



DOCUMENT ARCHIVER MANUAL

Consortium Services, LLC

Cameron Thomas
cthomas@consortiumservicesllc.com

Contents

Introduction	1
Starting.....	2
Setting up a Source	2
Managing Watch Folders	3
Managing Routes	5
Manage Schedules	7
Document Management.....	8
Macro Document Management	8
Micro Document Management	10
Selecting Items.....	10
Changing file Views	11
Making New Folders	11
Uploading and Downloading Individual Documents	11
Renaming Files	12
Copy and Pasting Files.....	12
Delete Files.....	13
Refreshing Screen	13
Search Files	13
Emailing Files.....	13
Linking Documents.....	14
Settings.....	14

Introduction

Document Archiver is a system that was built and maintained by Consortium Services, LLC based out of Vancouver, Washington. It was designed with the intent to minimize if not eliminate the need to keep physical archives of documents that are both costly to store and difficult to reference. By using this program it is not only possible to convert archives of records from physical paper documents to easily organized and safely stored digital files, but it also allows the user to share files that are beyond the size limits of email.

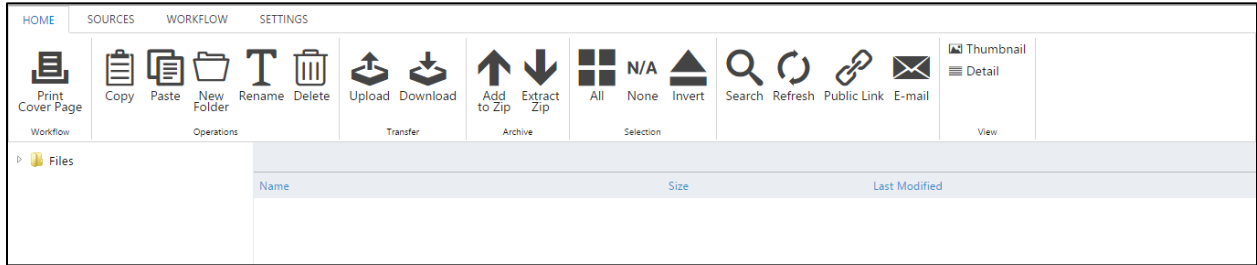
This manual will cover the basics of the Document Archiver back end. Ideally the data entry level users will not see these options and they should be configured by the system administrator, though the

Document Management section is useful for all levels of users to read while familiarizing themselves with this software.

Starting

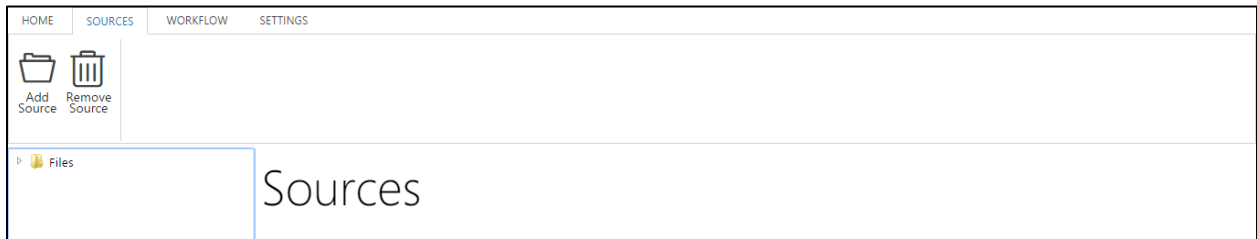
To begin using Document Archiver a system administrator will have to install Document Archiver on the server. The locations that will be referenced in this manual are on the server, not a local console.

After installation, the Document Archiver dashboard will look like this.

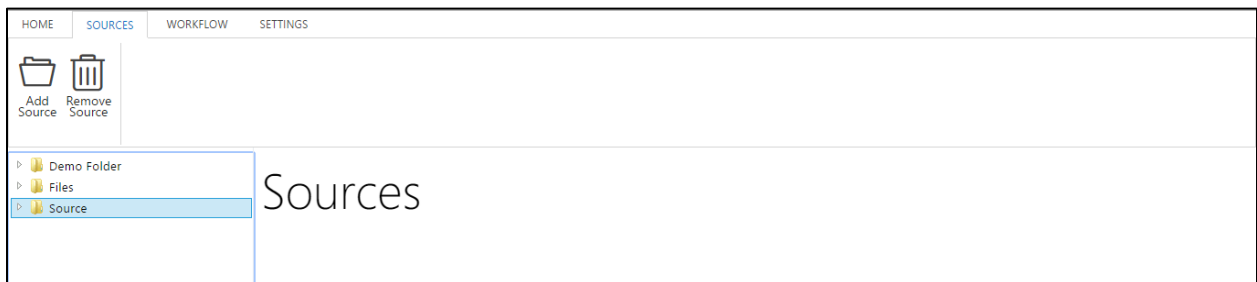


Setting up a Source

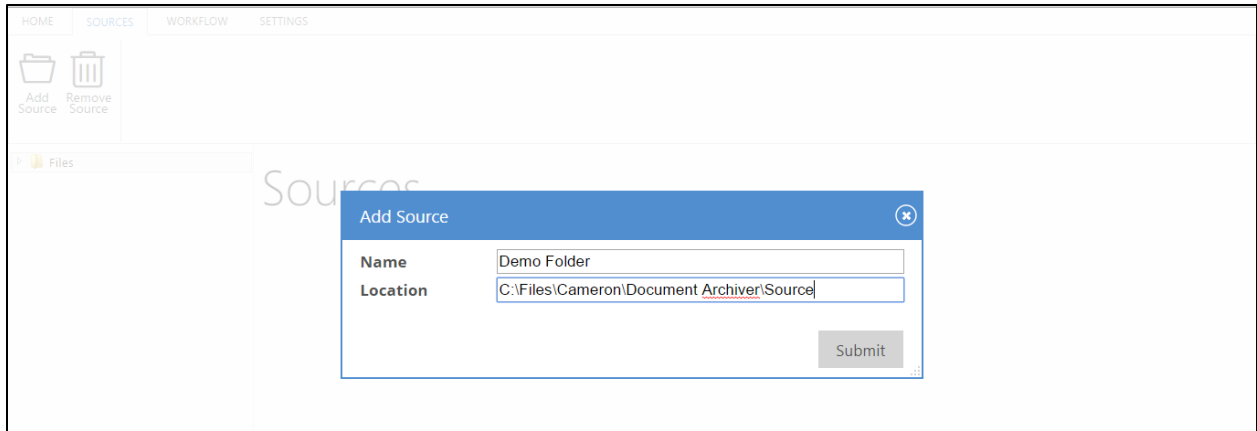
Source folders are predefined locations where files are stored and allow users access. Source folders need to be configured in Document Archiver before users can access them. In order to do this, go to “Sources.”



Select “Add Source” in the top left hand side of the screen.



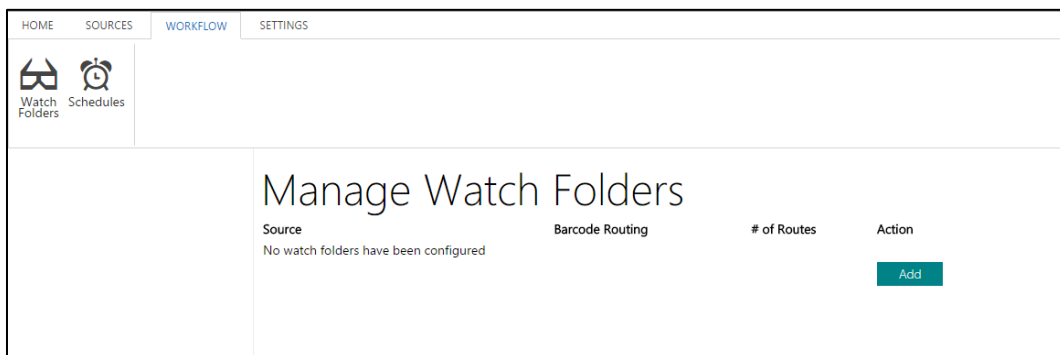
Add the location of the folder that you want to act as a Source and select “Submit.”



Managing Watch Folders

Watch Folders are the locations on your server that Document Archiver will look for new files to organize.

To configure Watch Folders, select “Workflow.”



To set up a new Watch Folder, select “Add.”

Source Folder is the aforementioned location that Document Archiver will monitor.

The **Use Barcodes for Routing** option allows Document Archiver to organize documents by either multiple types of documents (Word, Excel, PDF, etc.) or by only one document type. If you are only using this program for scanning documents such as JPEGs or PDFs then select “Yes.” If you are organizing several different file types then select “No.”

Scan Subfolders allows Document Archiver to scan any additional folders within the selected folder you’ve set up as the source folder.

Process Incoming Documents By allows you to dictate whether or not you want to organize the file by the date they were modified, the date they were uploaded, or by document title.

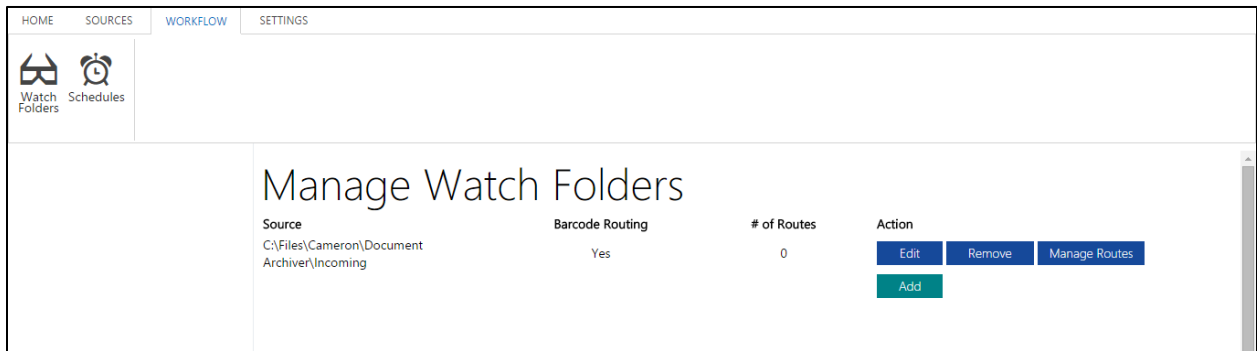
If you enable the **Move Failures** feature then any failed documents that get stuck in the queue, whether due to a timeout or the file is too large, will be moved into a specifically made folder allowing the user to review any errors.

Select **Submit** to save the Watch Folder.

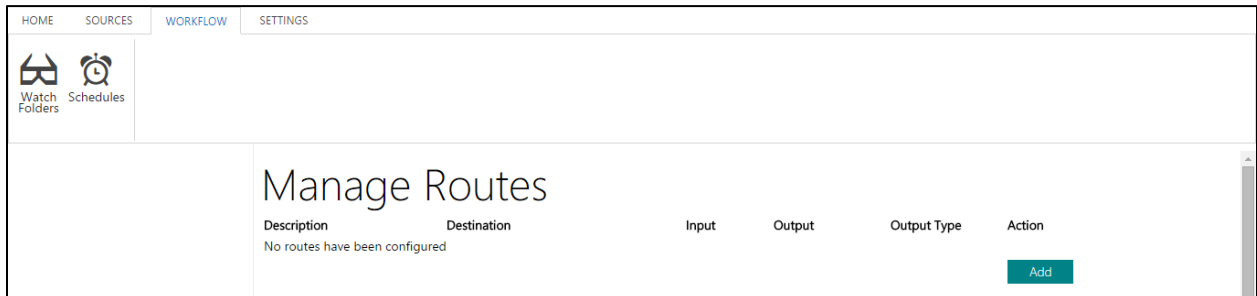
Managing Routes

Routes are the options that control the process of moving the documents to a permanent folder based on name and content. They also contain the options to convert and manipulate the source documents into different formats (eg. PDF, TIFF, etc.) for final filing.

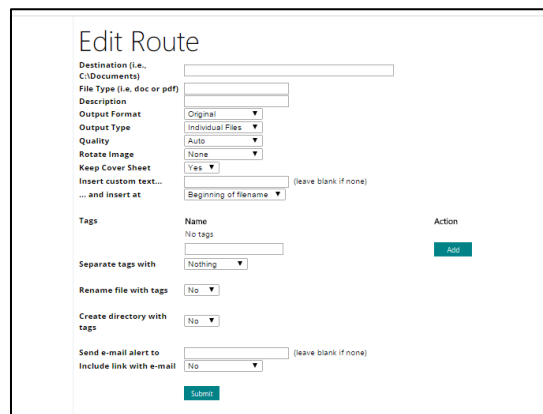
In order to manage the **Routes**, go to **Workflow** → **Watch Folders**. You'll see a list of Watch Folders you set up.



Select "Manage Routes."



Select "Add."



These options will allow you to edit the route. Let's set the route to go to the Source folder we set up earlier. Enter the Destination Folder and fill out the other options.

The screenshot shows the 'Edit Route' configuration window. The settings are as follows:

- Destination (i.e., C:\Documents): C:\Files\Cameron\Document Archiver\Source
- File Type (i.e. doc or pdf): PDF
- Description: Source for PDFs
- Output Format: PDF
- Output Type: Individual Files
- Quality: Auto
- Rotate Image: None
- Keep Cover Sheet: Yes
- Insert custom text... and insert at: Beginning of filename
- Tags: Name: No tags, Action: Add
- Separate tags with: Nothing
- Rename file with tags: No
- Create directory with tags: No
- Send e-mail alert to: (leave blank if none)
- Include link with e-mail: No

File Type dictates what kind of file is processed by this route.

Description allows you to add a description for the route that will help you or other users to identify its purpose.

Output Format is either Original, PDF, or TIFF depending on the Format you have the Watch Folder set up to be. PDF and TIFF are typically for scanned documents since this is their final product. Original files are other file types like Word or Excel documents.

Output Type dictates whether or not the items will be sent as a series of individual items (Individual Files) or compiled into one large object (Stacked Files). Generally, the Stacked Files option is useful if you are scanning a large series of documents since it will be submitted as one file instead of multiple.

Quality allows you to set a specific image quality for the output file. This option only applies certain file types.

Rotate Image lets you take the default orientation and rotate it as needed before it arrives at the source. This is handy if you have to scan images with an unusual orientation based on hardware or format limitations.

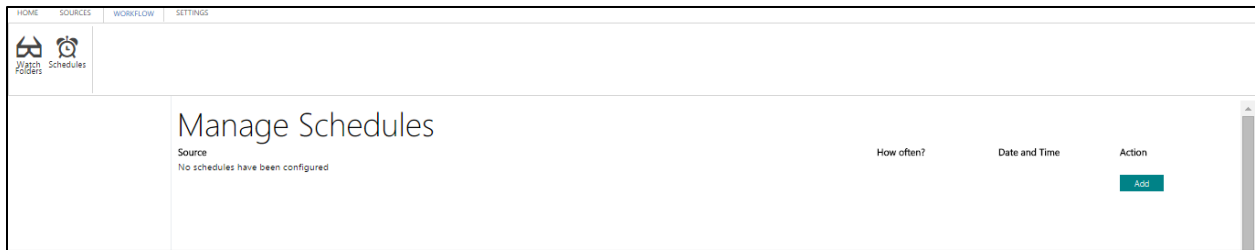
Keep Cover Sheet states whether or not the sent cover sheet will be kept when the document is sent from the Watch Folder to the Source Folder.

Insert Custom Text allows you to add text to any file that is being sent through this route. It can either be added to the beginning or the end of the file name. This is useful if there needs to be some segregation between different files and a naming convention is used to do this.

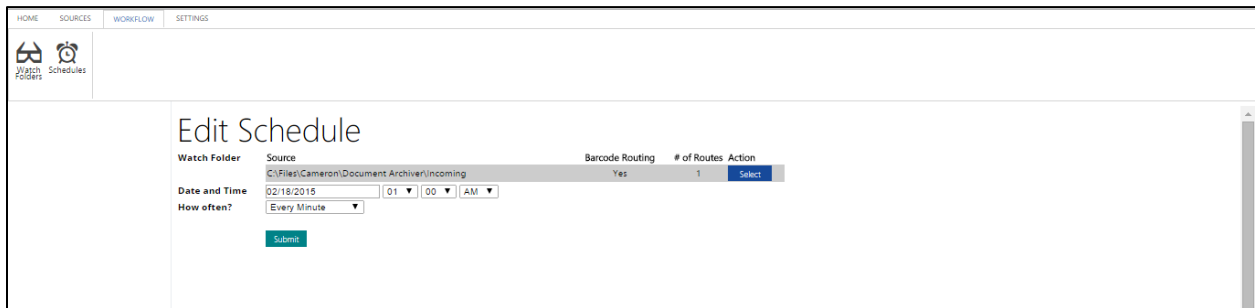
Tags are important because they will allow you to add the identifiers to the Cover Page as well as manipulate the directory they're sent to. They can also change the file directory names for any item sent along this route.

To begin adding tags, just type them into the dialogue box and select "Add."

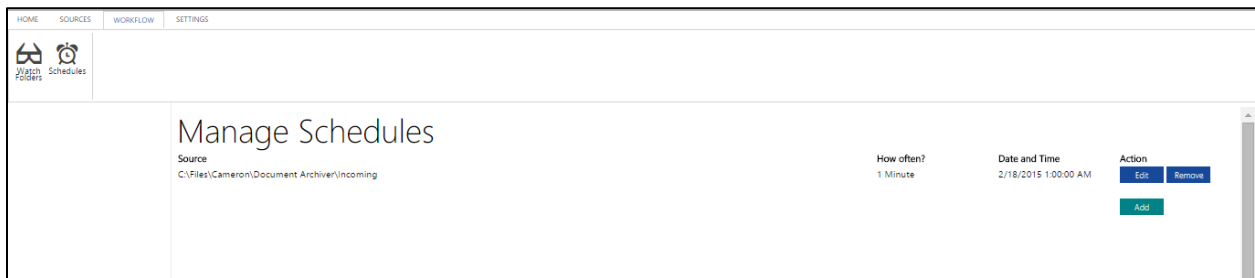
To Manage the Schedules, go to **Workflow** and select **Schedules**.



Select "Add."



Fill out the requested information and select "Submit."



A list of schedules will now be displayed.

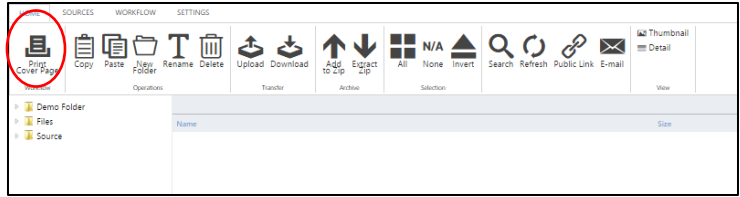
Document Management

Macro Document Management

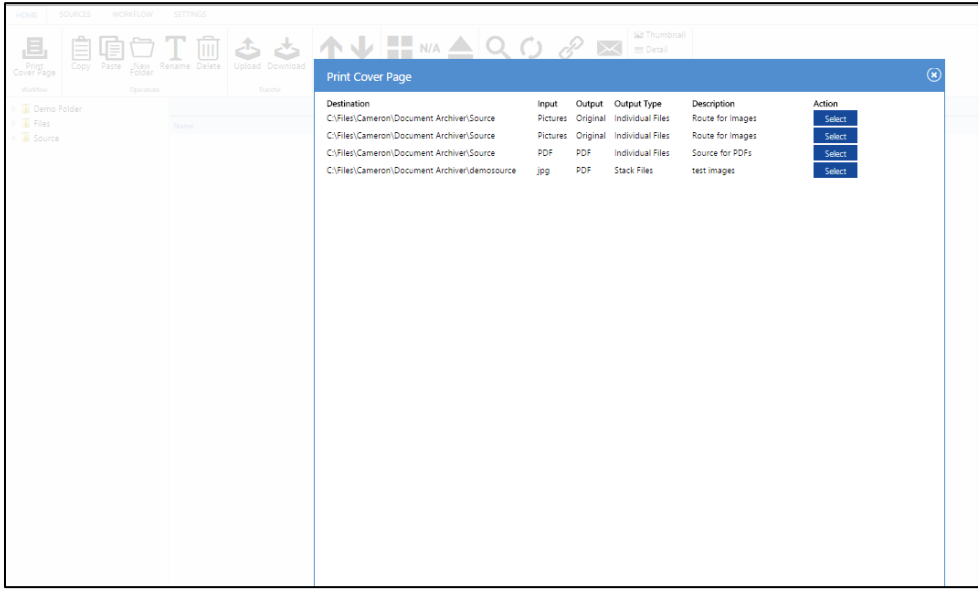
Now that the Watch Folders, the Routes, and the Source Folders have been set up and the schedules are made we can begin uploading documents to the server.

In order to scan documents that will be recognized by Document Archiver, you will need to print off a **Cover Page** and place it on the front of the documents you wish to scan. You will need separate **Cover Pages** for documents that need to go to separate places.

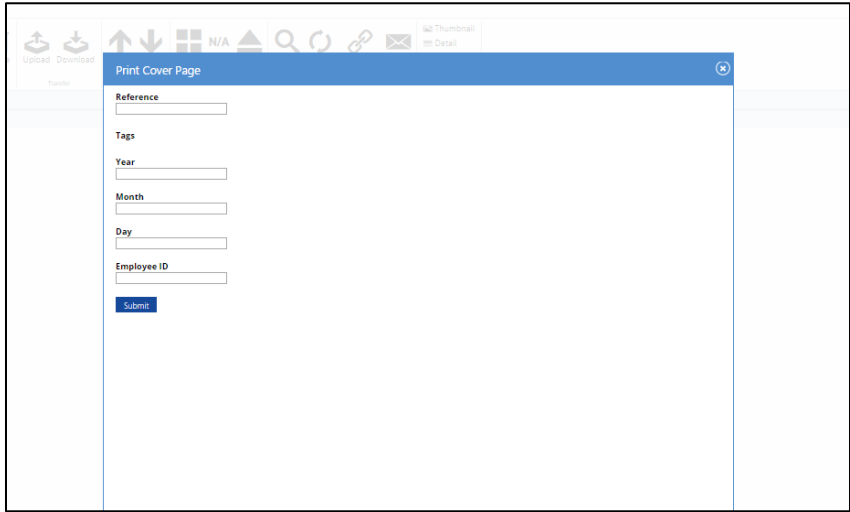
Cover pages can be printed by selecting "**Print Cover Page**" at the top left hand side of the home page.



The routes we set up earlier will be displayed:



Select which route you'll want these documents to go through:



The Tags we built are now here as data entry fields. Fill this section out (along with a reference number) and select "Submit" to generate your Cover Page.



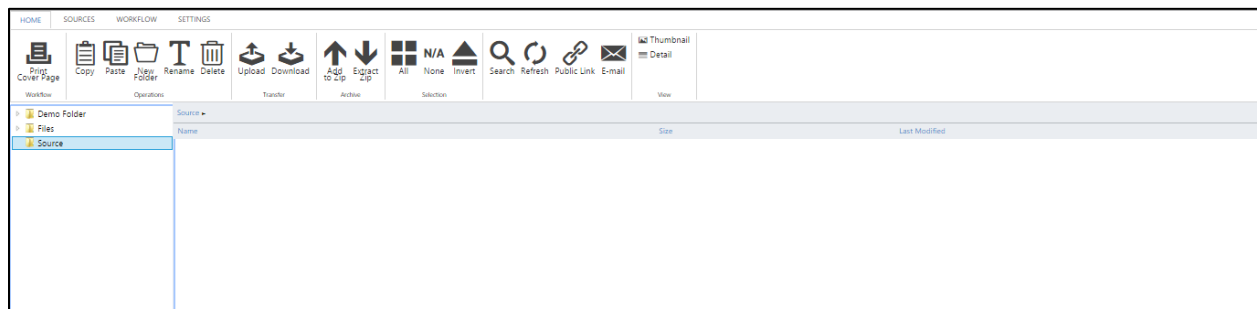
Select “Print” and run this document off.

By placing the **Cover Page** as the first page of the document allows Document Archiver to identify it once it’s in a Watch Folder.

Micro Document Management

In addition to managing documents in mass via watch folders, routes, and source folders, Document Archiver allows you to manage documents individually, link directly to documents, and other useful functions.

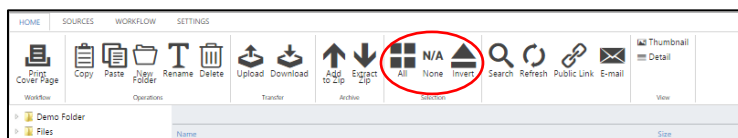
In order to manage documents, go to the home page by selecting “Home” in the upper left hand side of the screen.



You most likely saw this screen when you logged in. Sources are on the left hand side of the screen that you’ve already built. The right side of the window shows content that you have selected. In order to navigate the folders, double click the folders on the left side of the screen to enter it or click it once to view the item in the document. This is the easiest way to review documents inside of Document Archiver.

Selecting Items

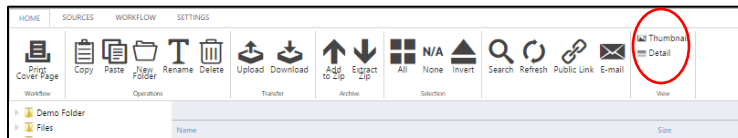
In the instance of a folder with a large number of objects, Document Archiver allows you to select multiple items. At the top of the screen there is a selection sub area.



Here you can either select **All** items in a folder, deselect all items by pressing **None**, or **Invert** your selection. This means all items you have selected will be deselected and those not selected will be selected. This is useful if you want to select all but a handful of items since you will only have to select those items and then select Invert.

Changing file Views

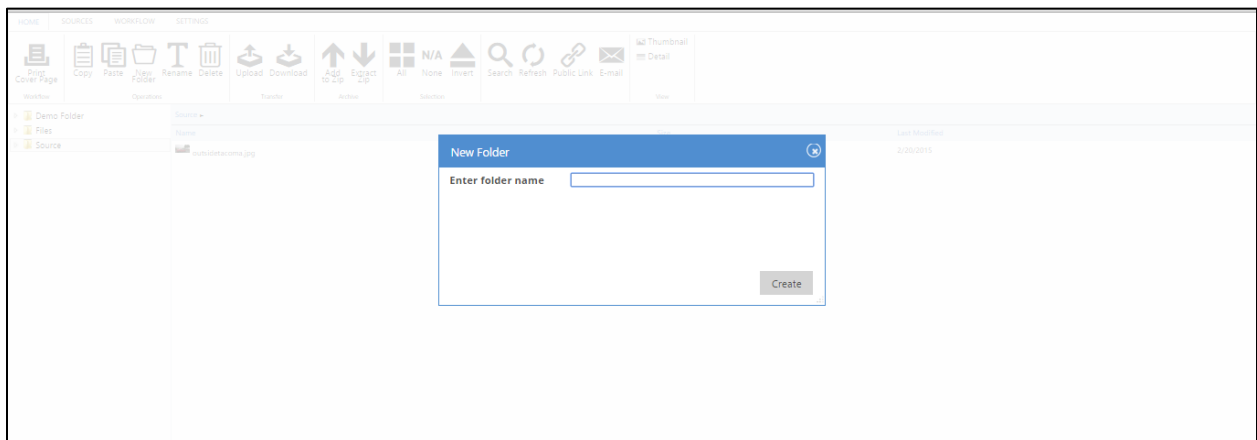
In the top right side of the screen is a section of icons that allow you to change the view between “Thumbnail” and “Detail.”



Thumbnails allow for small visual images of the content in the file, while Detail views provide more information such as file name, size, and date of last modification.

Making New Folders

Select “New Folder” at the top left side of the screen to make a new folder.

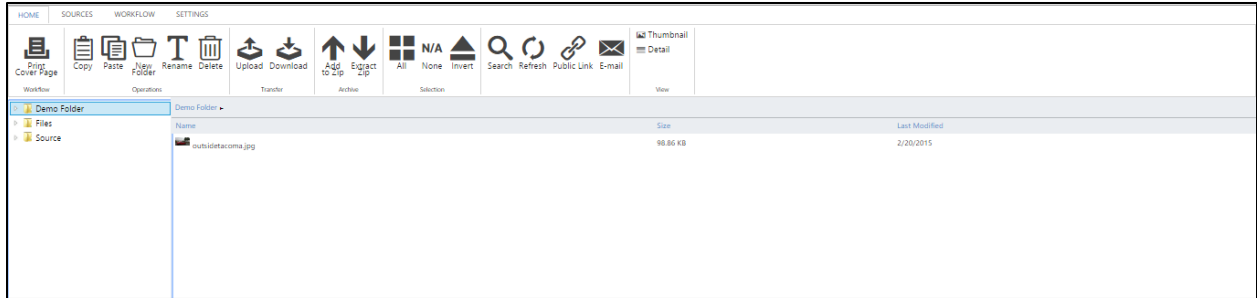


Enter the file name and select “Create.”

Uploading and Downloading Individual Documents

To upload documents to a source or watch folder, navigate to the source folder and select the “Upload” icon at the top of the screen. A dialogue box will open for you to navigate to the file on your local computer and open it.

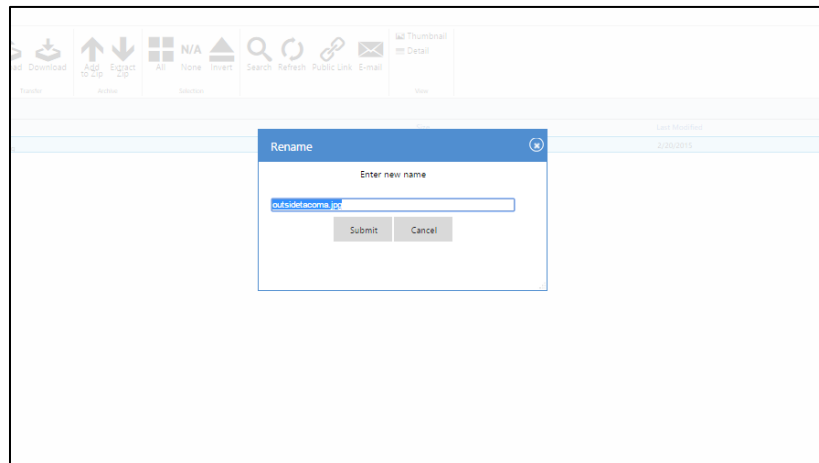
The document will now be uploaded to the folder.



To download a document from Document Archiver to your local computer, select the item, and click the “Download” icon at the top of the screen.

Renaming Files

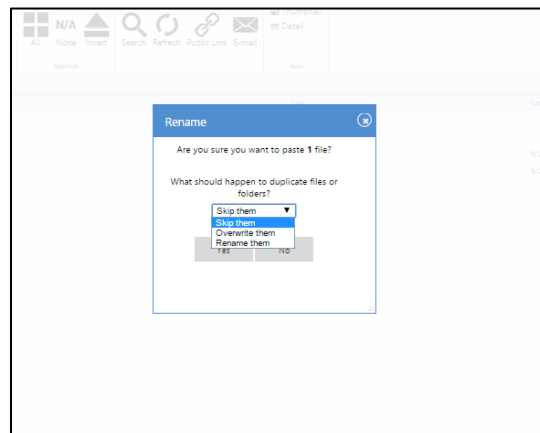
Select the file you want to rename and select “Rename” at the top of the screen.



Enter the new name of the file and select “Submit.” The file name will now be changed.

Copy and Pasting Files

Select the file you’d like to copy and select “Copy” in the top left hand side of the screen. Navigate to the folder you want to copy the file to and select the “Paste” button. When you go to paste the files into the new folder the following options will be displayed:



In the instance of duplicate files that might be present, you are able to skip copying them, overwrite them, or rename the new files.

Delete Files

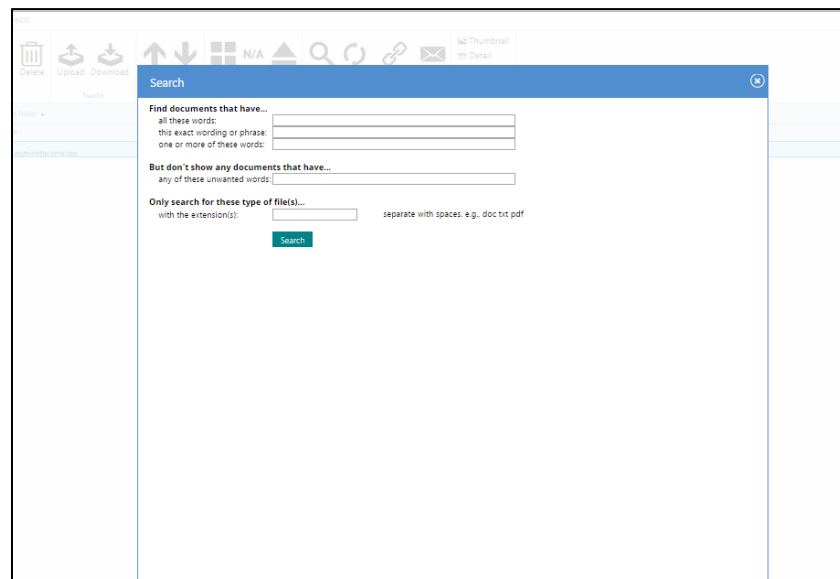
In order to delete a file, highlight it and select the Trash Can “Delete Item” icon.

Refreshing Screen

Select **Refresh** to check the folder for changes that might not be displayed on the screen.

Search Files

Select the Magnifying Glass icon at the top of the screen to search through all of the files:



The screenshot shows a search interface with the following fields and options:

- Find documents that have...**
 - all these words:
 - this exact wording or phrase:
 - one or more of these words:
- But don't show any documents that have...**
 - any of these unwanted words:
- Only search for these type of file(s)...**
 - with the extension(s): separate with spaces, e.g., doc.txt pdf

A green **Search** button is located at the bottom of the search panel.

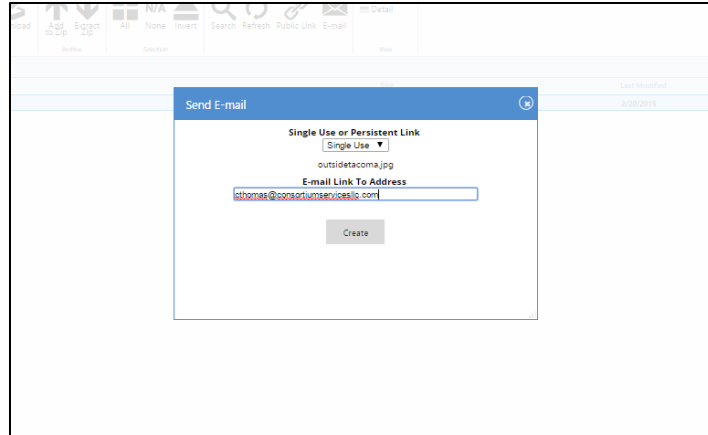
Enter any of the parameters you wish to search by and select “Search” to begin a new search.

Emailing Files

Document Archiver also allows for you to **Link** and **Email** files and folders from Document Archiver to an external source.

To **Email** a document, select the envelope shaped “Email” button.

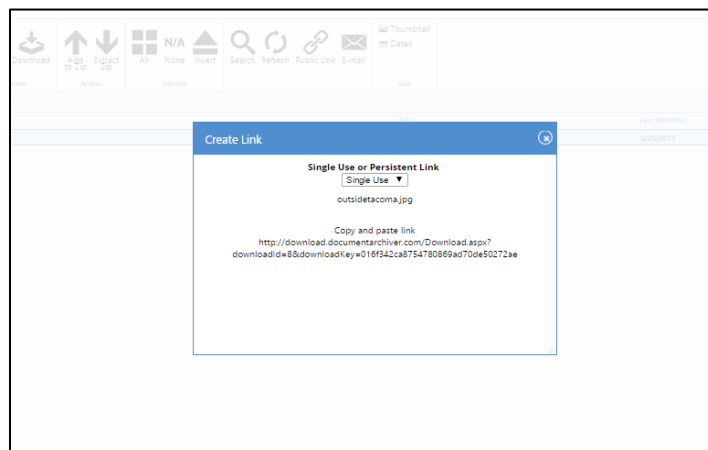
You will have the option to allow this link to be used a single time or to keep it persistent so that it may be used multiple times.



Enter the email address you wish to send the file to. This feature enables you to send large documents that could not be sent in an email.

Linking Documents

If you prefer to make a link directly to the document –useful if you were posting the document onto a website or in an email for mass dissemination—select the “Link” icon at the top of the screen.



As with the email section this link can either be used once or as a persistent link.

Settings

Settings will allow you to set up the email address for alert notifications (If you enabled them at the Route option menu), the text that gets sent with that alert, the server location and port number, the username, password, the indexing catalog, and the public URL.

HOME SOURCES WORKFLOW SETTINGS

System Settings List Settings

System Settings

Send E-mail From	<input type="text" value="filemanager@theconsortium.org"/>
E-mail Subject	<input type="text" value="You have a file download"/>
Server	<input type="text" value="10.253.1.32"/>
Port	<input type="text" value="25"/>
Username	<input type="text"/>
Password	<input type="password"/>
Indexing Catalog	<input type="text"/>
Public URL	<input type="text" value="http://download.documentarchiver.com"/>

Select "Submit" to save.