checkbox"/>		6266	CHEQUE S...	OCR1.TIF	TIF
<input checked="" type="checkbox"/>		6265	ESTADO D...	BOOK1.XLS	XLS
<input type="checkbox"/>		6264	INFORME S...	DOC1.DOC	DOC


View  Save to...  Indexes 

The “View” option [] lets you view a copy of the document; you are not allowed to do modifications on this document. If the document has more than one version, a window showing you the available versions will be displayed, then you can choose which version to use. (See the “Document Versions” section).

Click “Save to” [] to download a copy of the document to your computer.

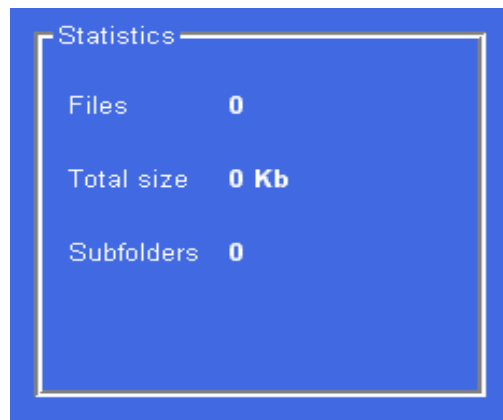
Click “Indexes” [] to view the indexes associated to a document.

### ***Properties of the Folder***


- To see the properties of a folder choose from the Folder menu bar the “properties” option or click on the right side of the selected folder and select the Folder  from the menu bar the “properties” option. Under general properties you can observe the name of the folder, its status, the level and if it is private or not.

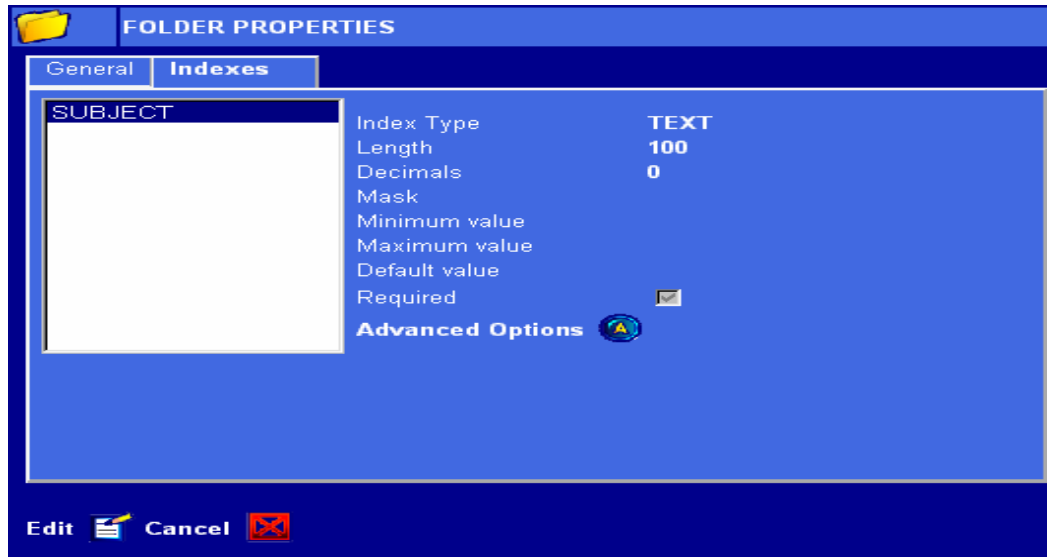



- When you click on the “show statistics” button, on the other side of the window appears the statistical information of said folder, the amount of files saved in it, the total resources in MB (megabytes) and the amount of sub-folders under its heading. To close this statistics window click on the “Hide statistics” button.





If you wish to edit the folder’s properties click on the “Edit” button; right away there will appear on the screen the edit window, which is the same one used to create the folder. To exit this function you only have to click on “Cancel” and the system returns to the properties window.

- Within the properties screen there exists a page denominated Index, which shows you all of the indexes of the selected folder. Each index shows its properties when placing the pointer of the mouse on it. If you click on the “edit” button there shall appear on the screen the window to edit, which is the same one that was used for the creation of the folder. In order to exit this edit only click on the [  ] “Cancel” icon. Right away the system returns to the properties window for folders.



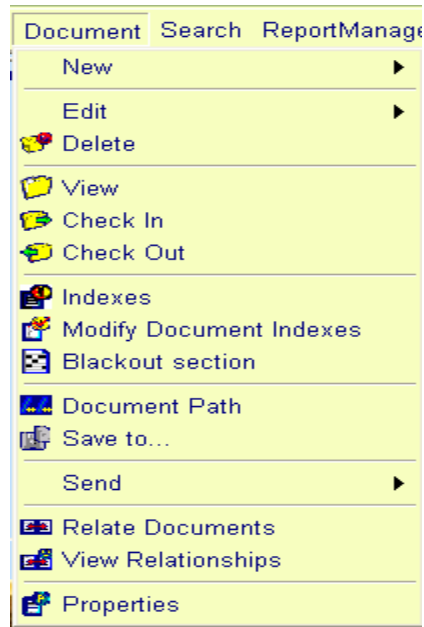
- If you wish to edit the already established rules or formulas in the index section of the folder, click on the “Show advanced options” button that is found under the properties of the folder window within the index page. Right away there appears a window with the associated validation rule for this index, on this screen you may edit the rule, for this click on “Edit”; the system then returns to the create folders window; within this window, click on the “Index Properties” icon  make the changes and press “accept” for the system to close the window and return to the properties of the folder.

If you wish to edit the formulas and only view them, click the  “Show advanced options” to view them and to close the window click on the “hide the advanced options”.

To exit from the properties windows of the folder, click on  “Cancel”.

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## Documents



## Inserting New Documents

Secure-Archives allows you to create new documents through the following options:

“Document”: It allows you to insert any type of file (text files, spreadsheets, images, graphics, videos, sound, etc.) that can be found in one local storage unit (diskette, CD-ROM, magnetic tape, etc) or on the network.

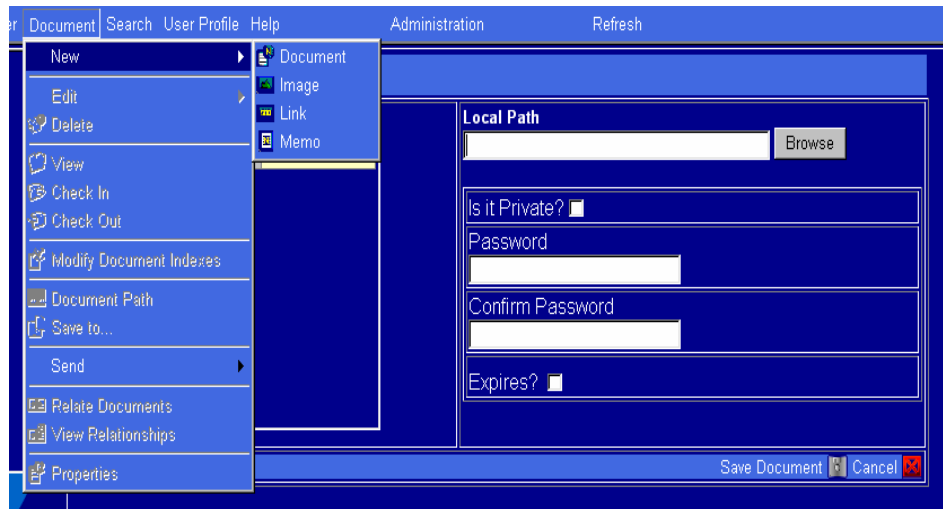
“Scan”: Facilitates the incorporation of images by using a scanner or some other device.

“Links”: It allows you to save addresses from sites in the Internet.

“Notes”: It allows you to create short texts.



To insert a new document, follow the following steps:



Click on the folder you wish to save the document. The files that were saved previously in the selected folder shall appear on the screen.

Select from the menu bar "Document".

Select the "New" option.

Click on one of the options according to the type of document that you are inserting, ("Document", "Scan", "Link", "Notes").

### ***Create by means of the "Document" option***

Click on option "Document".

Click on the "Browse" button to locate the file to be saved.

On the left hand section of the window, assign values to the "Indexes" that shall identify the document.

Index	Value
▶ SUBJECT	

Local Path

Browse

Is it Private?



Password

Confirm Password

Expires?  04/18/2003

Save Document Cancel

**NOTE:** The fields that are in yellow are required fields. The document will not be inserted if any of these fields is blank.

Click on the  "Save Document" option in order to save the document, or click on  "Cancel", in order not to effect the operation.

Select the square "Is it Private?" for the file not to be public. Only the document shall appear listed on the hierarchical structure when the user that created the document initiates the session.

Write a "Password" in the indicated space and select optionally an expiration date for the document.

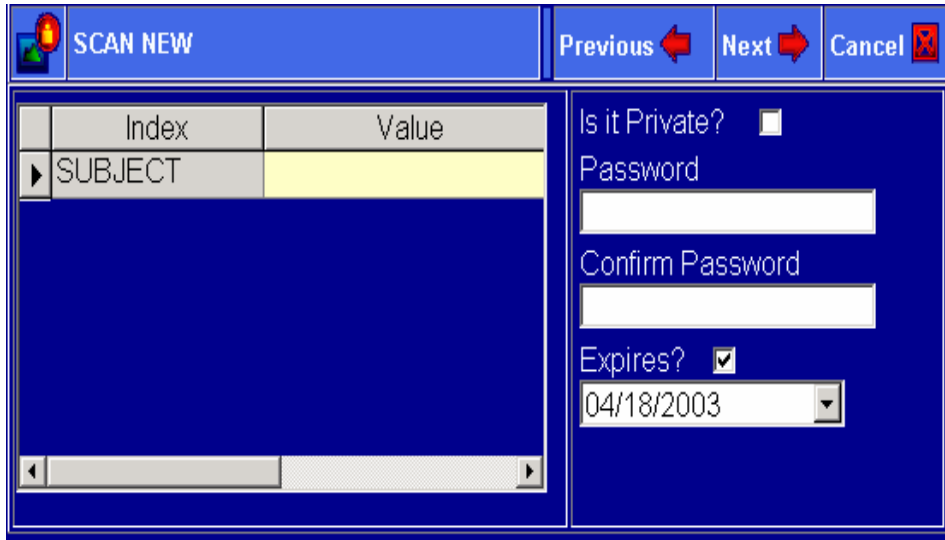
### ***Creation through the Option "Scan"***


On the left hand of the window, you shall assign values to the "Indexes" that shall identify the document.

**NOTE:** The fields that are in yellow are required fields. The document will not be inserted if any of these fields is blank.


- Specify if the new document has a private or public nature. Select the square "Is it Private?" for the file not to be public. The document shall only appear on the listing in the hierarchical structure when the user that created the document commences the session.

Write a "Password" in the indicated space and select optionally an expiration date for the document.

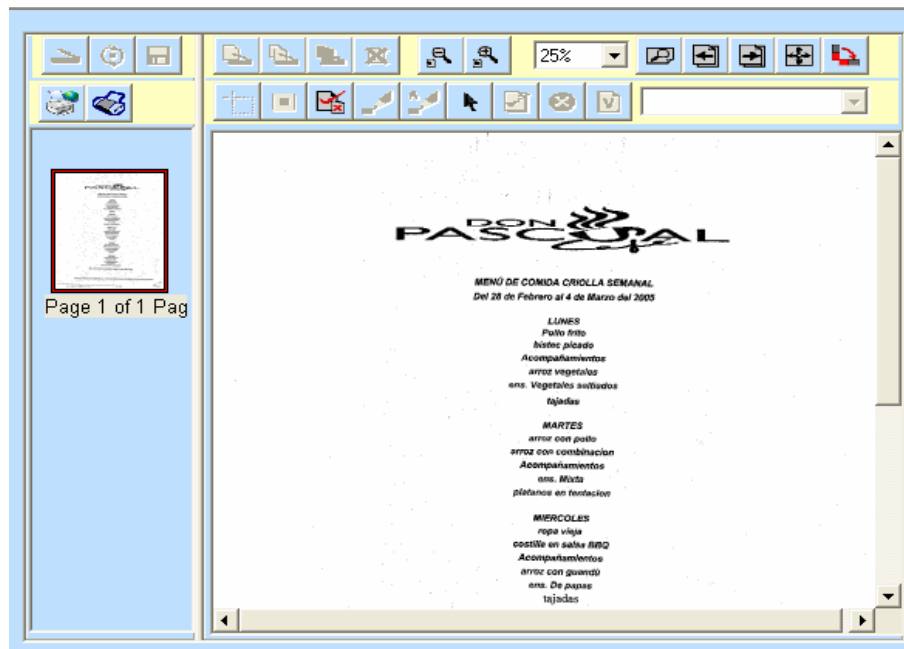


Click on the icon [  ] "Next".

Click on the icon "Select device" [  ] to choose the scan device.

Click on the "Scan" [  ] icon.

The scanning process of the image shall commence and it shall appear under scanner window. From here, it is possible to perform some functions and to manipulate the image (magnify, reduce, include annotations or new pages, etc.).



The following is a listing to serve as a reference of these functions:



“Select Device”: This allows you to select the device to be used for the scan procedure.



“Update”: This allows you to update or refresh the thumbnails section.



“Save”: Saves the scanned document in the Secure-Archives / DocuManager server.



“Magnify section of the image”: This allows you to select the section of the image and to magnify it.



“Scan”: This allows you to scan a new document.



“Insert page”: Insert a new page in the scanned document.



“Add-in page”: Incorporates new pages at the end of the scanned document.



“Zoom”: You zoom in the image.



“Reduce”: You zoom out the image.



“Previous Page”: It shows the previous page.



“Following Page”: It shows the following page.



“Adjust image”: Adjust the image to the size of the window.



“Rotate to the right”: Rotates the image 90° towards the right.



“Adjust Page”: It corrects the alignment of the image if it is not adequate. .



“Hide/Show”: Hides or shows stamps and annotations.



“Highlight”: It permits you to highlight the image considered to be important.



“To Note”: it allows you to make annotations on the image.



“Pointer”: Recuperate the pointer from the mouse.



“Approved stamp”: Insert the approved stamp unto the image.



“Unapproved stamp”: Insert the unapproved stamp unto the image.



“Expired Stamp”: Insert the expired stamp unto the image.

### ***Create through the “link” option***

Write the URL of the desired site in the space bearing the label “Link Path”.

On the left hand section of the window, assign values for the “indexes” that will identify the link.

Index	Value
▶ SUBJECT	

Link Path

Is it Private?

Password

Confirm Password

Expires?

Save Link Cancel

**NOTE:** The fields that are in yellow are required fields. The document will not be inserted if any of these fields is blank.

- Specify if the new link is private or public. Select the box “Is it Private?” for the link **not** to be public. The link shall appear listed on the hierarchical structure when the session has commenced by the user who created it.

Write the “Password” in the indicated space and select optionally an expiration date for the document.

Click on the “Save” option in order to store the link, or click on “Cancel”, not to effect the operation.

### ***Creating through the memo option***

Write the content of the note in the indicated space.

On the left hand section of the window, assign values to the “indexes” which will identify the note.

Index	Value
▶ SUBJECT	

Is it Private?

Password

Confirm Password

Expires?

Save Data Cancel

NOTE: The fields that are in yellow are required fields. The document will not be inserted if any of these fields is blank.

- Specify if the new memo is private or public. Select the box “Is it Private?” in order for the note **not** to be public. The note shall only appear on the hierarchical structure when the session has commenced by the user who created it.

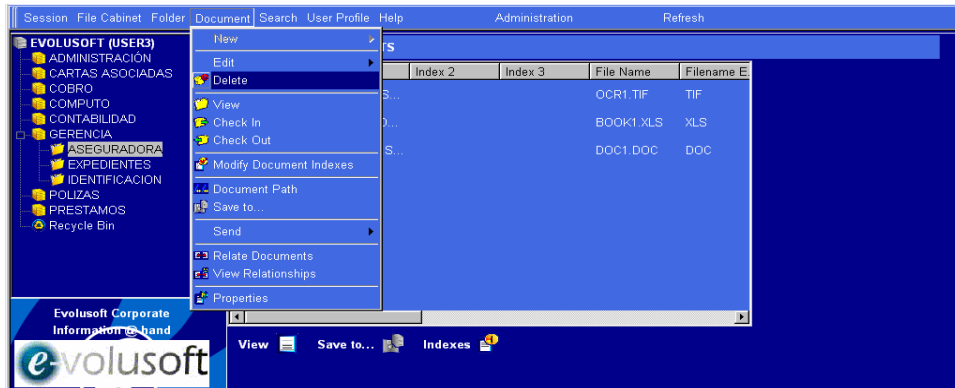
Write the “Password” in the indicated space and select optionally an expiration date for the document.

Click on the “Save” option in order to store, or click on “Cancel”, in order not to effect the operation.

## Elimination of documents

How to erase a document:

- Click on the list of documents. Each element of the list show a square on the left hand thereof which indicates if the document is in use by another user or if has been checked out for editing:
  - Document being used
  - Document free.



- Locate the document to be eliminated and verify if the document is not in use. If the corresponding square for the document is checked, it is not possible to erase it at this time.

Click on the document you wish to erase.

Select from the menu bar, the option “Document”.

Select from the “Erase” option on the menu bar “Document”.

You can also access the menu bar under “Document” click the button on the right hand of the mouse on the document you wish to erase.

## Provisions for erased files

As a preventive measure, any erased documents are stored in the “Recycle bin”.

The following steps should be taken to completely erase the document:



Locate the “Recycle Bin” on the hierarchical structure and click on it. On the right hand section of the window there shall appear a list of elements that have been eliminated previously, but that have not been removed permanently.

Click on the corresponding square for the document you wish to erase.

Click on the “Delete” button.



## Restore the erased files

Refer to the restore the files section – Recycle Bin.

## View documents

In order to view the content of a document on the list:

Locate the document on the list of documents and select it by clicking on it.

Select the “Document” option from the menu bar and then choose the option  “View”. You can also visualize the document clicking on the  on “View” located in the lower part of the list.


## Check out a file

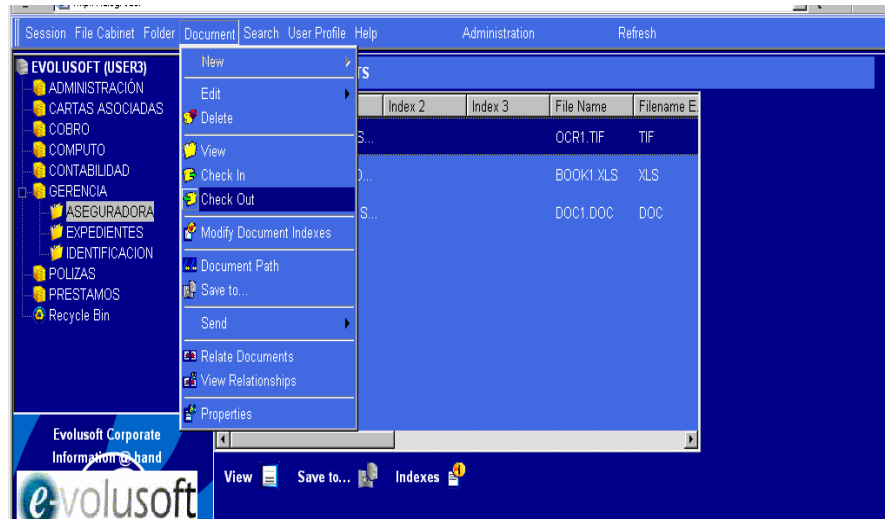
This function allows you to acquire a copy of a document or image from a local device for the user to modify subsequently. The links and memos may be modified directly without any need of a local copy. The checked out document shall be blocked from other users and only the user that has checked it out can access it.

To check out a file:

On the document list, locate the document to be checked out and verify that the corresponding square is not checked []. If the square is checked [, another user maintains control on the document and it cannot be checked out at this time.

Click on the document.

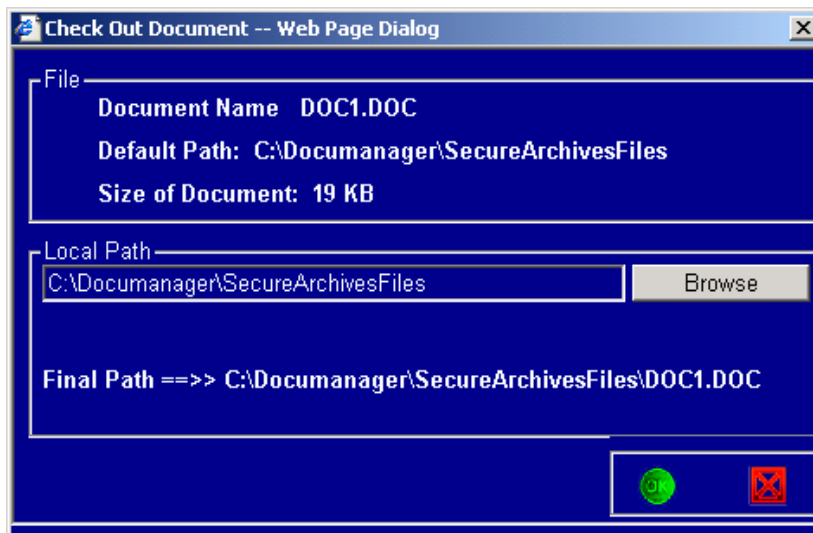
Click on the right hand button of the mouse on the document and select the option “Check out” .



**NOTE:** According to the type of document to be checked out, the procedure shall vary according to the following explanation.

For any kind of documents and images:

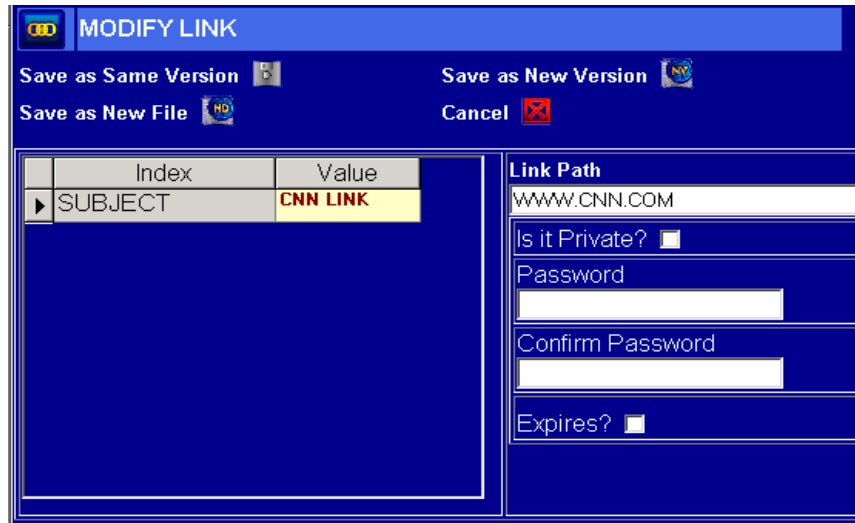
There shall appear a window with general information on the document. Write the path or click on the button "Browse" to select the device and path where you shall save the selected document.



Click on the button  "OK".

A message shall appear confirming the successful operation. If the document is a scanned image, the edition window shall appear of the images so that you can work on the file (refer to Creating through the "Scan" option). In the event it is a document of another kind, you should modify the local copy through the corresponding applications that are in your computer.

For links and memos:  
Proceed with the modifications that you wish to effect.



It is possible to replace the existing version of the link or memo with the modified version [img alt="floppy disk icon"] “Save as the same version”, create a new version [img alt="NV icon"] “Save as new version”, or create a new file [img alt="ND icon"] “Save as a new file”. Click on the corresponding button for the action you choose, or click on the button [img alt="Cancel button with red X icon"] “Cancel” not to effect the operation.

## Check in the file

The option “Check in” only applies to documents and images that have already been checked out for modification through the option “Check out”. These documents and images are listed with a checked square [img alt="checked checkbox icon"] to indicate that it is checked out.

To check in a file or image:

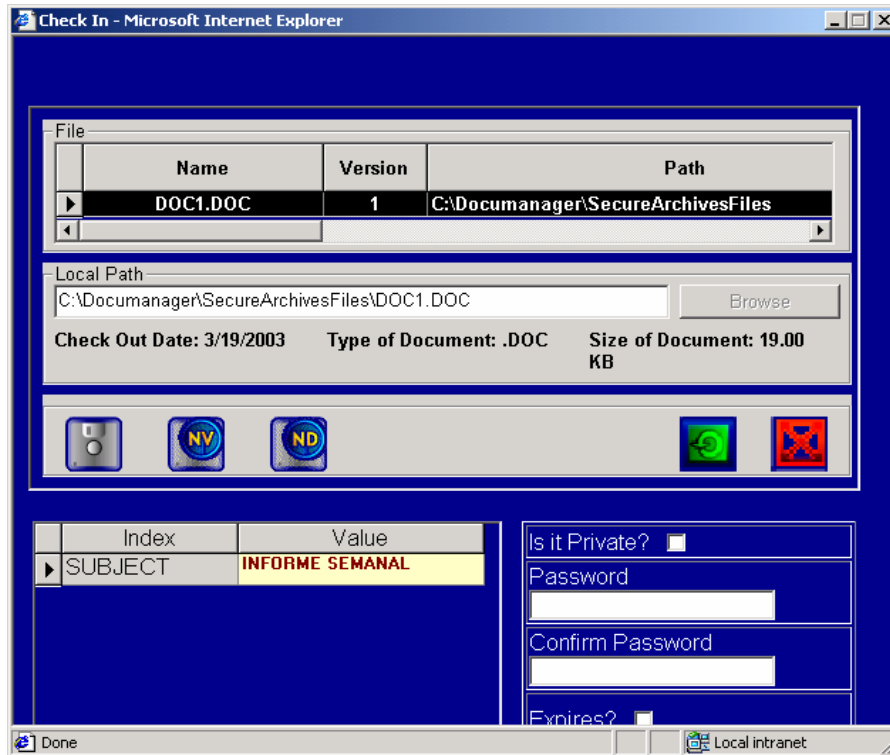
In the list of documents, locate the document to be checked in and verify that the corresponding square is checked [img alt="checked checkbox icon"].

Click on the document to be checked in.

On the right button of the mouse, click on the document to be checked in and select from the menu bar “Document” the option “Check in the file”.

There shall appear a window with general information on the file and its index. It is possible to modify the properties of the document at this point and to replace the existing file [img alt="floppy disk icon"] “Save as the same version”, create a new version [img alt="NV icon"] “Save as new version”, or create a new file [img alt="ND icon"] “Save as a new file”.

Click on the corresponding button for the action you choose, or click on the button [img alt="Cancel button with red X icon"] “Cancel” not to effect the operation.




- After effecting this operation, there will appear a message confirming the success thereof.

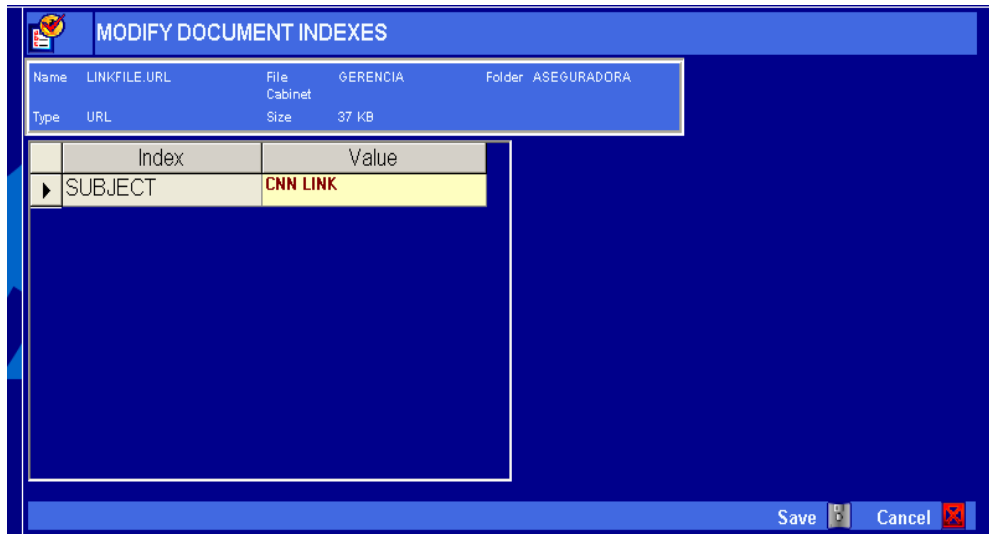
## Modify Document Indexes

This functionality lets the user modify the document indexes.

Locate the document that you want to change the indexes for.

Once the document is located, verify that it is not check out, the check out box should be blank . If the box is check, then someone else has control of the file and it cannot be modified.

Right click the document that you want to modify its indexes, and select  "Modify Document Indexes".

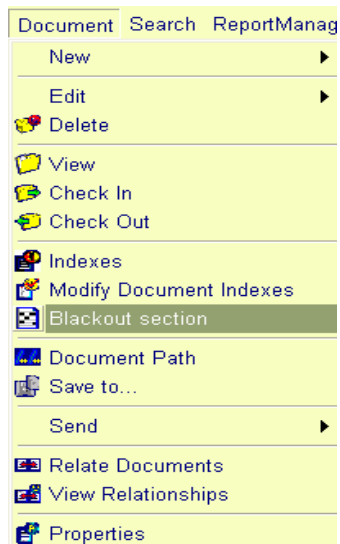


Change the indexes that you want to modify and press  "Save" to accept the changes;  "Cancel" to exit the window without saving the changes.

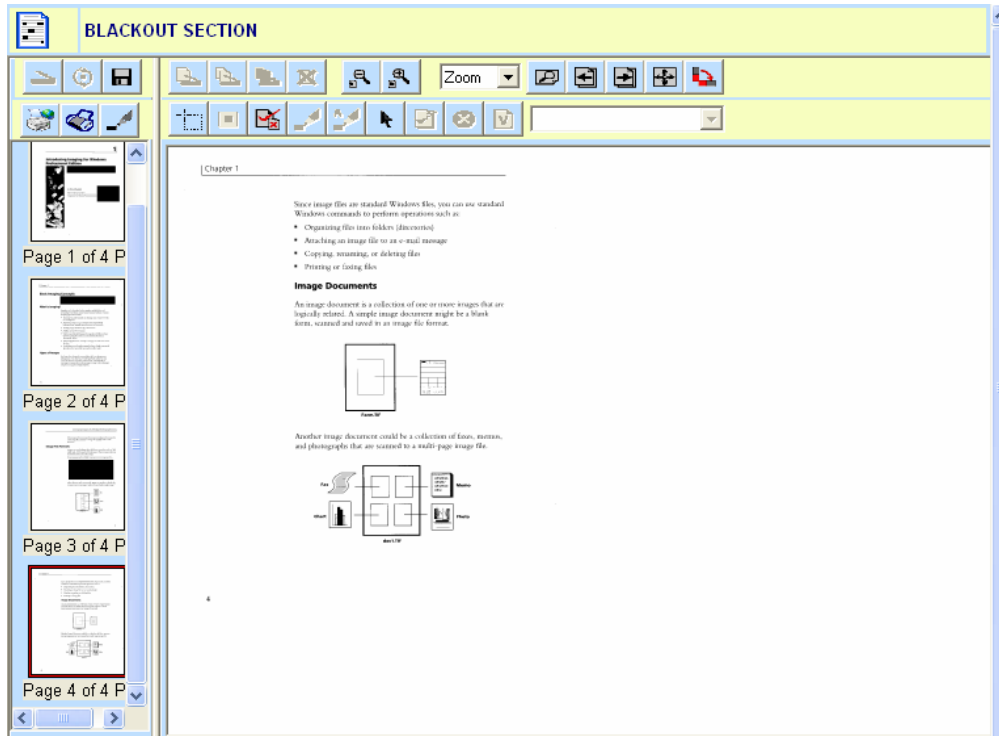
## Blackout Section

This function allows a user should to modify his own TIF documents in such a way that it could conceal valuable information in the document.


Select the document and then right click, in the menu select "Blackout section".



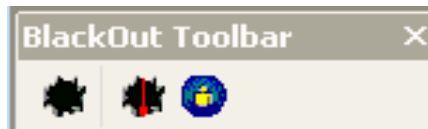
The following screen will appear




### ***Blackout Toolbar***

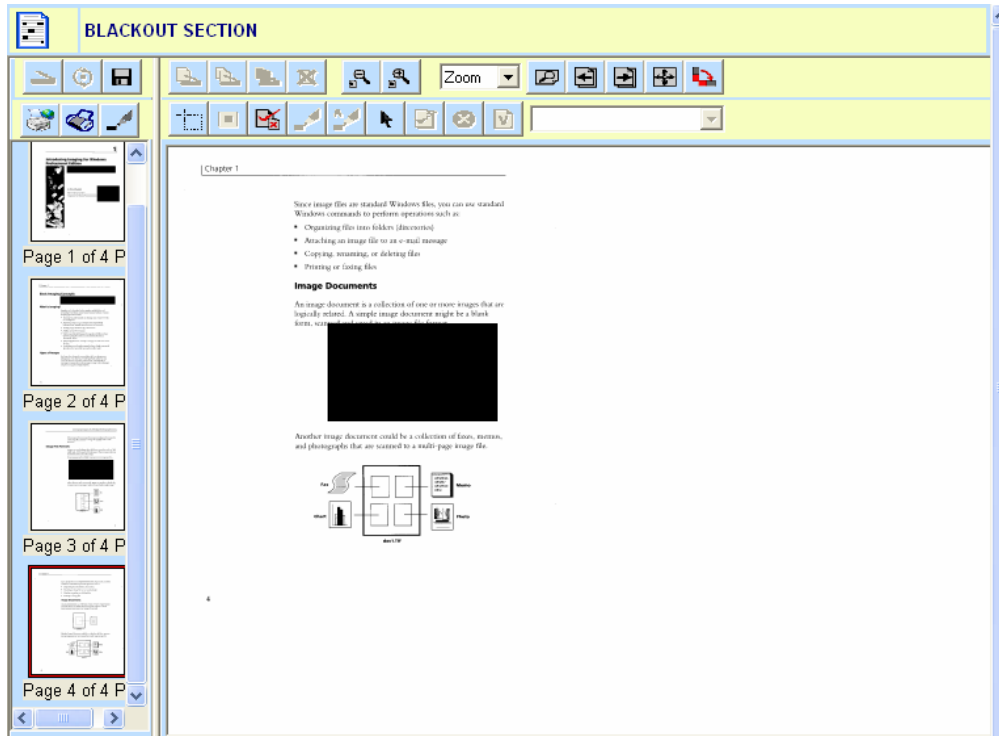
Click on  to select the area to be Blackout

Click on ; the following menu appears:




### **Define BlackOut**



Click on  "Define Blackout"; you will observe in the chosen place a black spot that will not allow to visualize the text that you selected.



## List BlackOut

Click on [  ] "List Blackout" and then the following window appears

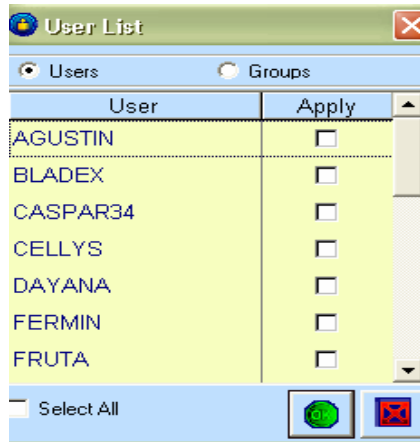
# of	Coordinate/Page	Delete
1	(616,352) - (1164,484) / 1	<input type="checkbox"/>

Select All  

This window shows the list of Blackout that you can have in a document. Remember you can have as many blackout as it is necessary.



## List Users/Groups to Assign BlackOut


Click on [  ] "List Users/Groups to Assign Blackout" and then the following window appears



Select the users to whom the Blackout should be applied.

You can select for Groups or Users.

Click on  to apply or click on  to cancel

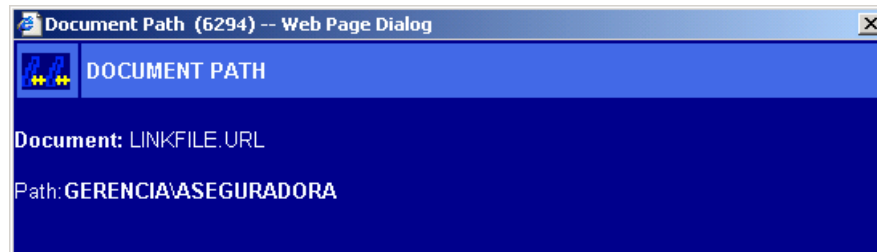
To exit the Blackout section click on .

**Nota:** If you are the owner of a document and can see it without blocked area, this permission will be applied when sending the document by email, meaning that the document will be sent without the area being blocked.

## Document Path

This option shows the user the path in the hierarchical structure where the document is located.


In the document list, right click on the document and select the option “Document Path”, a window will appear showing you the full path where the document is stored.



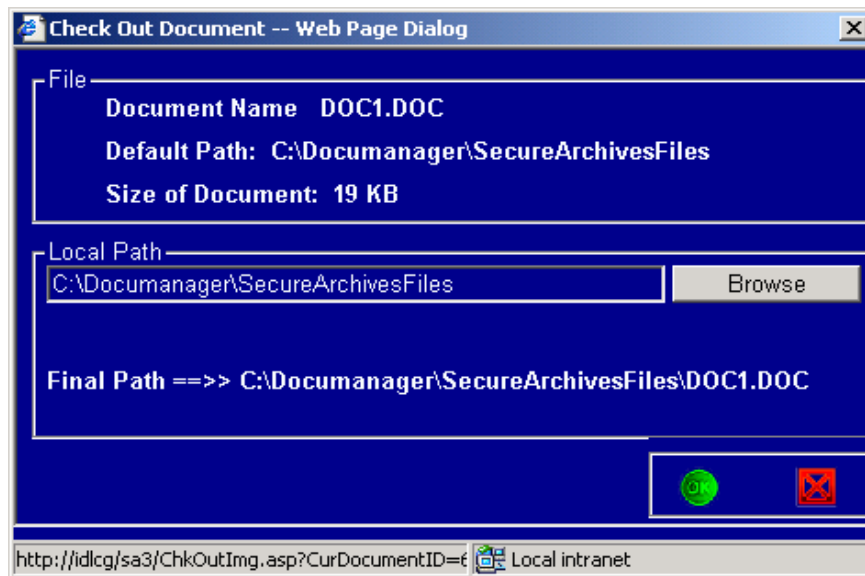
## Save to

If you wish to save copies of the documents on local devices (fixed disk, network units, etc.):


On the list of documents, locate and click on the document to be saved.

Click on the right button of the mouse on the document and select the option  “Save in”.

A window shall appear with general information on the document. Write the local path where you wish to save the document or click on the button "Browse" to choose the path.



Click on the icon [  ] "OK" on the window.

If you wish to cancel the operation, click on the icon [  ] "Cancel".

## Send Documents

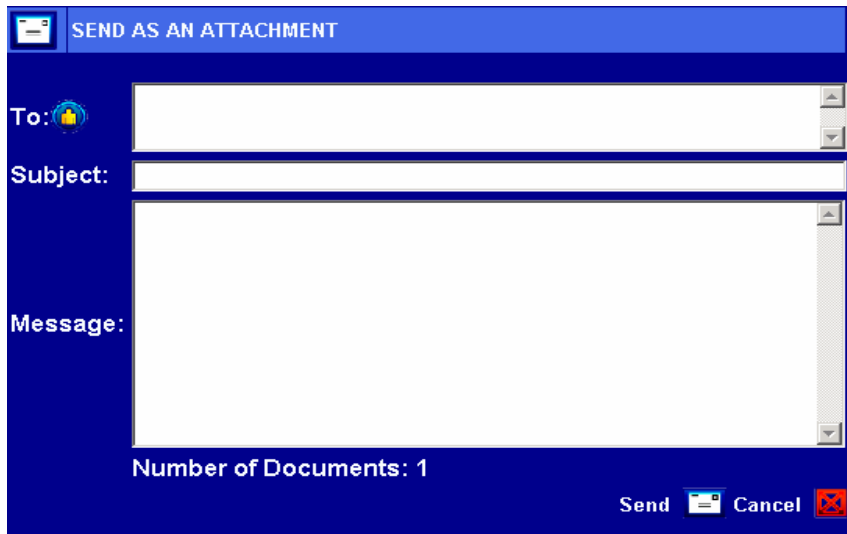



### *E-mail*

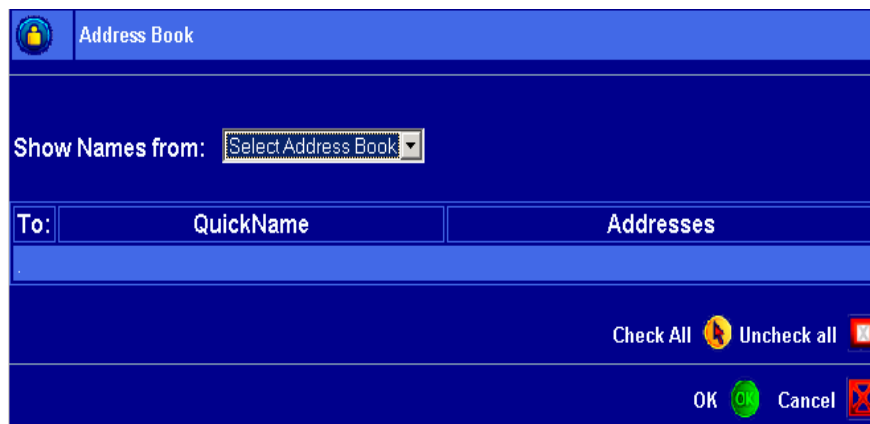
Thru this option the user can send any document to an email address.



In the document list, locate the document and right click on it; select Email from the Send menu.

A window where you can fill the email information will be displayed.





To show the list of your Microsoft Outlook contacts press the “To:” [] button.



Click on the contact that will receive the document. You can select all of your contacts by “Check All” []; to unselect all click the “Uncheck All” [] button.

In the Subject field, write the title for the email to send.

If you wish you can write a message in the message field.

Click on “Send” [] to send the message or “Cancel” [] to close the window without sending the message.

### ***Link***

Using this option a user can send a link to a document stored in the system to any email address.

In Document List, locate the document and right click on it. Select "Link" from the Send menu.

The screen that appears is the same used in the last section.

## Relate documents

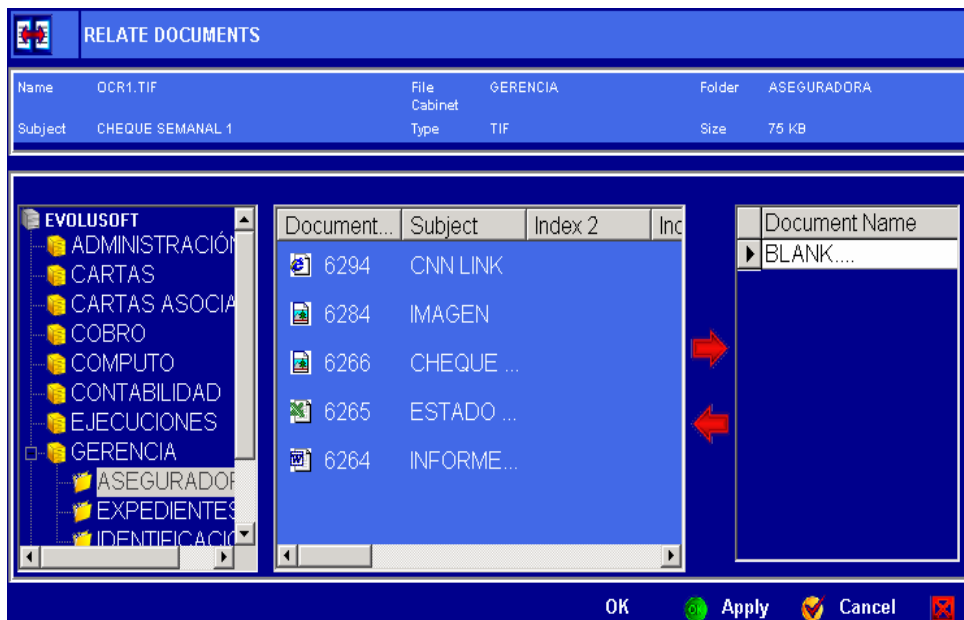
The option "Relate Documents" is used to create relations between documents from different folders, whether they are within the same file cabinet or in different file cabinets. To relate documents:

Locate on the hierarchical structure the file cabinet and folder that contain the document that is to be saved. Click twice on the folder.


The list of documents shall appear. Locate it and click on the document to be related.


Click on the right button of the mouse on the document and select the option "Document".

Select the option "Relate Documents". There shall appear a window showing the hierarchical structure and the list of documents.



Locate on the hierarchical structure the file cabinet and folder that contain the document that is to be saved. Click twice on the folder.

Double Click on the document that is to be related or Click on the icon .

For finish, click on the button  "Apply".

## View Relations

If a document is related to other documents of the hierarchical structure, you can see these relations following these steps:

Locate on the hierarchical structure the file cabinet and folder that contain the document that is to be related. Click twice on the folder.

The list of documents shall appear. Locate and click on the document to be related.

With the button on the right side of the mouse, click on the document and select from menu "Document". Click on the option "View relations". A window shall appear with a list of related documents. From here you may view, check out or check in any related document.



## Properties

The property window of the document contains two sections.

The first one, or under "General", shows the information concerning the name and extension of the file, date created, date of inclusion into the Secure-Archives/ DocuManager server, expiration date, author, status, and if it is private or in use.

The second section, or "indexes", indicates a list of names and values of the indexes of the document.




In order to access any of the two sections:

Locate the hierarchical structure of the file cabinet and folder containing the document you wish to consult. Click twice on the folder.

The list of documents will appear. Locate it and click on the document to be consulted.

Using the right button of the mouse, click on the document and select from the menu bar "Document". Click on the "Properties" option. A window shall appear showing the properties of the selected document. .




The window also contains buttons that allow you to view the related documents  "Related", other versions of the document  "Versions" and to relate new documents  "Relate".



## Recycle bin

All of the file cabinets, folders and documents that are eliminated from the system are saved in the recycle bin. You are able to recuperate or definitely eliminate a document from the system.



In order to restore an element within the recycle bin:


Locate within the hierarchical structure the "Recycle bin" .

Click twice on the recycle bin icon. There will appear a list of the elements contained herein.

Click on the element you wish to restore. It is possible to select all of the elements clicking on the  "Select All" button, in order to unselect all of the elements, click on the  "Unselect all" button.

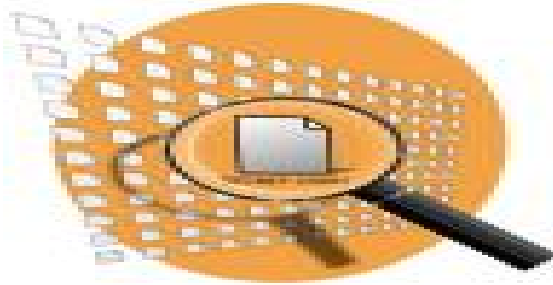


Click on the  "Restore" button for the system to restore the desired element/s or click on  "Cancel" cancel this operation.

Press "Delete"  if you wish to permanently delete the selected elements. If you use this option the deleted element cannot be recovered.

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## File Search



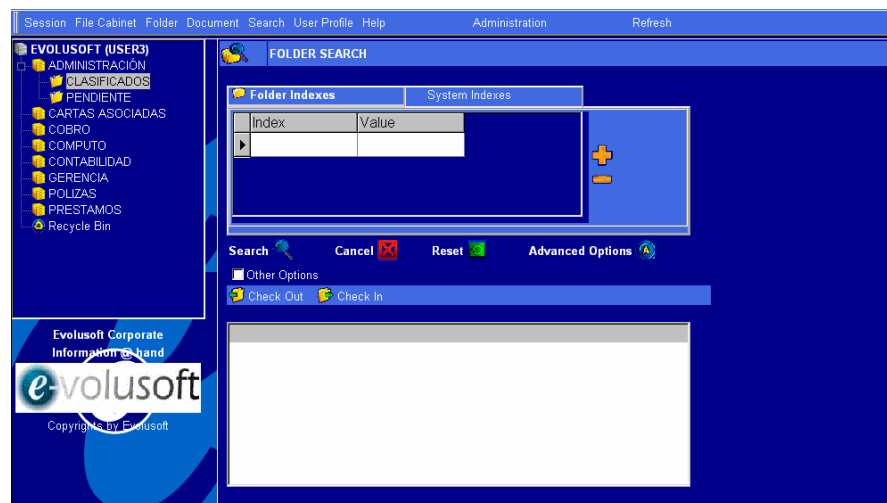
Secure-Archives provides functions to enable you to locate a file.

## Folder Search

The folder search is carried out in the hierarchical structure's folders. This option is recommended in the event that you know the name of the file cabinet and the folder that contains the required document. When you use this function it is possible to have access to other functions in the management of documents.

Locate under the hierarchical structure the file cabinet and folder that contain the document you are looking for. Click on the folder.

- Using the right button of the mouse, click on the folder and select from the menu bar "Search".






- Click on the option "Folder Search". There shall appear a window with two sections: "Folder Indexes" and "System Indexes".

Under the section "Folder Indexes", the user may effect searches using the assigned values to the indexes:


Select from the list the index from which the search shall be carried out. For example, the index "Subject".

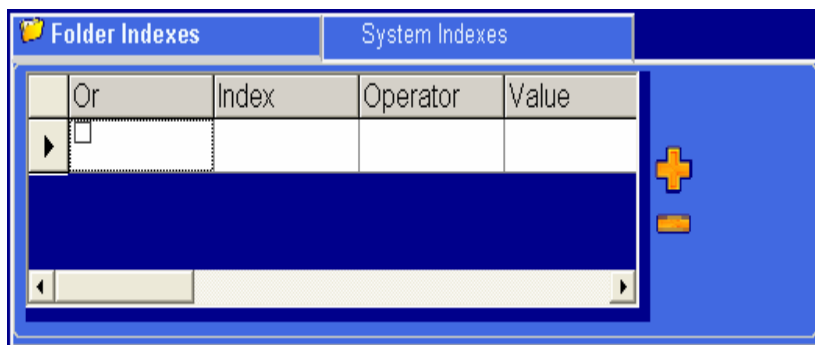
Write on the column "Value" the reference assigned to the file.

It is possible to add on more options therefore expanding the search indexes. Click on the button  "Add-on" and repeat the procedure by selecting an index and writing a reference. The search is performed on all the indexes and options that are added on.

Click on the button  "Search". Those files that comply with the search conditions shall appear on a list in the space provided for. If you wish to cancel the operation, click on the button  "Cancel".

When advanced research options are required that includes logic and mathematical operators then:

Click on the button  "Show Advanced Options". The list of indexes shall appear with two new columns: "Or" and "Operator"

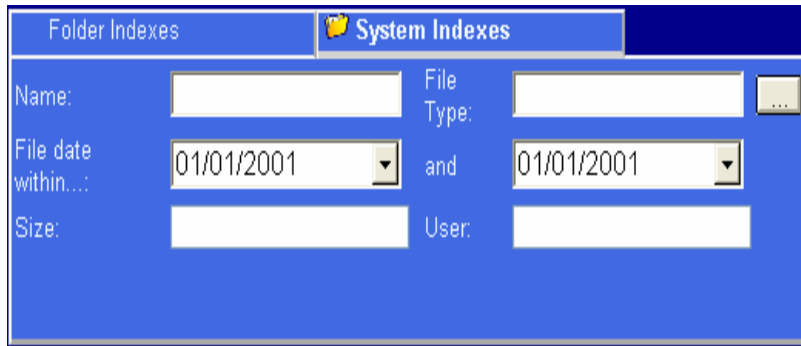


The column, "Or", shows a square that should be checked when you wish to include the logic operator OR (or) in the search. When you leave it in a blank, the default logic operator is AND (and). For example, if a document search is carried out referring to the two indexes denominated "Date" and "Name", the default search shall return all of the elements that have the desired values in both fields. On the other hand, if you check off the square, the search shall return all of the elements that have one or others from the desired values.

The column "Operator" shows a list that allows you to select a mathematical operator in order to compare values and in this manner condition the search. The operators that are included are: = (equal to), > (greater than), < (less than), <> (not equal to), <= (less or equal to), >= (greater or equal to), like (similar to).

- If you wish to add in more search lines to assign other indexes and values, click on the button "Add-in". Other wise, if you wish to eliminate existing lines, click on the button "Remove".

The section "Indexes of the System", carries out searches based on the following default properties of the documents:



“Name of the file”: Name and extension

“Type of file”: Extension of the name of the file.


“Date of the file between... and...” Approximate date of file creation.

“Date of the system between ... and ...” Approximate date of entering the file into the application.


“Size”: Size of the file expressed in bytes.

“User”: Name of the authorized user that entered the file.

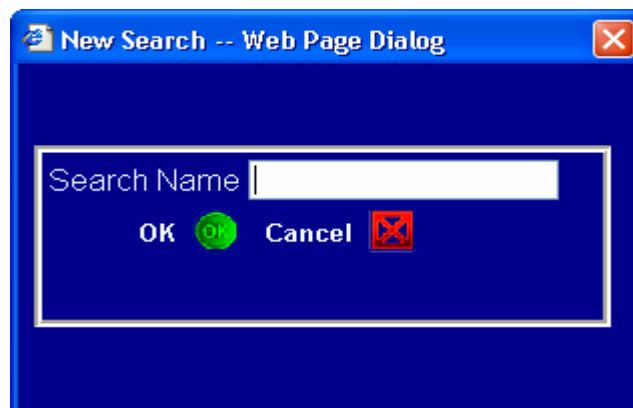
To initiate the creation of a search:

Click on the button  “Refresh” to carry out a new search with new values.


Some searches may be complex, while others are used more frequently. For these cases, the application provides a function that allows you to store searches for its future use.



Check “Other options”, then click the  “Create Search” icon.

There shall appear on the window a request for the name in order to identify the search. Write a name and click on the button “OK”.



If you wish to use previously stored searches:

Check “Other options” and the click on the button  “Previous Search”.

There shall appear on the screen a list of all of the previous stored searches. Select the desired search clicking on the icon . The selected search shall be shown on the window. On the other hand, if you wish to erase the search. Click on this icon .

In the event that it is necessary to perform modifications and update existing searches:



- Click on the button “Update” to save the new changes in the search.

If you wish the search to be carried out bearing in mind that all of the stored folders are within the selected file cabinet:

- Click on the square “Include all of the subfolders in this file cabinet”. Otherwise, the search shall be performed only on the selected folder.

Include all folders in the File Cabinet

Finally, to carry out the search process according to the selected parameters:

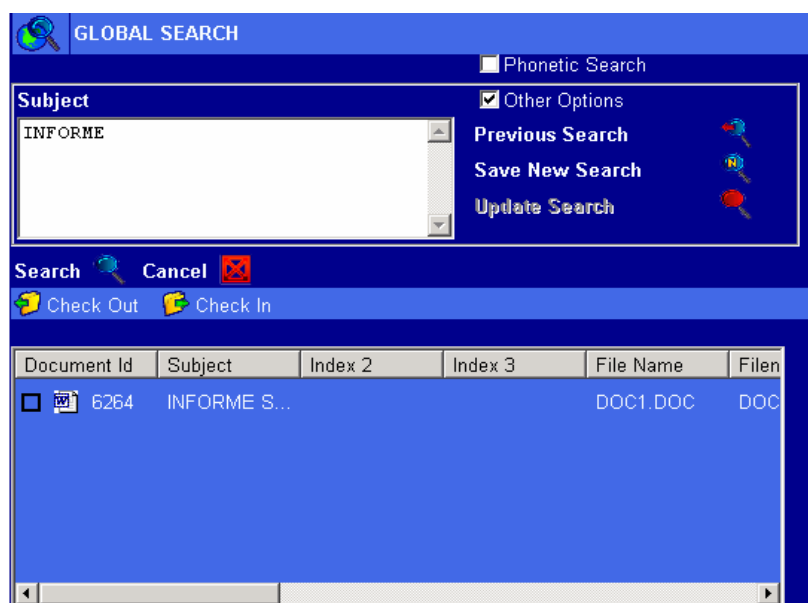
Click on the button  “Search”. Otherwise, click on the button  “Cancel” in order not to perform the search.

## Global Search

The “Global Search” function allows you to perform document searches in the whole hierarchical structure using as a reference fragments of words or phrases.

For example: it is required to search all of the files that contain the value or reference “DOCUMENT”. Write “DO” in the designated space.

Click on the “Search” option from the menu.  
Click on the “Global Search” option.

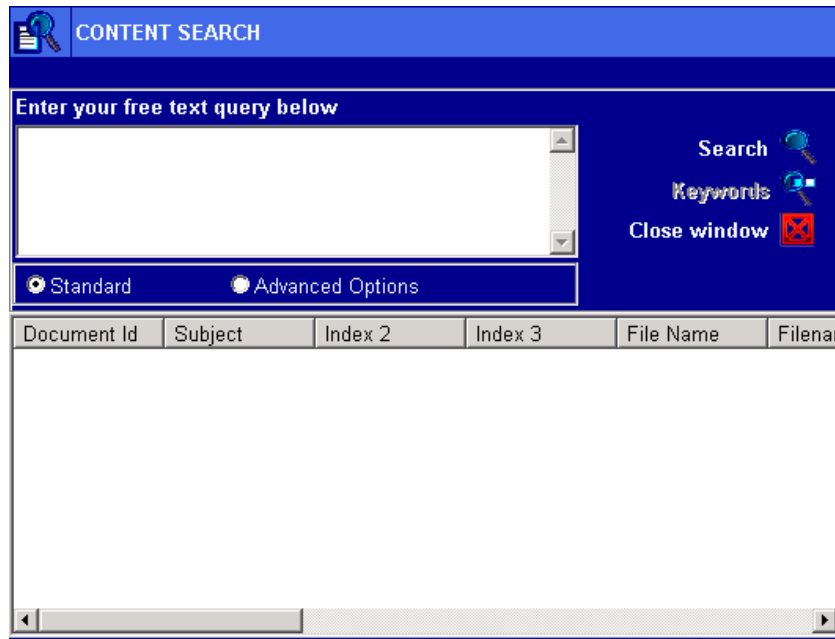


Write under the space "Reference" the value of the index that you wish to have a list on.

Click on the button  "Search".

## Content Search


This option allows the user to search for words in the content of the documents.



Click on the Search menu and select "Content Search", a window like the one shown will be displayed.

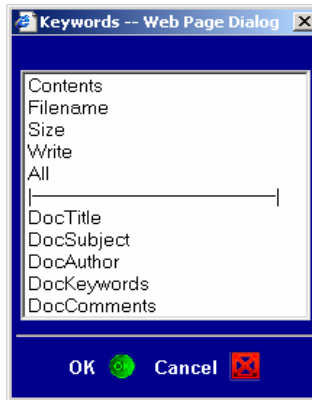
The Content Search can be done in 2 ways: Standard and Advanced Options.

### **Standard**

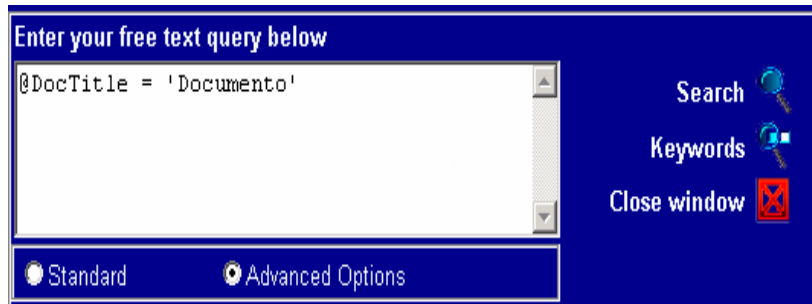
Write the text to look for in the field "Enter your free text query" and press  "Search".

### **Advanced Options**

Select "Advanced Options" and press "Keywords". The system will display a list on which the user can select several characteristics or sections of the document that want to look for.



The system will set the desired option in the field "Enter your free text query" and you write the value that you want to look for. For example:



A list of the documents that match the specified values will be shown.

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## The Menu Bar for the Administration

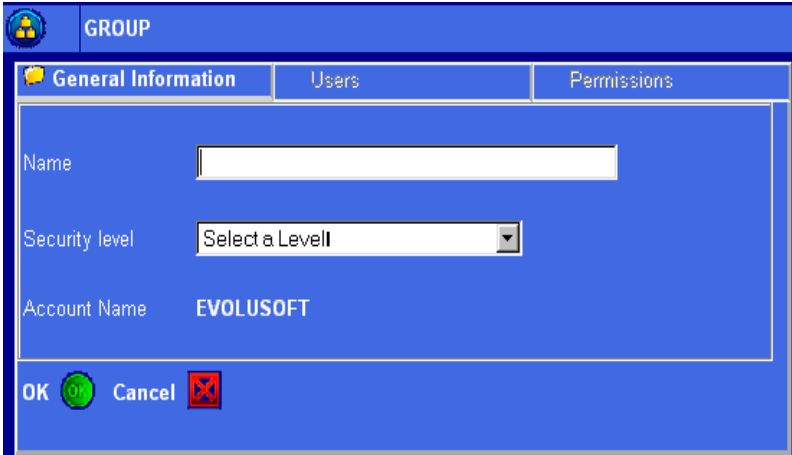
The Administration menu bar in Secure-Archives allows the administrator of the system to do functions concerning security, user creation and user groups, granting privileges and determining general parameters of the application, among other functions.

A horizontal menu bar with a blue background and white text. The items are: Users, Groups, Report, Account, Indexes, Preferences, Help.

## Groups

A group is defined as a unit of users that share the same privileges of use in the application. It is possible to group users according to the type of function performed within the enterprise, according to the organizational divisions of the enterprise, or according to the hierarchy previously established by the administrator of the system.

In order create a group, click on the “Group” option from the menu bar and select the “New” option. Then the “Group” window appears.

A screenshot of a software window titled "GROUP". The window has a blue header bar with a small icon on the left and the title "GROUP". Below the header, there are three tabs: "General Information" (selected), "Users", and "Permissions". The main area contains a form with the following fields: "Name" with an empty text input box; "Security level" with a dropdown menu showing "Select a Level"; and "Account Name" with the text "EVOLUSOFT". At the bottom of the window, there are three buttons: "OK" (green circle), "Cancel" (red X), and a small red X icon.

Write the name of the group in the space provided for this.

- Select the level of access that the users form part of the new group according to the following list:

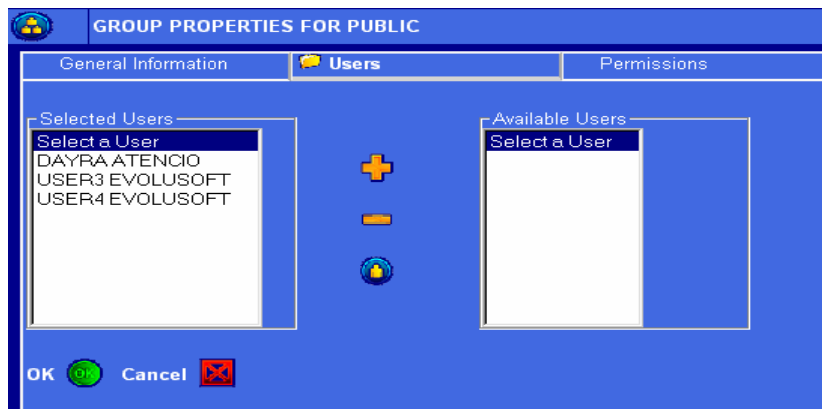
Level of Access	Privileges
Level 1 – System’s Administrator	Audit, Users, Groups, Permissions, File Cabinets, Folders, Documents (creation, modification, elimination, relate to others), Profiles, Categories and Indexes.
Level 2 - System’s Operator	Administration of the features of the contract, File Cabinets, Folders, Documents (creation, modification, elimination, relate to others), Profiles, Categories and Indexes.
Level 3 – Create File Cabinets	File Cabinets, Folders, Documents (creation,

	modification, elimination, relate to others), Profiles, Categories and Indexes and Features of the User (preferences).
Level 4 – Create Folders	Folders, Documents (creation, modification, elimination, relate documents to others), Profiles, Categories and Indexes and Features of the User (preferences).
Level 5 - Administrate Documents	Documents (creation, modification, elimination, relate to others), Profiles, Categories and Indexes and features of the User (preferences).
Level 6 - Consulting Documents	Consulting documents, versions and relations between documents. Features of the User (preferences).

On the “Contract” and “Name of the Account” fields, there shall appear the number of the account and the name of the firm. These fields cannot be modified.

- Click on the “Accept” button. The new group shall be added on to the list of group users.



After creating a group, the sections of “Users” and “Permissions” of the window “Add Group” is now activated. The section “Users” shall allow you to create new users within a chosen group or to move existing users to other groups.



- To create a new user and add him on to the group, click on the “New User” button and refer to the section “Add Users” of this manual.
- To add on existing users to a chosen group, select the name of the user from the list of “Available Users” and click on the “Add Users” button. Otherwise, if you wish to eliminate a user from the group, select the name of the user from the list “Chosen Users” and click on the “Remove” button.
- Once you have made the desired changes, click on the “Accept” button in order that the information is updated in the system.

The section on “Permissions” allows you to grant access privileges to a group at the level of file cabinets or folders in the hierarchical structure. These privileges include from inserting, eliminating, accessing and updating documents all the way up to the creation, elimination, updating and consultation of the hierarchical structure.



- To specify the permissions of a file cabinet or folder, double click on the chosen item on the hierarchical structure and place a check mark on the appropriate check box according to the permissions you wish to grant. To disable all of the permissions for a file cabinet, click on the “Unselect All” check box.
- To update the information on the group, click on the  “Apply” button. In order to cancel the operation, click on the  “Cancel” button.

To delete a group:

- Click on the group you wish to delete.
- Click in the menu bar under “Group” and select the option “Delete”.
- On the screen there shall appear a message requesting a confirmation to execute the operation. Click on the “Yes” button to proceed to eliminate the file cabinet, otherwise, click on the “No” button to cancel the operation.

It is possible to access directly to permissions and group properties:

- Click on the chosen group.
- Select from the option “Groups” under the menu bar and then select the option Permissions. On the screen there shall appear the Group Properties window under the section “Permissions”. To modify permissions, refer to the before mentioned steps in this manual.

In order to edit information concerning a group (properties of the group), at any time after its creation:

- Click on the chosen group.
- Select the option “Groups” in the menu bar and then select the option “Properties”. On the screen there shall appear the Group Properties window under the section “General”. It is possible to edit any of the parameters of the group and then apply the changes.

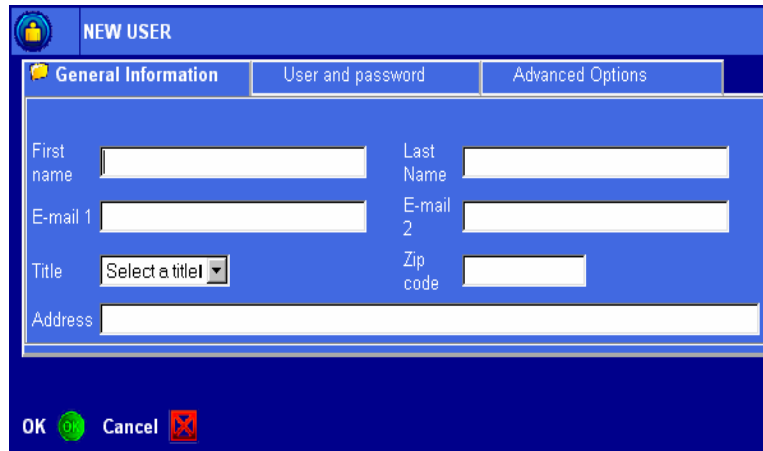
# Users

One of the safety features of Secure-Archives is the implementation of user names and passwords. This feature allows the system's administrator to have greater control over the access that the users have in the system.

## Creating Users

To create a new user:

Click in the menu bar "Users" and choose the option "New". On the screen there shall appear the creating users' window.



The screenshot shows a dialog box titled "NEW USER" with a lock icon. It has three tabs: "General Information" (selected), "User and password", and "Advanced Options". The "General Information" tab contains the following fields: "First name" (text input), "Last Name" (text input), "E-mail 1" (text input), "E-mail 2" (text input), "Title" (dropdown menu with "Select a title" selected), "Zip code" (text input), and "Address" (text input). At the bottom are "OK" and "Cancel" buttons.

Write the general information concerning the user on the spaces provided for this purpose.

Select the section "User and Password".



The screenshot shows the same "NEW USER" dialog box, but with the "User and password" tab selected. The "General Information" tab is now disabled. The "User and password" tab contains the following fields: "Users Name" (text input), "Group" (dropdown menu with "PUBLIC" selected), "Security level" (dropdown menu with "Level 1 - Administrator" selected), "Password" (text input), "Confirm Password" (text input), and a checked checkbox for "Password Never Expires". At the bottom are "OK" and "Cancel" buttons.

Write the name of the user on the spaces provided for this purpose.

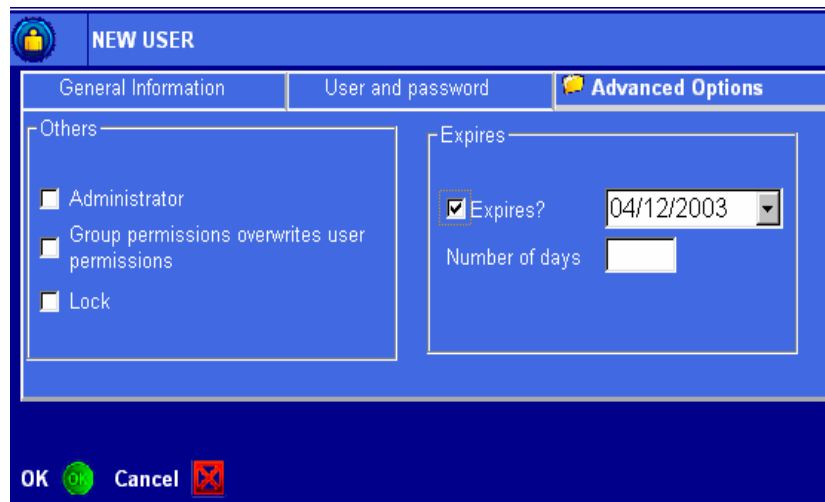
Select from the list, the group in which the new user shall belong to. When choosing the group, the system will automatically assign to the user the level of access that said group has

If you do not wish the new user to have the same level of access that the group has, select the desired level of access from the list.

Write the password and confirmation in the spaces provided for this purpose.

If you do want the password for this user to expire, check the box Password Never Expires, otherwise, the password will expire when the amount of days specified in the General parameters of the Account is reached.

Select the “Advances Options” section.



The screenshot shows a dialog box titled "NEW USER" with three tabs: "General Information", "User and password", and "Advanced Options". The "Advanced Options" tab is selected. It contains two main sections: "Others" and "Expires".

The "Others" section has three checkboxes:

- Administrator
- Group permissions overwrites user permissions
- Lock

The "Expires" section has a checked checkbox for "Expires?", a date dropdown menu showing "04/12/2003", and a text box for "Number of days".



At the bottom of the dialog box are buttons for "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and a small red X icon.

For the new user to have access to the hierarchical structure, check off the “Administrator” square.

If you want to overwrite the users’ permissions when you change the group permissions, check the box, Group permissions overwrites users’ permissions. You can later grant or deny permissions to individual users. If you want to give or deny permissions to all the users in the group that has this option checked, then change the group permissions.

To temporarily block the user’s access to the system, place a check mark in the box “Block”. In order to grant once again access to the user, uncheck the check box.

It is possible to assign an expiration date to the user’s account by selecting a date. It is also possible to assign a number of days in force of the account.

Click on the [  ] “OK” button to proceed with the operation of creating a user. If you wish to cancel the operation, click on the [  ] “Cancel” button.

NOTE: after creating a new user, the screen will show the User Properties window.

## ***Deleting Users***

To delete a user:

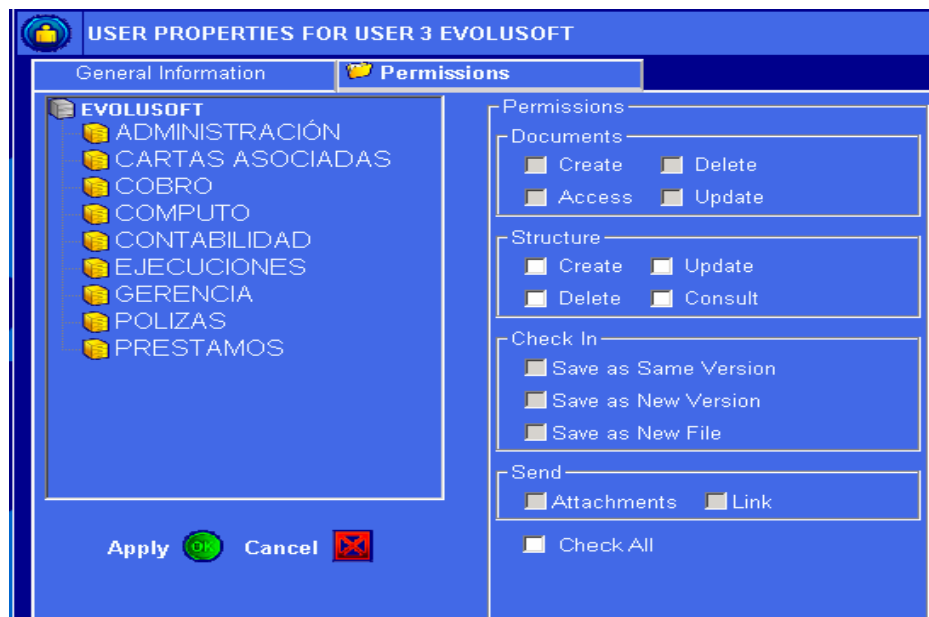
- Click on the user you wish to delete.
- Click on the menu bar on “User” and select the option “Block”.


Again click on the menu bar “User” and this time select the option “Delete”. On the system there shall appear a message requesting confirmation.

- Click on the “Yes” button to confirm the elimination of the user. On the screen there shall appear a message indicating the success of the operation. If you wish to cancel the operation, click on the “No” button.

### ***Granting Permissions to the Users***

Each user has a unit of permissions that allow him to perform operations in file cabinets, folders and documents. To grant permissions to the users:





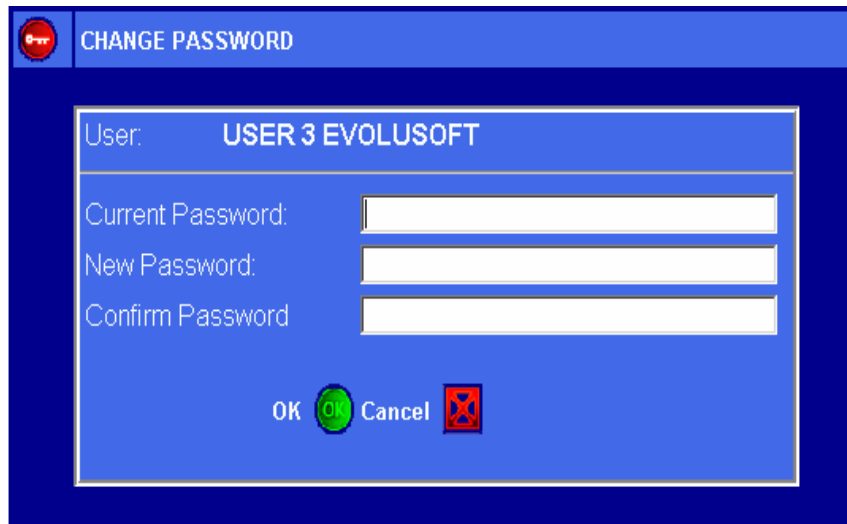
- Select the file cabinet or folder you wish.
- Place a check mark on the corresponding check box for permissions that you wish to assign to the user. Otherwise, if you wish to revoke the permissions to the chosen file cabinets or folders, click on the “Uncheck All” check box.
- Click on the [  ] “Apply” button.

### ***Change of Password***

To change the password of a user:

- Select the user whose password shall be changed.
- Click on the menu bar “User” and select the option “Change Password”. On the screen there shall appear the Change password window.
- Write the present and new password on the spaces provided for this purpose and lastly, confirm the new password.

- Click on the  "OK" button. To cancel the operation without effecting the change of password click on the  "Cancel" button.



### ***Blocking Access to a User***

To block a user from access to the system:

- Select the user you wish to block.
- Click on the menu bar "Users" and select the option "Block".
- On the screen there shall appear a message requesting to confirm the action. Click on the "Yes" button to block the user. To cancel the operation, click on the "No" button.

### ***Properties of the User***



The properties of the user are divided into two sections:

General Information:

Show general information concerning the user (name, last name, address, etc) level of access and group.  
To edit general information concerning the user, follow the following steps:

Click on the "Edit" button.

The "Creating Users" window shall appear.

Proceed with the necessary changes and click on the  "OK" button. If you wish to cancel the operation, click on the  "Cancel" button

Permissions:

This shows you the permissions that have been granted to the user. It is possible to edit the information concerning the permissions directly on this window. To confirm the changes, click on the “Accept” button. For more information, refer to the paragraph concerning permissions in the section creating users.



## Reports

To complement the audit activities the system’s administrator of Secure-Archives offers reports on various activities of the system.


### *Files in Use*


In this section you can see all of the files that are check out by other users. On the menu Reports, select the option Files in Use [📁].



The administrator can release a check out document by selecting the Unlock check box on the file list and clicking Apply [📁].

To release all documents, you can check the Check All check box and click Apply [📁].


To update the list click on the Refresh button [].

If you wish to print the report click on Print [].


Note: When you release the document using this option, all of the changes that the user did to the document are lost since the document is out of the system, the document will be the last version saved in the system before checking it out. We recommend using this option as a last resource to gain access to the document.


### ***Users locked***

In this section you can see all of the users that have an open session, meaning that are using the system or the session was left open by a broken connection.


In the menu Reports, select Users Locked [].

 USERS LOCKED REPORT			
Unlock	User	Application	Date
<input type="checkbox"/>	USER4 EVOLUSOFT	Secure Archives	3/19/2003 11:18:15 AM
<input type="checkbox"/>	USER 3 EVOLUSOFT	Secure Archives	3/19/2003 10:58:08 AM

Check All     Print     Refresh     Apply     Cancel

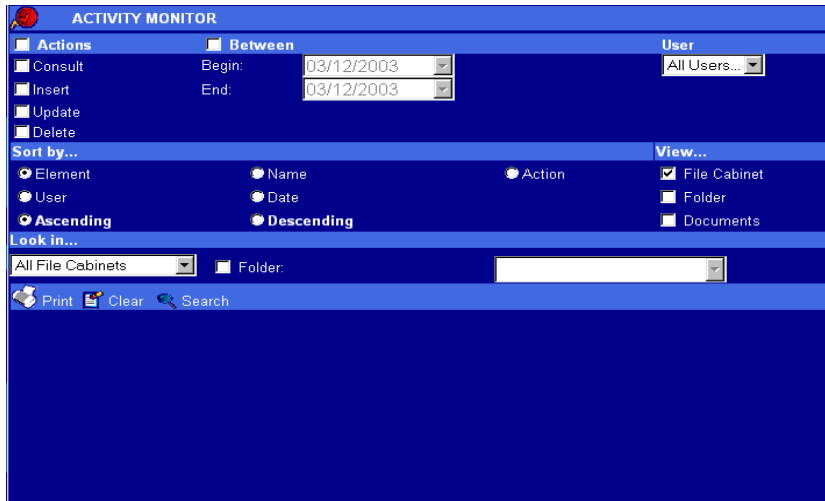
You can release an open session by checking the “Unlock” check that corresponds to the user that he wants to close his session. He can select all of the check box by checking the “Check All” box, after selecting the users to unlock the session, you need to click on “Apply” [].

To update the list of open sessions, click on “Refresh” [].

You can print a report of open session by clicking “Print” [].

### ***Activity Monitor***

The Activities Monitor renders information concerning different actions effected in the file cabinet or specific folder. Enquiries can be performed in general and specifically depending on the search parameters that have been established.



To perform enquiries on the Activities Monitor:


Specify the search parameters:

**Actions:** Establishes a list of the different actions that can be performed in a file cabinet or folder, that is: view a document, insert, update and/or delete.

**Dates:** Determines the range of dates in which a list shall be established of the action to be inquired on.

Specify the element to be searched. A search can be carried out on all of the file cabinets that have been created, on a specific one or on a specific folder within the file cabinet.


Determine the sorting criteria of the results of the search. This option allows you to sort according to element, to action, by name of the user, by workstation or by date. Furthermore, it determines if the results shall be sorted in an ascending or descending manner.

Click on the icon  "Search". The system shall initiate the search of all the actions that comply with the previously described parameters.

To carry out an enquiry, click on the icon  "Clear" and repeat the previous procedure.

### ***Login and Logout Monitor***

The Login and Logout report can be customized by group, user, actions and other options.

In the Report menu select login Logout Monitor .

Specify the parameters for your report. To filter the information displayed you can select to see the information of a user group or an specific user. Also you can sort the result so it is easier to see.

**LOGIN AND LOGOUT MONITOR**

Group:  User:

Actions: Login  Logout  Login failed


Between From:  Up to:

Sort by: User  Actions



Sort: Ascending  Descending


Print  Search

Action	User	Date
LOGOUT	USER2	2003-03-10 09:25:03.230000000
LOGOUT	USER2	2003-03-10 09:41:21.637000000
LOGIN	USER2	2003-03-10 10:11:46.933000000
LOGOUT	USER3	2003-03-10 09:26:22.653000000
LOGIN	USER2	2003-03-10 11:08:47.747000000
LOGOUT	USER2	2003-03-15 11:16:51.273000000
LOGIN	USER2	2003-03-17 11:35:44.827000000
LOGOUT	USER2	2003-03-17 11:36:49.590000000

If you wish to print the report, press the "Print"  button.

To do another report click on Erase  and repeat the process.

If the report is over ten records long, you can move thru the report by clicking the buttons  "Previous" and  "Next".

If the report is too long, you can jump to a desired record number by writing the record number in the Go to field and clicking the button .

### ***Storeroom Report***

The Storage Report renders general information concerning the hierarchical structure.



The upper part of the window gives you details on the total space used by the hierarchical structure in the server. It also gives details on the total number of file cabinets, folders and documents that are included therein.

The lower part of the report makes a listing of all of the file cabinets in the hierarchical structure with information on its size, total number of folders and documents and if they were created as private and with a password. For a better analysis of the information concerning the file cabinets, it is possible to sort the list in the following manner:

Choose the way that you want to sort, ascending or descending, clicking on the corresponding button.

Select from the list the column you will use as a reference for the sorting.

The list shall be sorted automatically according to the selected criteria.

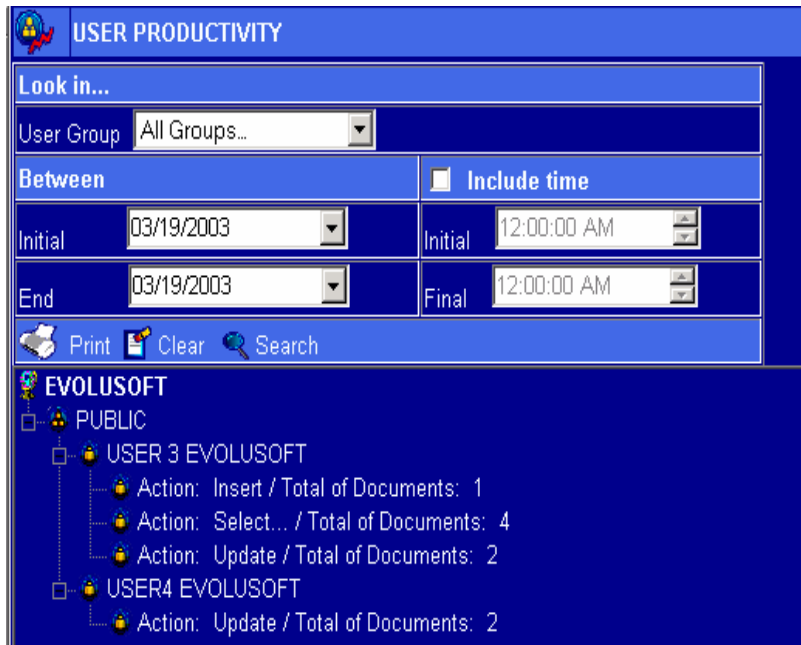
If you wish to view the corresponding hierarchical structure of the content of a file cabinet:

Click on the list on the desired file cabinet.

There shall appear on the screen a window giving details of the elements that form part of the chosen file cabinet. It is possible to open multiple windows at the same time going back to the principal window and by clicking on the other file cabinets on the list.

### ***Productivity of the User***


The Productivity Report of the User shows the actions that each user has performed within the group of chosen users:



Click on the menu bar “Reports” and select the option “Productivity of the user”. There shall appear the window on Productivity of the user.

Select from the list the group to which the users belongs to and whose actions you wish to enquiry.

Determine the range of dates within which the search shall be carried out. You can also define a range of specific time for the search by checking off the square “Include time” and specifying the range of the hours. The defined initial hour is associated with the initial date in which it was established; in the same manner, the final hour shall be associated with the final date.

After having established the search parameters, click on the icon [  ] “Search”. The system shall show you the results as a hierarchical structure of groups and users, jointly with the summary of the activities of the users.

To perform a new search, click on the icon [  ] “Clear” and repeat the previous procedure.

### ***Expiring Documents***

The report on Documents about to expire shows you those documents that shall expire within a specific range of dates. To search for the documents about to expire in the whole hierarchical structure:



Click on the option “Reports” on the menu bar and select the option “Expiring Documents”.




Specify the range of dates within which the search shall take place.

Click on the icon [  ] "Search".

The system shall show you the results of the enquiry, showing the location, name and date of expiration of the documents that are about to expire.

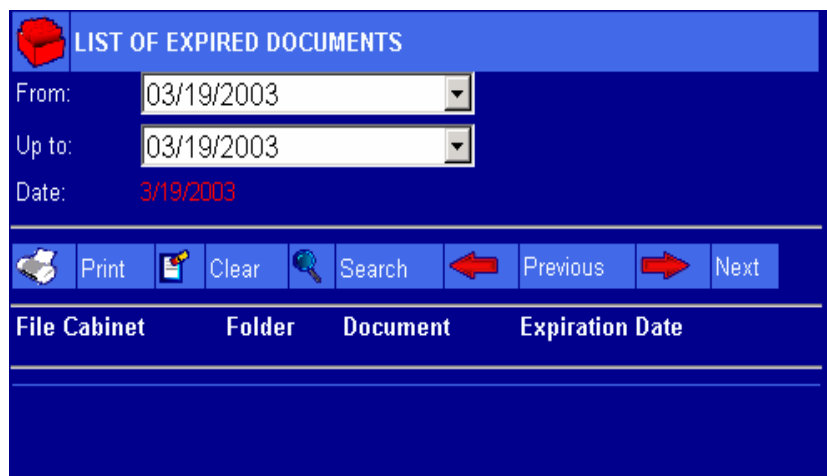
When the present report plus the results appear on the window, click on the icons [  ] "Next" and [  ] "Previous" to view all of the pages of the report.

To effect a new search, click on the icon [  ] "Clear" to erase the previous results and repeat the aforementioned procedures.

### ***Expired Documents***

The expired document report shows those documents whose date of expiration has been complied within a range of specific dates. To search for the expired documents in all of the hierarchical structure:



Click on the option "Reports" on the menu bar and select the option "Expired Documents".



Specify a range of dates within which the search shall take place.

Click on the icon  "Search".

The system shall show the results of the enquiry, showing the location, name and date of expiration of the expired documents.

When it reports more results that cannot be seen on the window, click on the icon  "Next" and  "Previous" to see all of the pages of the report.

To perform a new search, click on the icon  "Clear" to erase the previous results and repeat the foregoing procedure.

## Account

This option provides the administrator general information concerning the contract which established the account.



ACCOUNT INFORMATION	
Company Name:	EVOLUSOFT
Plan name:	FREE TRIAL
Account Status:	Active
<hr/>	
Initial Date:	3/10/2003
Billing Date:	130
Cancel 	

Within the report there appears the name of the account, type of plan, status of the account, date in which the contract initiated and invoicing date.

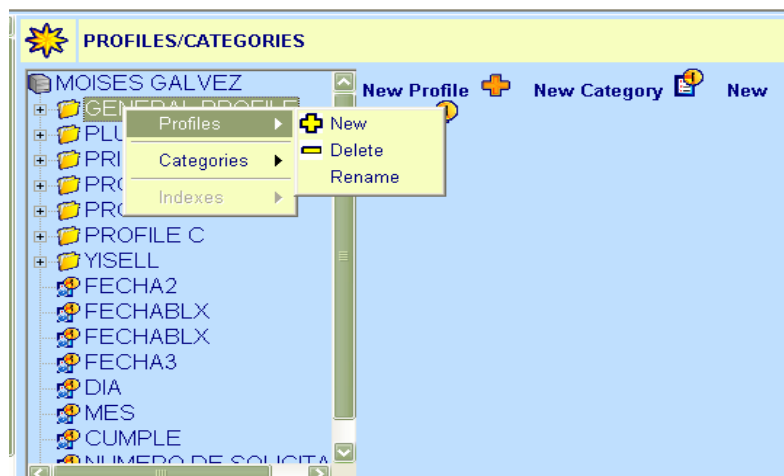
## Indexes


Secure-Archives allows you to create index profiles and categories in order to better classify them, and in this manner attain to expedite the creation procedures within the hierarchical structure.



### ***Creation of profiles***

To create a profile:






- Select the option "Indexes" from the menu bar.
- The selection "Profiles" from the window "Profiles / Categories" shall appear on the screen.
- Write in the allocated space the name of the new profile.
- Click on the button [  ] "Add" from the profiles box and the new profile shall be added on to the list of profiles.



## Deleting Profiles

A profile may be eliminated when you do not have associated categories to it. For this, it is necessary to eliminate the associated categories before proceeding to eliminate the profile.




- On the profile list, click on profile to be eliminated.
- Click on the button  "Delete" from the profile box. There shall appear a message requesting you to confirm the operation.
- Click on the button  "OK" in order to proceed with the elimination of the profile. If you wish to cancel the operation, click on the  "Cancel" button.

## Creating Categories

To create a category:




- Click on the profile list on the profile you wish to associate the new category.
- Write on the designated space the name of the new category.
- Click on the button  "New" from the category box and the new category shall be added to the list of profiles.



## Deleting Categories

A category may be eliminated when you do not have any indexes associated to it. For this, it is necessary to eliminate the associated indexes before proceeding to eliminate the category.



In the list of categories, click the category you wish to eliminate.

- Click on the button  "Delete" from the categories box. There shall appear a message requesting you to confirm the operation.

- To proceed with the elimination, click on the button [  ] “OK”; to cancel the operation, click on the button [  ] “Cancel”.


### ***Rename Categories***

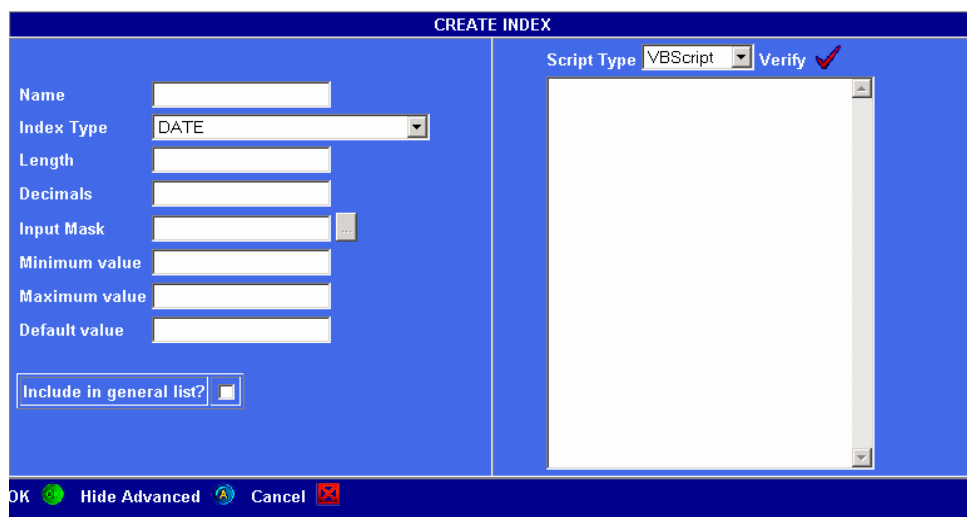
Right click on the Profile that you want to rename, a menu will spread out.



- Click on "Rename" of the menu
- The name of the Profile will appear in a box letting you edit it.
- Press enter when you are done.

### ***Creating Indexes***

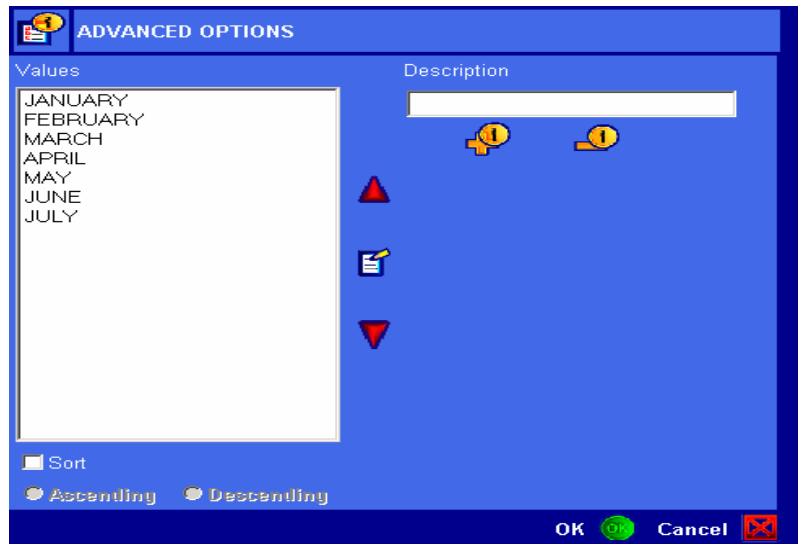
- Select the “Categories” section in the window “Profiles / Categories”.
- Click on the list of categories on the category with which you shall associate the new index.
- Click on the button [  ] “New”. The window “Create Index” shall appear on the screen.





Write on the designated spaces the corresponding information of the new index:


Name: Name of the new index to be created.


- Index Type: Determines if the index will store text, numeric, date, time, yes/no values or if the values will be selected from a list. If you choose the list data type, a window will be displayed; in this window you can write the values that you want your list to display.





Write the value that you want to appear in the list, then press ENTER or click on “Add to list” .

If you wish to remove a value from the list, click  “Remove from the list”. Note that if you remove the value from the list, not from the indexes that have this value stored.

The option  “Move up” lets you move the item up one position.

The option  “Move down” lets you move the item down one position.

If you have the values for the list in a file, you can select the option  “Paste values to the list”, it will appear a window where you can paste the values. To assign values to the list select the option  “Load Data to the List”.

If you wish to sort the values, select the option “Sort” and select if you want to sort the values in “Ascending” or “Descending” order.


When you are done writing the values that you want in the list, click on “OK” .




If you don’t want to do the changes click on “Cancel” .

Other values that you can fill when creating indexes are:



- o Length: Length of the characters that shall have an index type “Text”.
- Decimals: Number of decimals that shall have an index type “Number with decimals”.
- o Input Mask: Default format for the indexes.
- o Minimum: Minimum value in a numeric type index.
- o Maximum: Maximum value in a numeric type index.
- o Default Value: Default value for the index.
- o Is it to be included in the general list ?: This indicates if you wish the index to appear in the general list of indexes for the system.

It is possible to establish personalized rules to manage the index using segments from the Jscript, JavaScript or VBScript Code:


- Click on the button  “Show advanced options”. The “Advanced Options” section shall appear on the window “Create Index”.

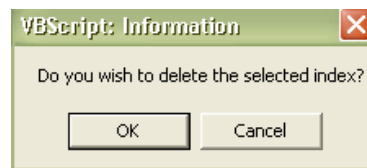
- Select from the list the language you shall use to write the code segment.
- Write the code segment in the designated space.
- Click on the button  “Verify” to review the syntaxes of the code segment according to the selected language.
- Click on the button  “Hide Advanced options” to close the section on advanced options.
- Click on the button  “Accept”. The new index shall be incorporated into the index list.

### ***Deleting Indexes***

For an index to be erased, it cannot be associated to a category, to effect this, go to the index you wish to erase from the list of “Selected Indexes” to the “Available Indexes” clicking on this icon  and then click on the button  “Apply”.

Place a check mark on the desired index with the pointer of the mouse.

Click on this icon  “Delete” that is located on the lower part of the box “Available Indexes” and confirm the operation.



Note: Only indexes that are not associated to a category and / or folder can be erased.

### ***Properties of the Index***

The window “Properties of an Index” shows information concerning the index under the terms of the described parameters under section “Creating an Index”. To view its properties, select the index from the list of indexes and click on the button “Properties”.



The following window appears:

Then, it is possible to update the properties.

### ***Associating Profiles and Categories.***

Select from the profile list which one you shall associate with a category.

Select the categories you wish to associate the profile with and click on the icon . If you wish to select all of the categories at the same time, click on this icon . The selected categories shall appear on the list of "Selected Categories".

If you wish to disassociate a category from the profile, select the category on the list of "Selected Categories" and click on this icon .

Once you have effected the desired associations, click on the icon "OK" to save the changes. Otherwise, click on the button "Cancel".

### ***Associating Categories and Indexes.***

Select from the category list which one you will associate with the index.

Select the indexes you wish to associate with the category and click on this icon . If you wish to select all of the categories at the same time, click on this icon . The selected categories shall appear on the list of "Selected Indexes".

If you wish to disassociate an index from the profile, select the index on the list of "Selected Indexes" and click on this icon .

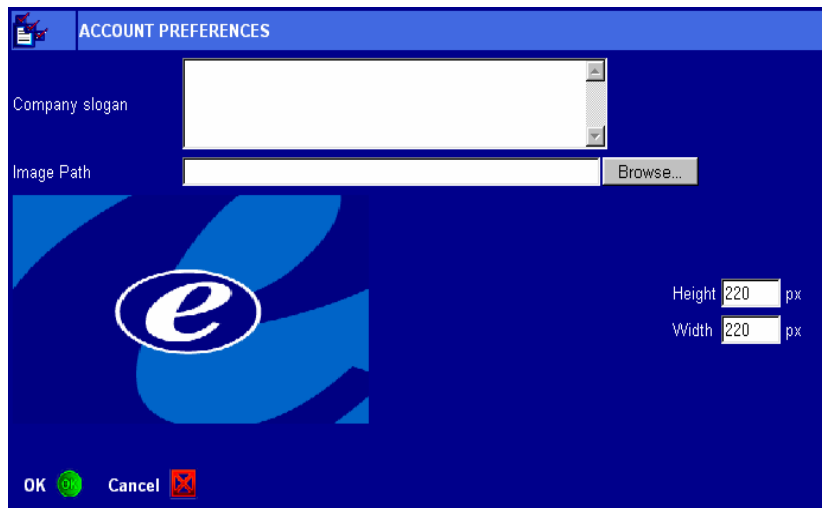
Once you have effected the desired associations, click on the icon "OK" to save the changes. Otherwise, click on the button "Cancel".

## Preferences



In this section of the menu bar, the system's administrator may establish general parameters to modify the environment of the application.

### *Environment*

This allows you to define the logotype that shall be viewed in the application.



To define a logo type:

- Write the route of the image file to be used as the logotype. If the route is unknown, click on the button “Examine” and locate the file.
- Write a slogan or message on the designated space.
- Click on the button [  ] “OK”. The users shall view the logotype and slogan in the application when initiating a new session. To cancel the operation, click on the button [  ] “Cancel”.

Note: On the left hand part of the screen, there appears a reference of the approximate size the image should have when used as the logo.

### *General Parameters of the Account*

Certain security options of the documents are defined here:

**Modification of Images:** This defines if the users are allowed to modify the scanned files.

**Delete Documents:** This defines if the users are allowed to eliminate documents.



**User-Defined rules:** This defines if the users are allowed to create their own rules for the indexes with programming languages described under the section “Creating Indexes”.

**Minimum Password Size:** Defines the minimum numbers of characters that the password must have.

**Maximum password age (days):** Determines the number of days that the password is valid, after this amount of days the users must have to change the password. This option can be disabled for specific users in the user’s properties page.

**Total Shown Document:** The user is permitted to define if he wishes to view the all of the documents of a folder or just a predefined number so the list view can load faster.

This section establishes the predefined permissions that are inherited by each of the objects in the structure to be created. These permissions are set until you change them, if you wish to.

After checking the desired options click on the button  “OK” to confirm the operation. Otherwise click on the button  “Cancel”.