



**PaperClip32**

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# *Quick Start Guide*

## Copyright Information

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This Quick Start guide, intended for the system administrator and a typical user, provides exercises for setting up a system and using PaperClip32 to perform typical document management tasks. This includes:

### Administrative Tasks

- Add a Workstation
- Add a User Account
- Add a Bin
- Add Document Types
- Add a Drawer and Folder
- Create a Query

### Using PaperClip32

- Open a Folder
- Scan Documents into PaperClip32
- Index a Batch
- Import an Image Document
- Working with SoftClip Documents
- Use Quick Folder
- Execute a Saved Query
- Route a Document

On your PaperClip32 CD in the \Docs\Pclip32 directory you will find detailed instructions on all PaperClip32 administrative and user tasks in the manual titled *PaperClip32UserGuide.PDF*.

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**Note:** If you are the system administrator, refer to the Introduction and System Setup & Administration sections in the *PaperClip32 User Guide* for detailed instructions.

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After completing the exercises in this guide, you may delete the objects (drawers, folders, documents, etc.) you create

### A Note About Clipping

There are two ways to integrate PaperClip32 with the application or applications you use to operate your business. One is with our API and the other is with our Visual Context Processor™ (VCP). This guide has a number of references to the VCP but we use the terms “Clipping” or “Clipped to.” This is the concept that PaperClip’s VCP “Clips” PaperClip32 to another application.

If your business applications or applications have been “Clipped to” PaperClip32, you would be able to select a record in your application and press the user-defined VCP hot key such as Ctrl F3 and the PaperClip32 folder for that record would appear displaying all imaged and SoftClip files (files created in an application such as Word or Excel). If there isn’t folder for that record, PaperClip32 would ask if you want to create one. It would do that by extracting the necessary information from the “Clipped” application.

### Add a Workstation, a User Account, and a Bin

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Workstations should be set up before user accounts are created. Workstation configurations are specific to individual workstations on the network. If the workstation will be used with a scanner, the scanner interface must first be defined.

The user account identifies your employees by name and password (optional) for the system login. User accounts also define user privileges, determining which PaperClip32 tasks employees can perform, and on which objects (batch, drawer, folder, document, note, overlay, package, and query) they may perform the tasks.

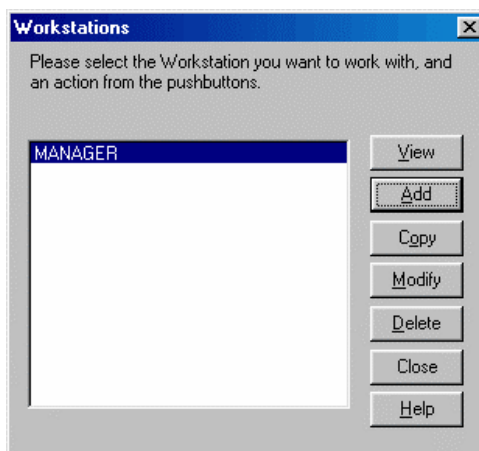
PaperClip32 users can store documents in different on-line or near-line storage bins according to the document type they wish to store. Documents requiring frequent retrieval may be stored on-line, while documents that are retrieved less frequently may be stored near-line.

#### Add a Workstation

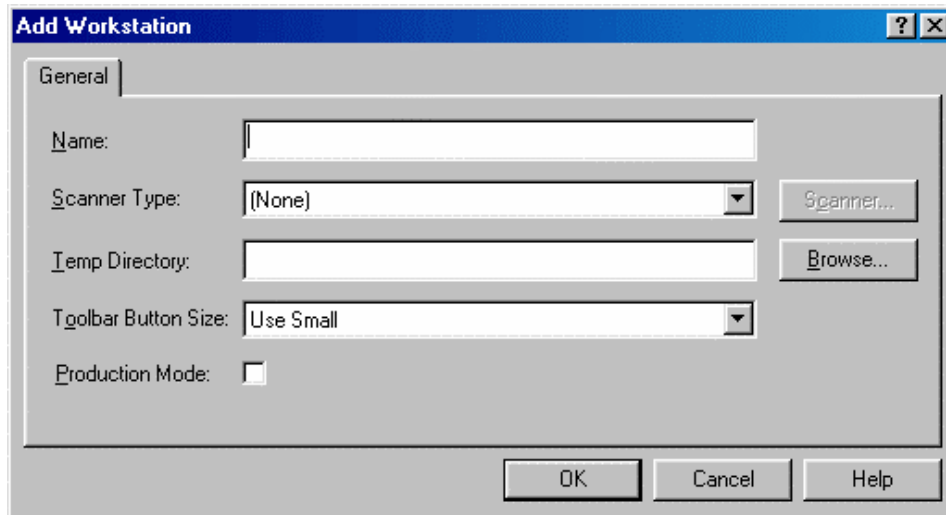
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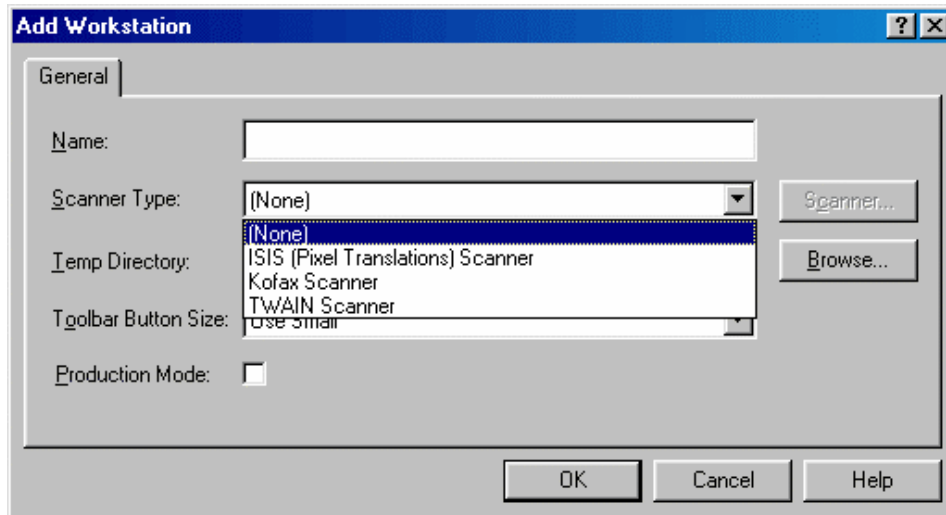
1. Choose **Workstations** from the *Setup* menu. The *Workstations* dialog box appears. In this example, it shows the Manager workstation. This is the default workstation name assigned to the first client. If other workstations were installed on your system before this exercise, they also would be listed.



2. Click Add. The *Add Workstation* dialog box appears with the General tab controls displayed.



3. In the **Name:** box, type the computer name assigned to the workstation.



4. If this isn't a scan station, leave the **Scanner Type:** list box at the default setting of (None). If this is a scan station, use the drop-down list to select the appropriate scanner type.

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**Note:** The ISIS Scanner selection is for existing systems that were upgraded from version 5.0. Do not select ISIS for new installs.

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5. The **Temp Directory:** is a local directory location for temporary file storage during scanning, faxing, and image retrieval. No entry is required and should not be changed for this exercise
6. Use the **Toolbar Button Size:** list box to set the size of the toolbar buttons that display in PaperClip32.
7. Select the **Production Mode:** check box to enable Production Mode capability for this workstation. See the Production Mode section in the Customizing Your System chapter of the *PaperClip32 User Guide*.

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**Note:** Production Mode must be enabled in the user account record (see the next section “Add a User Account”) for this setting to be enabled.

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- Click **OK** to save the workstation configuration. Then click **Close** to close the Workstations dialog box and return to the main PaperClip32 desktop.

## Add a User Account

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In order for your employees to access and use PaperClip32, they must be assigned an individual user account. At the time your system was purchased, one or more of the Full Production, Desktop Workstation, and Viewer user profiles were selected. User profiles are described below:

Full Production	This type of user can create, modify and delete documents if given the appropriate rights. Also, the user can view, print, fax, e-mail and annotate documents and send packages to other users. This user profile is required for scan stations.
Desktop Workstation	This type of user can modify and delete documents if given the appropriate rights. Also, the user can view, print, fax, e-mail and annotate documents and send packages to other users.
Viewer	This type user can view, print, fax, and e-mail documents.
Admin	This user type is intended for the system administrator. The Admin user has the same rights as a Viewer user and the additional rights to perform setup operations.

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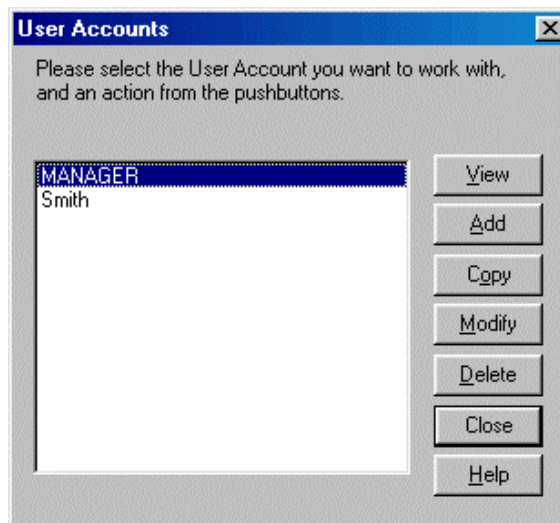
**Note:** The system administrator can use this user account for all setup operations.

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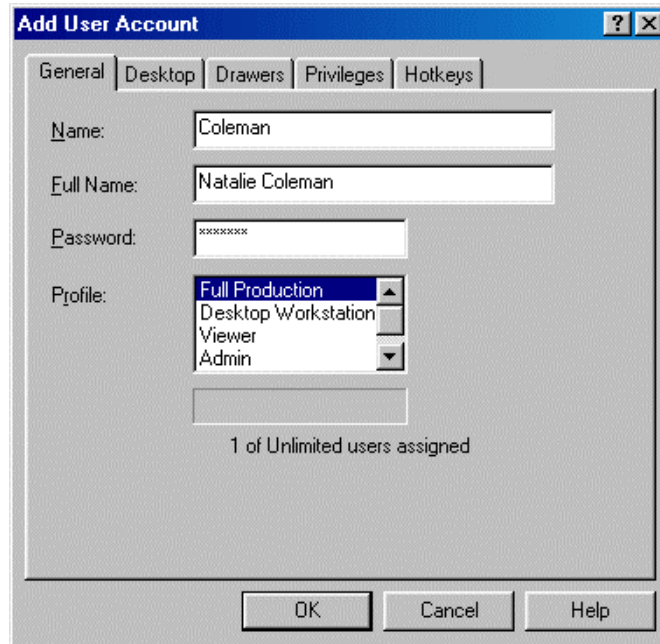
Inactive	This user type disables the user login.
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The user account also enables you to set up a personal drawer and to change the default hot-key assignments for the employee.

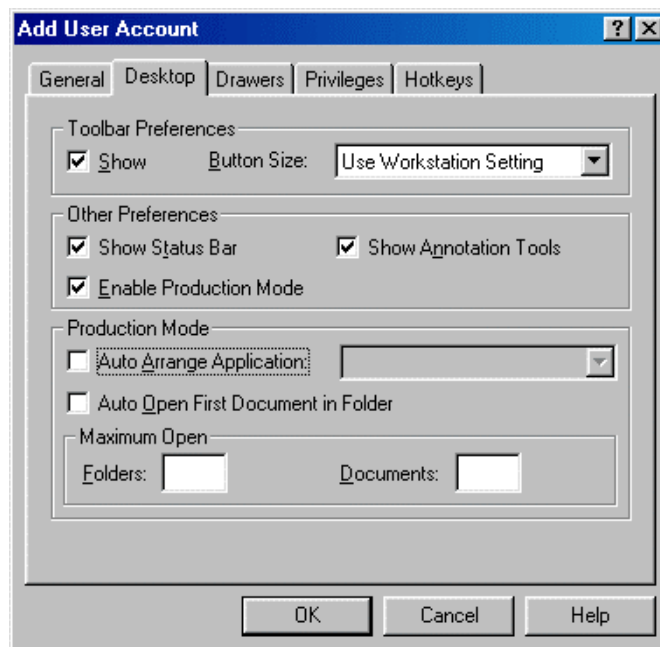
- Select **User Accounts** from the *Setup* menu. The *User Accounts* dialog box appears with the accounts defined in the system displayed. At this time, it may just be the MANAGER account.



2. Click **Add**. The *Add User Account* dialog box appears with the *General* tab displayed.



3. Enter the user's login name. When a user launches PaperClip32, the network login name will appear in the Login Name box. If you want to use the network login name as the user's login, enter that name in the **Name:** box and the user's full name (up to 30 characters.) in the **Full Name:** box.
4. In the **Password:** box, you may type a password for the user (password not required). As you type the password, PaperClip32 displays asterisks (\*) for each character.
5. Select the user's profile in the **Profile:** box.
6. Choose the *Desktop* tab to configure the user's desktop.



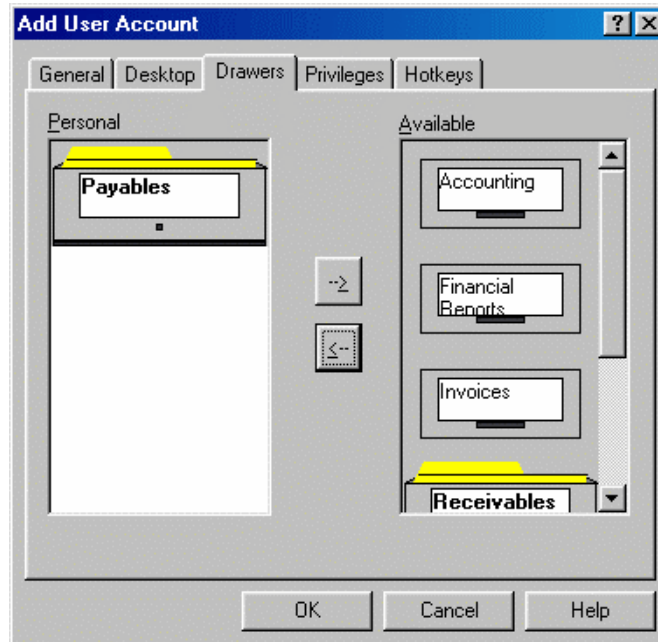
7. In *Toolbar Preferences*, select your preferences for displaying the toolbar and the toolbar button size.
8. In *Other Preferences*, select your preferences for displaying the status bar, displaying the annotation tools, and enabling Production Mode. Selecting **Enable Production Mode** activates the settings in the *Production Mode* group box with additional options for Production Mode processing.
9. If you have checked **Enable Production Mode**, to automatically arrange an application on the desktop whenever the employee logs on, check **Auto Arrange Application**. When you do, the drop-down Application list becomes active.

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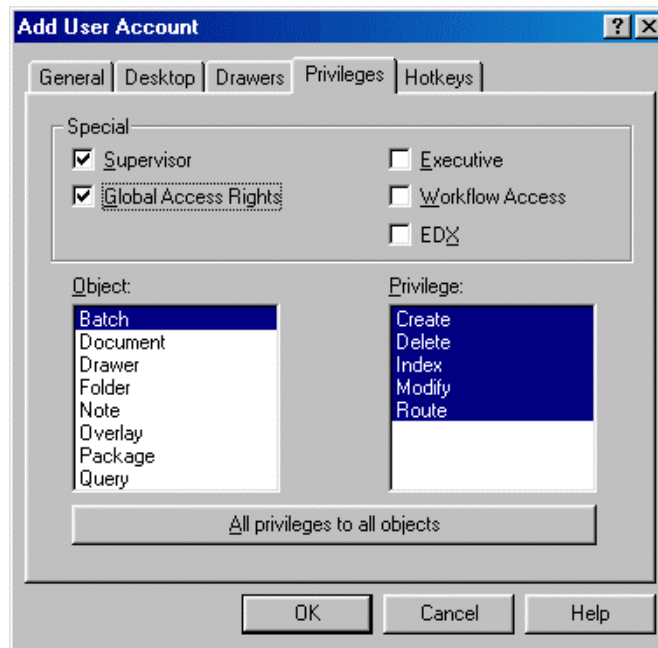
**Note:** Application must be an application Clipped to and the application must already be open when you launch PaperClip32.

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10. Check **Auto Open First Document in Folder** to automatically open the first scanned document in a folder when the folder is opened.
11. In the *Maximum Open* group box, set the maximum number of folders and documents that can be open at one time. This is not required. No entry means that the user can open any number of folders and documents at one time.
12. Choose the *Drawers* tab. Here you can select a personal drawer or drawers to display in the Open Folder selection window. If you do not select a personal drawer or drawers, all the drawers available to you will be displayed when you are in the *Open Folder* selection window.



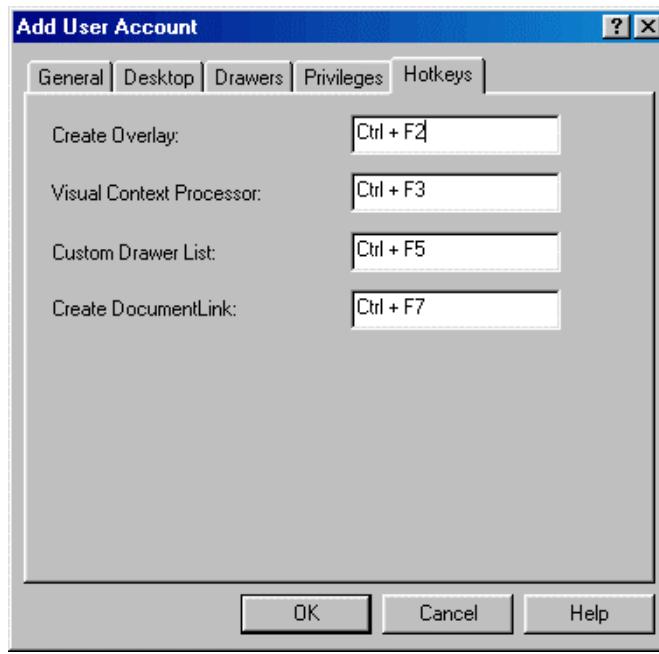
13. Select the *Privileges* tab to set the privileges.



14. If the user you are defining is a Full Production user, select your preferences in the **Supervisor**, **Global Access Rights**, and **Executive** check box. Checking **Supervisor** gives this user rights to system setup functions and automatically assigns all privileges in the Privileges table.

You can assign **Global Access Rights**, whether or not they are a supervisor. This enables the employee to access all drawers, folders, and documents, regardless of their ownership. You need to consider security issues and access to confidential documents when you assign supervisory privileges and global access rights. The combination of user privileges and task group membership determines how your employees may use PaperClip32 features and functions.

15. To grant a user privileges to all the objects their user profile allows, click on **All privileges to all objects**. To grant selected privileges, select an **Object:** then the **Privileges:** allowed.
16. Select the *Hotkeys* tab if you want to modify the default hotkeys. You would typically change a hotkey if another application on the workstation uses the same hotkey as PaperClip32. This is not required for this exercise.



17. Click **OK** to save the user account record. Then click **Close** to close the *User Accounts* dialog box and return to the main PaperClip32 desktop.

## Add a Bin

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You can store documents in different on-line or near-line storage bins. Documents requiring frequent retrieval may be stored on-line, while documents that are retrieved less frequently may be stored near-line.

An on-line bin is a directory on the local or network hard drive. Typically on-line media provides faster access but less storage capacity as compared to near-line media. Near-line bins are used to store documents to different locations on a fixed or removable DOS drive (e.g., magnetic, magneto-optical, or removable media storage drives). Near-line bins may also be defined as one of many PaperClip Network Object Storage Subsystem (NOSS) servers.

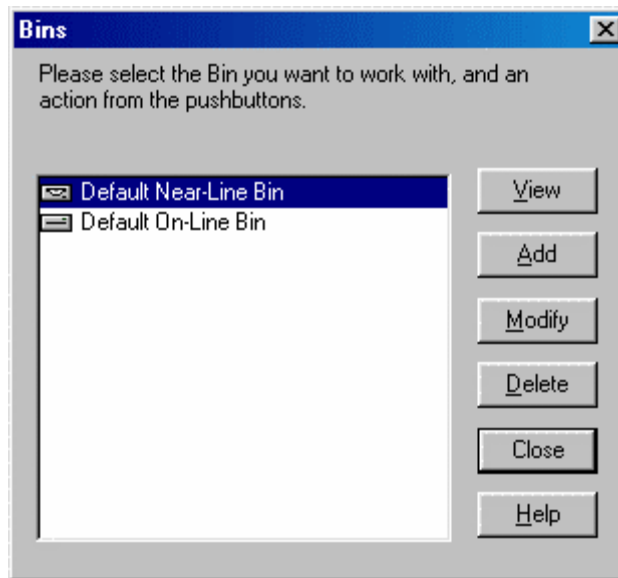
This exercise demonstrates the steps to add an on-line bin.

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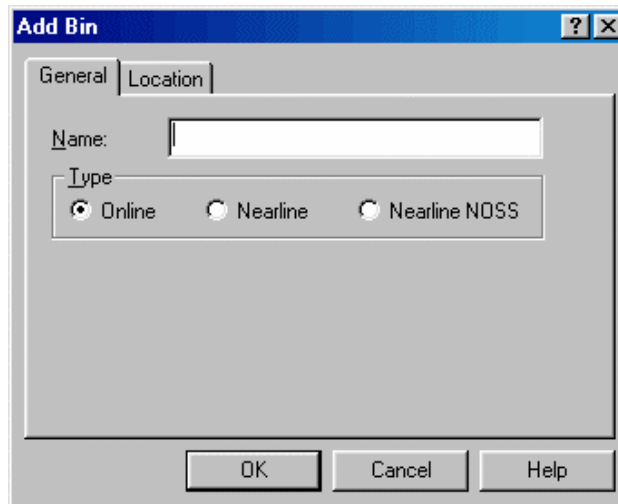
**Note:** A default on-line bin is established at installation. The initial storage location for this bin is DEFBIN. The DOS directory that is to be established as a bin must be created before beginning this procedure. Multiple storage bins cannot share the same directory.

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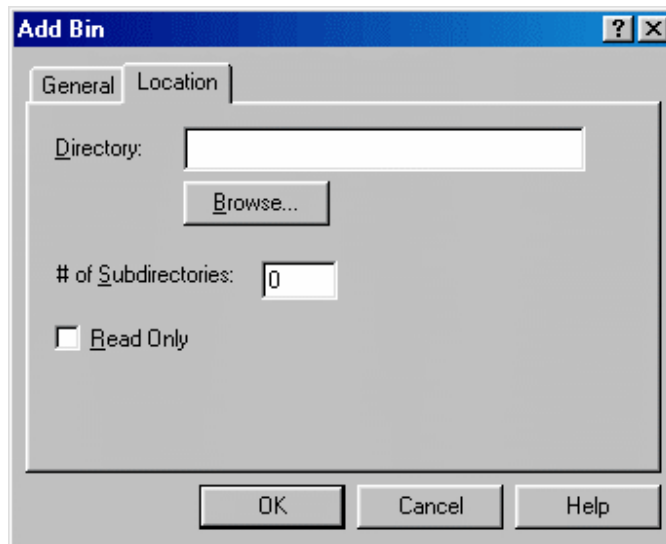
1. Select **Bins** from the *Setup* menu. The *Bins* dialog box appears.



2. Choose **Add**. The *Add Bin* dialog box appears with the *General* tab controls displayed.



3. Enter a name for this on-line bin and select Online.
4. Click the *Location* tab and type the directory location for the on-line bin you are creating. Optionally choose **Browse** to specify an appropriate directory location.



5. To write files to a subdirectory tree, enter the desired number next to **# of Subdirectories**. Writing files to subdirectories provides better file system performance for very large bins. You can change this value if desired with no harm to the system. You can also set a value for existing Bins. In this case all previously written files will remain where they are, only newly created files will go into subdirectories.
6. Choose **OK** to save this on-line bin location information and return to the *Bins* dialog box.
7. Click **Close** to return to the PaperClip32 desktop.

## Add Document Types

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Now that you've set up a workstation and a user account, you will need to set up Document Types. Document Types are essentially how you specify to the PaperClip32 system the different types of documents that you will be working with, such as memos, invoices, bills of lading, personnel records, and more. PaperClip32 supports SoftClip Application Document Types, documents created in an application such as Word or Excel, and PaperClip32 Image Document Types, the scanned images created with a workstation scanner. The file type associated with the application, the .doc file with a word processing application or .pci for a PaperClip32 image file, is the basis for the document types that you specify. You can specify multiple document types for any one file type.

In this exercise, you will define a document type named Client Letter and associate it with the Microsoft Word .doc file type. You will also define a PaperClip32 Image Document Type named Invoice and associate it with the PaperClip32 Image Document .pci file type.

### Add a SoftClip Document Type

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Documents, sound files, pictures, movies, etc. you create with another application can be stored as SoftClip documents in any folder. Any true 32-bit Windows compatible application qualifies as a SoftClip application. Creating this link is automatic with PaperClip32.

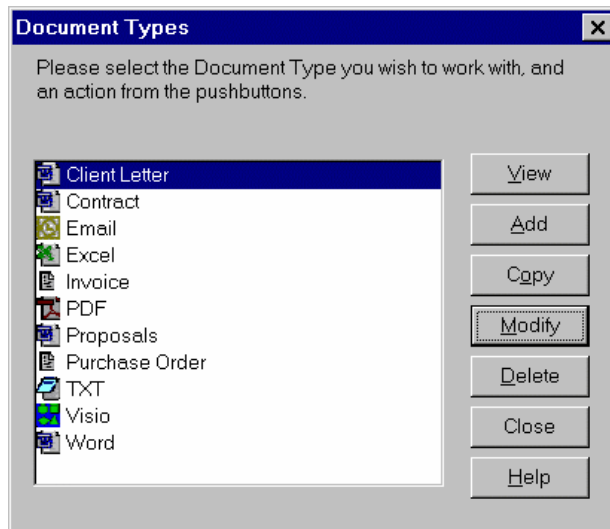
PaperClip32 automatically detects any application installed on the server or the workstation, and registered in the Windows Registry. The file types associated with those registered applications are also detected and integrated within your PaperClip32 system.

You can add a SoftClip application to your PaperClip32 system simply by installing it to the server or workstation. The associated file type is also included.

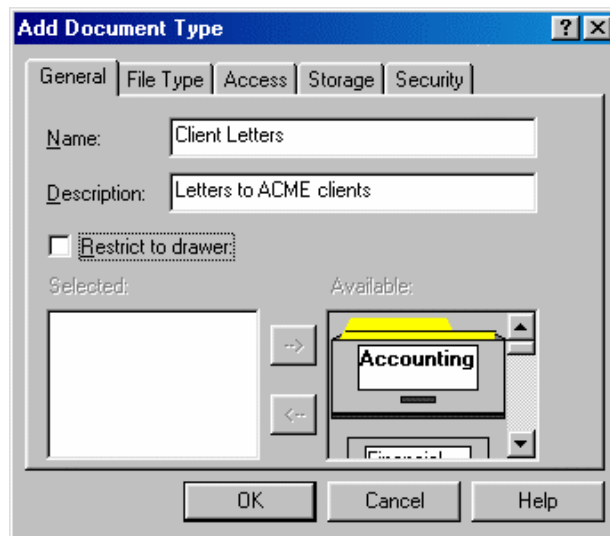
More than one document type can be assigned to each SoftClip application. For example, word-processing documents can be grouped into smaller categories, such as purchase orders, invoices, and client letters. SoftClip documents should be stored in a network directory so that multiple users may access them.

For this exercise we are adding a new SoftClip Document Type where the file type is a Microsoft Word .doc file.

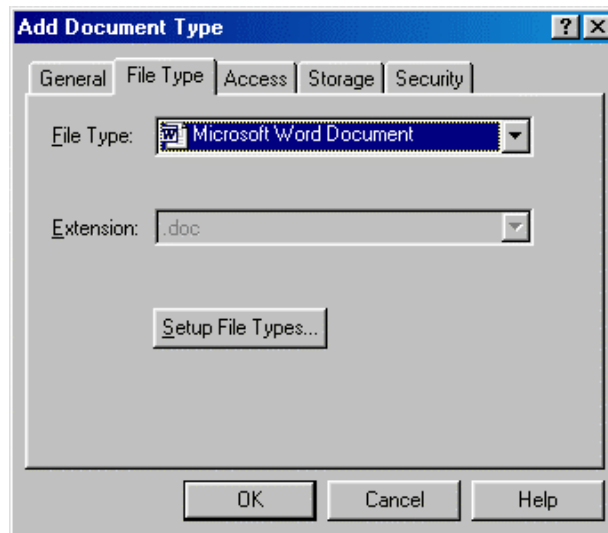
1. Select **Document Types** from the *Setup* drop-down menu. The *Document Types* dialog box appears.



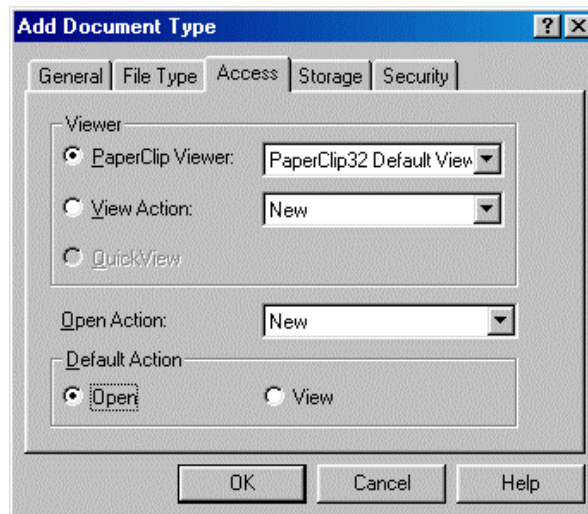
2. Choose **Add**. The *Add Document Type* dialog box appears with the *General* tab controls displayed.



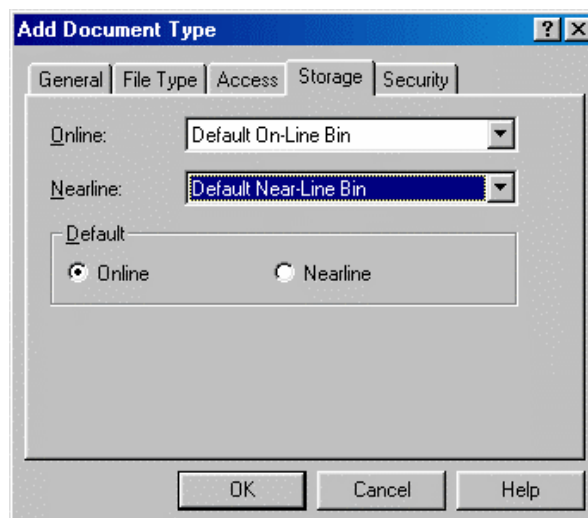
3. Enter a name and description. In this exercise, the name is Client Letters, and this document is a record of official company letters sent to clients. The documents with this document type can be restricted to a drawer. If you check **Restrict to drawer**, select a drawer, and click on the left arrow.
4. Select the *File Type* tab. Open the drop-down list then locate and select Microsoft Word Document. The **Extension:** text box displays the file extension of the selected file type.



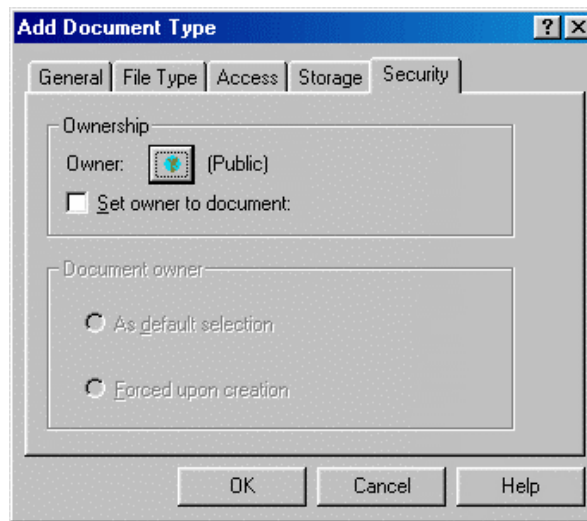
5. Click on the *Access* tab and select **Open** in the *Default Action* area. This will launch Word when you select a Word document to view.



6. Click on the *Storage* tab



7. You can select the default location as Online or Nearline and the appropriate Online or Nearline bin. No need to change these values for this exercise.
8. Click on the *Security* tab.



9. In the *Ownership* area, select an owner for this Document Type by clicking on the **Owner:** button and selecting an owner from the owner selection window. Check **Set owner to document:** to specify the owner selected as the owner of any document created with this Document Type. The radio buttons in the *Document owner* section are active when this box is checked.

When the **As default selection** radio button is selected, the owner will be automatically selected in the owner field when creating a document. The user can change the selection if desired before creating the document.

When the **Forced upon creation** radio button is selected, the owner will be automatically selected as the owner of the document. The user will not be able to change the owner field when this Document Type is specified. To change the owner during document creation, you would select another Document Type that does not have this restriction.

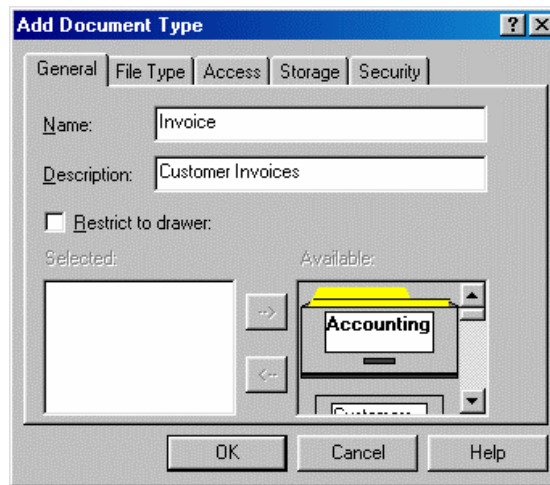
10. Click on **OK** to save this Document Type.

## **Add a PaperClip32 Image Document Type**

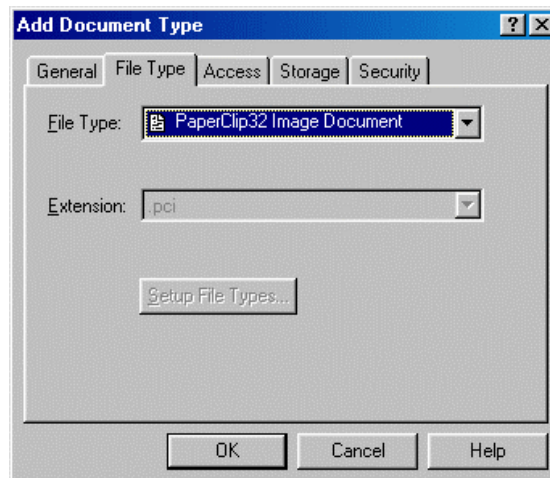
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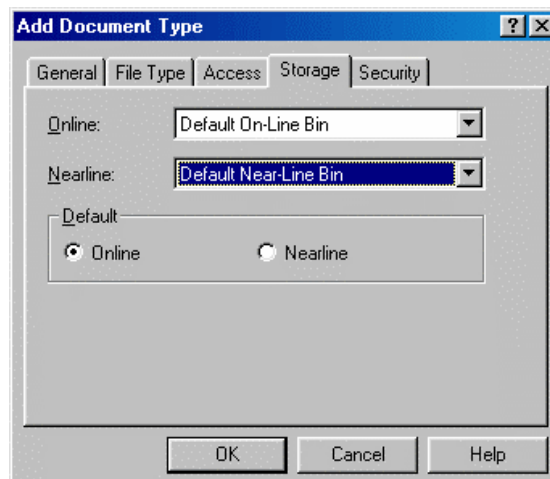
1. To add an Image Document Type, click on the **Add** button in the *Document Types* dialog box. The *Add Document Type* dialog box appears with the *General* tab displayed.



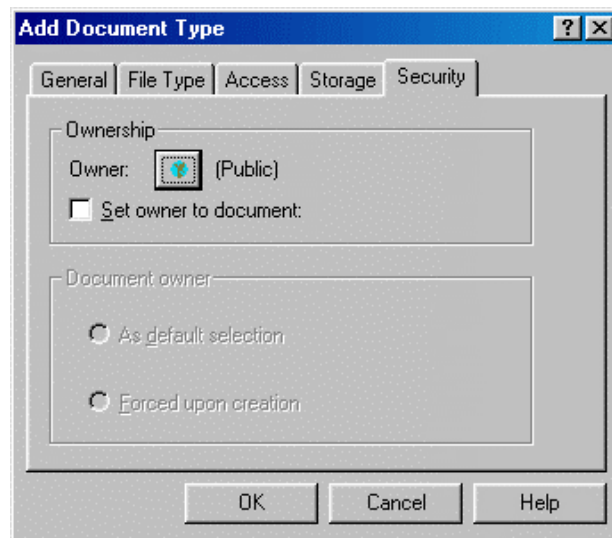
2. Enter the name Invoice and a description.
3. Select the *File Type* tab. The default file type that displays in the **File Type:** window is PaperClip32 Image Document. The extension text box displays the file extension of the selected file type, pci in this case.



4. No changes are required on the *Access* tab.
5. Click on the *Storage* tab



6. You can select the default location as Online or Nearline and the appropriate Online or Nearline bin. No need to change these values for this exercise.
7. Click on the *Security* tab.



8. In the *Ownership* area, select an owner for this Document Type by clicking on the **Owner:** button and selecting an owner from the owner selection window. Check **Set owner to document:** to specify the owner selected as the owner of any document created with this Document Type. The radio buttons in the *Document owner* section are active when this box is checked.

When the **As default selection** radio button is selected, the owner will be automatically selected in the owner field when creating a document. The user can change the selection if desired before creating the document.

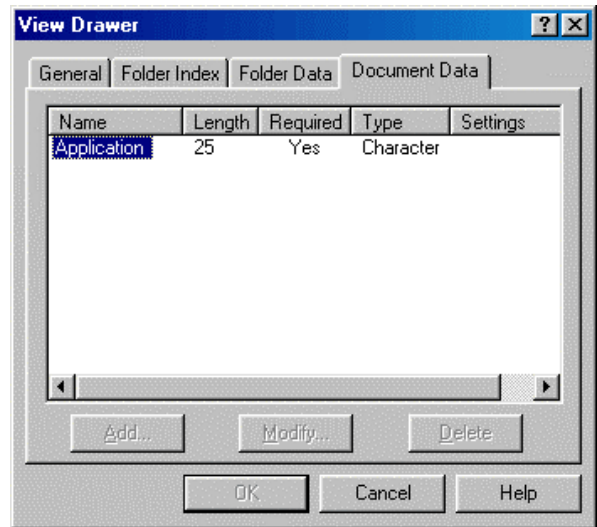
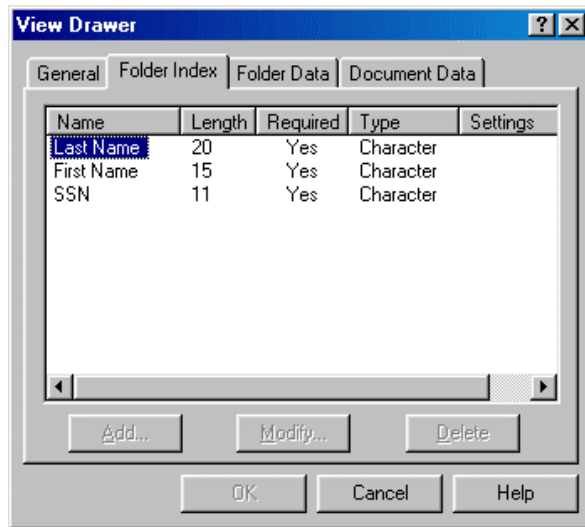
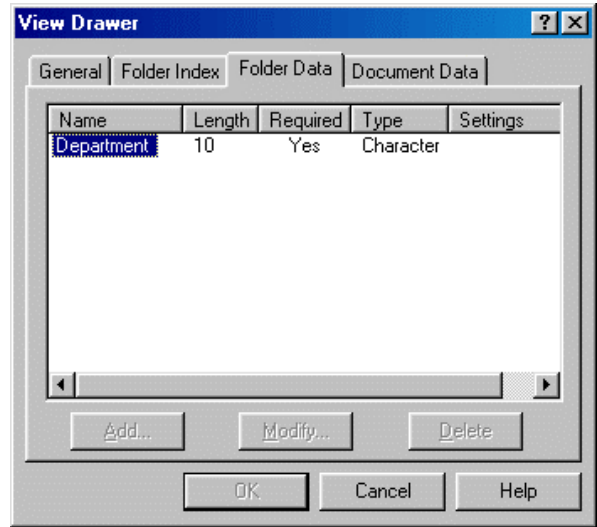
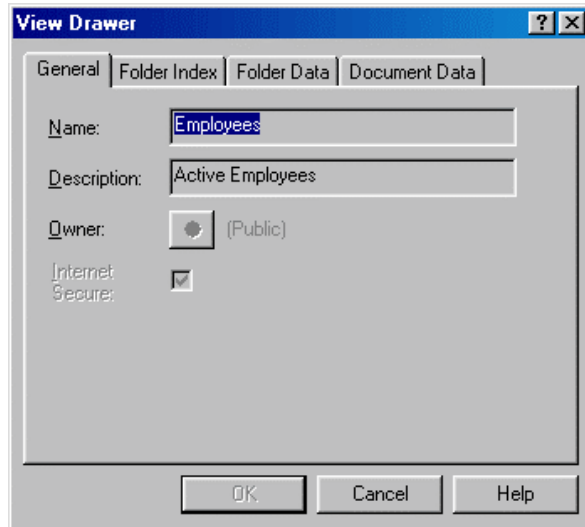
When the **Forced upon creation** radio button is selected, the owner will be automatically selected as the owner for the document. The user will not be able to change the owner field when this Document Type is specified. To change the owner during document creation, you would select another Document Type that does not have this restriction.

9. When you finish, click on **OK** then **Close** to return to the PaperClip32 window.

## Add a Drawer and Folder

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This exercise demonstrates how to add and set up a drawer. A drawer record, as shown below, is the *General* information, *Folder Index*, *Folder Data*, and *Document Data* that are stored for each drawer.



The following describes the information in a drawer record.

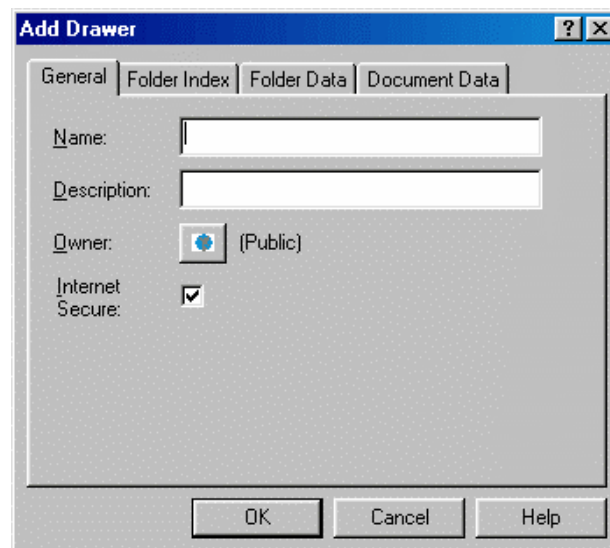
- Name The file drawer name.
- Description A brief, but meaningful, description that describes the function of the drawer to others.
- Owner The owner of the drawer.
- Internet Secure Indicates that the specified drawer is secure from access via the Internet using the PaperClip WebServer module. Note that the default setting for the **Internet Secure**: selection box is checked. If you are using WebServer and a browser to view documents and you want this drawer to be accessible by Internet users, uncheck this box.

Folder Index Fields	Folder index fields are defined when adding a file drawer. Later, when folders are added to the drawer, values for these fields may be entered manually or extracted automatically by the Visual Context Processor for drawers that have been clipped to an application.  You may define up to ten folder index fields, with a maximum total of 100 characters. At least one index field is required to define a drawer.
Folder Data Fields	These are user-defined fields that further identify folders. These fields are not used for indexing, but aid in searching. A total of ten folder data fields may be defined.
Document Data Fields	These fields help identify each document within a folder and provide the ability to search for specific groups of documents. Each document is labeled with at least three document data fields: document type, document description (optional), create date, and number of pages. Up to ten custom document data fields can be defined.

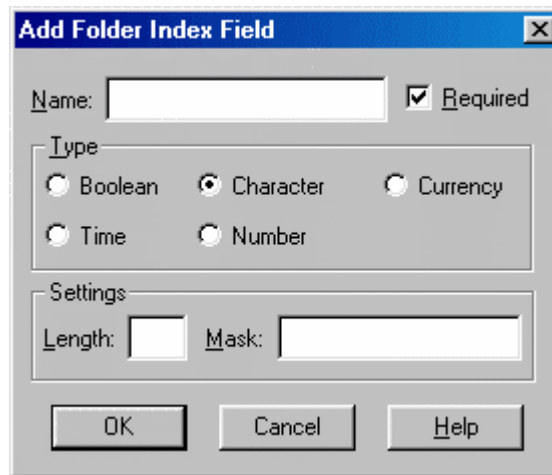
## Add a Drawer

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1. Select **Drawers** from the *Setup* menu. The *Drawer* dialog box appears.
2. Choose **Add**. The *Add Drawer* dialog box appears with the *General* tab controls shown.



3. Type a name for your file drawer and a brief description.
4. Select an owner for the drawer.
5. Click the *Folder Index* tab and choose **Add**. This displays the *Add Folder Index Field* dialog box.

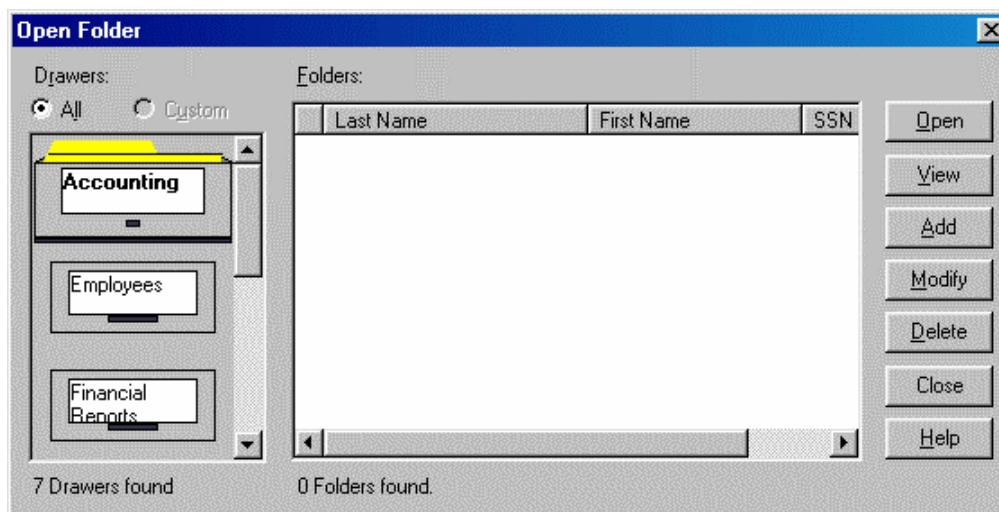


6. Type in the name of an index field, select a type, and in the *Settings* area enter a **Length**: and optional data field **Mask**:. For this exercise, enter First Name for **Name**:, select **Character**, a length of 15, and no Mask. Press OK and the *Add Drawer* dialog box displays, with the Folder Index tab showing the new index field. Add two additional index fields with the following attributes: Last Name – Character – 15 – no Mask and SSN – Character – 11 – ###-##-####.
7. The *Folder Data* and *Document Data* dialog boxes are accessed in the same manner but you can skip these for this exercise.
8. Click **OK** to create the drawer and return to the *Drawers* dialog box.
9. Click **Close** to return to the PaperClip32 desktop.

## Add a Folder

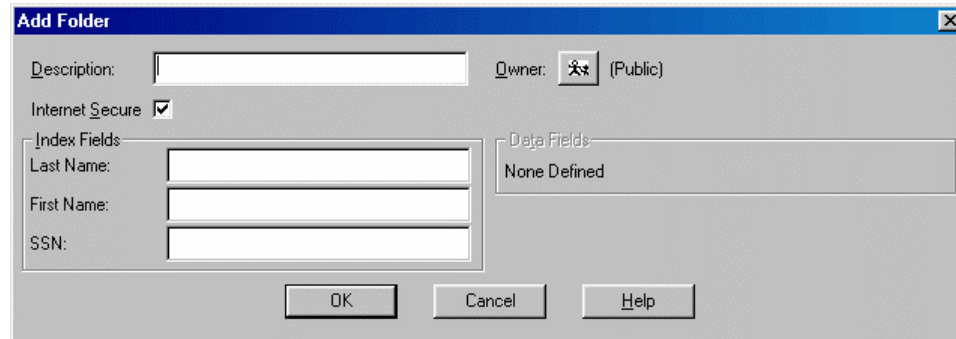
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There are two ways to add folders. You may add folders directly by clicking the **Add** button in the *Open Folder* dialog box shown below.



With this method, you enter the appropriate field values for each folder index field. You may also add folders automatically from within another application program by pressing the Visual Context Processor (VCP) hot key if your application has been Clipped to PaperClip32. For this exercise, we will add a folder using the **Add** button.

1. To add a Folder, select **Open Folder** from the *File* drop-down menu. The *Open Folder* dialog box appears.
2. Select the drawer you created. Note that the folders list box is empty and the message line at the bottom of the dialog box reads "0 Folders found."
3. Click **Add**. The *Add Folder* dialog box appears.




4. Enter a description for this folder.
5. To restrict access to this document, select an owner by pressing the **Owner** button and selecting an owner from the list in the *Owner Selection* dialog box. If you do not change the ownership, the document will inherit the ownership of the folder in which it is created.
6. Select an owner and choose **OK** to save the new owner name and continue processing or choose **Cancel** to return to the *Add Folder* dialog box without specifying a new owner.
7. Complete the folder index fields with values of your choosing.
8. Choose **OK**. The *Open Folder* dialog box reappears with the new folder in the *Folders:* list box.
9. Choose **Close** to accept the data and return to the desktop.

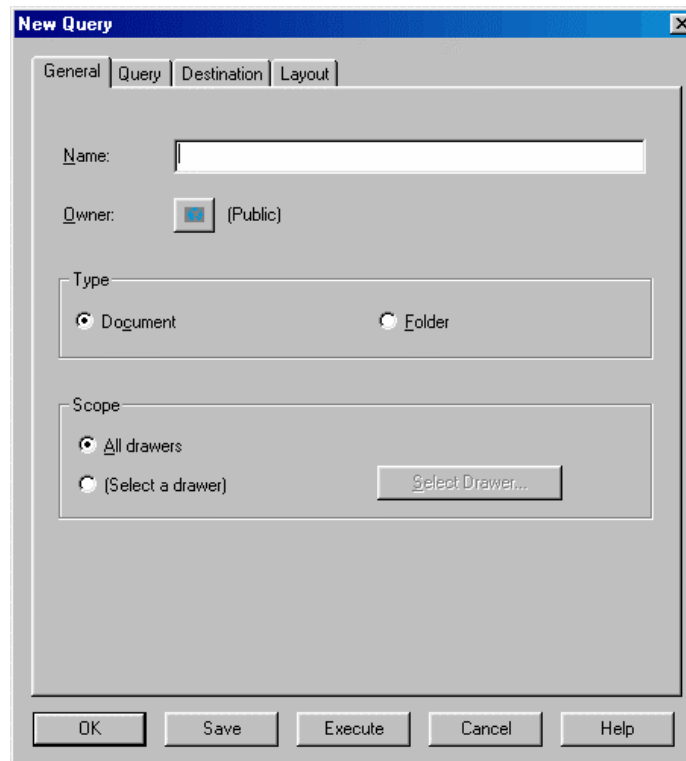
## Create a Query

---

Queries are created using the *New Query* dialog box. This dialog box contains control tabs to define the Query search criteria and function buttons for executing or saving your Queries.

1. To create a new Query, do one of the following:
  - Press the New Query toolbar button .
  - From the *File* pull down menu, choose **New Query**.
  - Press Cntl Q.

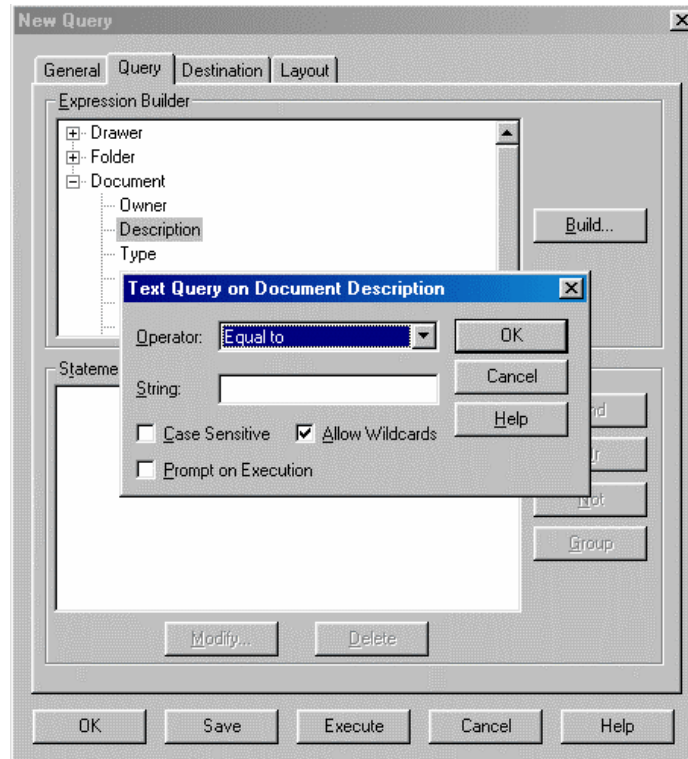
The *New Query* dialog box appears.



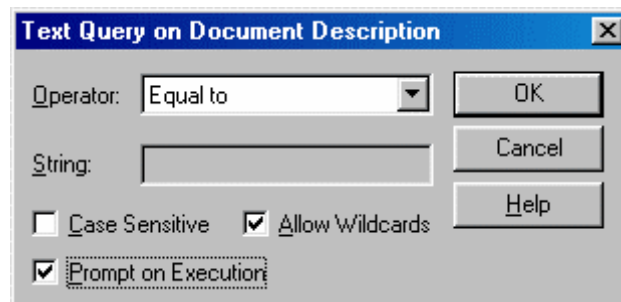
Use the *General* tab to specify the name, type, and scope of the Query. The *Query* tab is where you actually build the expressions used in your Queries and combines those expressions into more complex statements. The *Destination* tab is used to specify a destination for the Query results, as well as to define which batch operations, if any, to perform on those results. Finally, you use the *Layout* tab to layout the physical order of the fields within your Queries, to define the sort position of each field, as well as the order in which to sort the data within fields that appear in the columns in the Query Results window.

2. On the *General* tab type a name for the Query. This can be a long descriptive name up to 100 characters in length.
3. Select an owner for this Query.
4. In the *Type* group box you can select either **Document** or **Folder**, select **Document**.
5. In the *Scope* group box you can specify the scope of the Query you are creating, **All drawers** or a **(Select a drawer)**, select **All drawers**.

6. Select the *Query* tab to build your query.

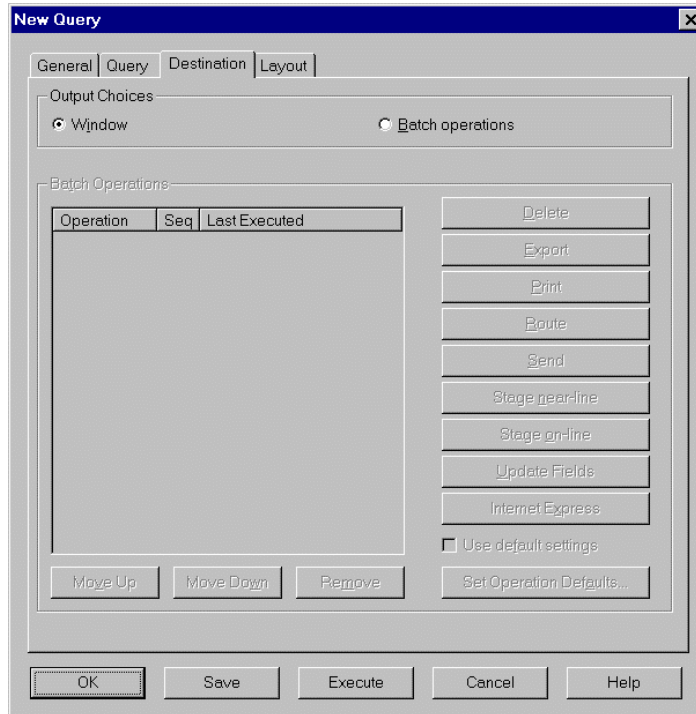


7. In the *Expression Builder* group box tree control, select the **Drawer**, **Folder**, or **Document** field for which you want to create an expression and select the **Build** button. In this exercise, click on the expander button for **Document**, highlight **Description**, and select the **Build** button.
8. The *Text Query on Document Description* dialog box opens.
9. Select **Prompt on Execution** as shown below.

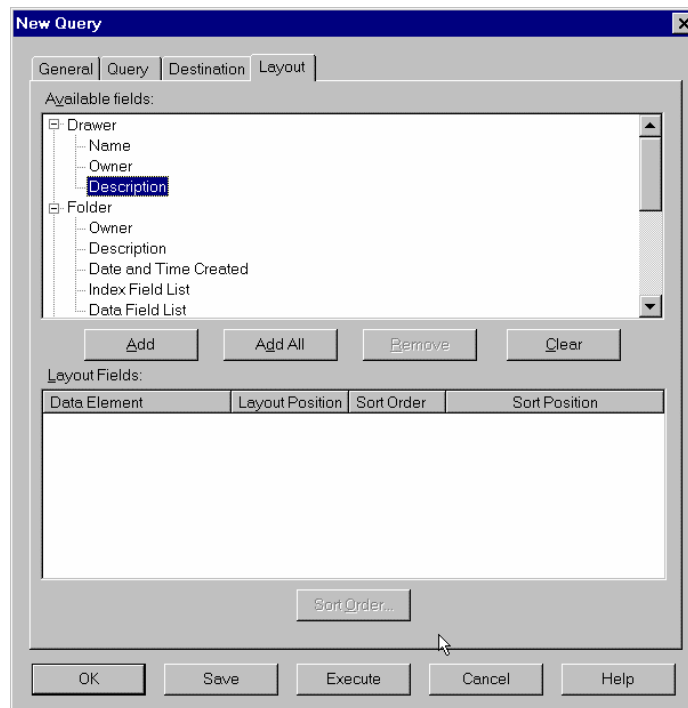


10. This selection will result in a prompt for a document description when the Query is executed.

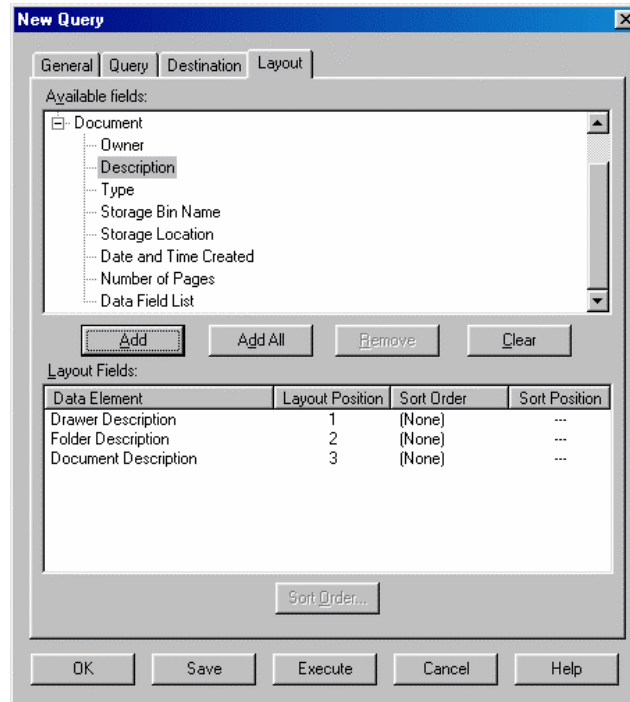
11. Select the *Destination* tab. You would select **Window** if you want the results of this query are to be displayed on the screen in the Query results window, or select **Batch operations** if you want an operation or operations specified in the *Batch Operations* group box (grayed out until you select **Batch operations**) to be executed on the documents or folders found as a result of the query. For this exercise, select **Window**.



12. Select the *Layout* tab.



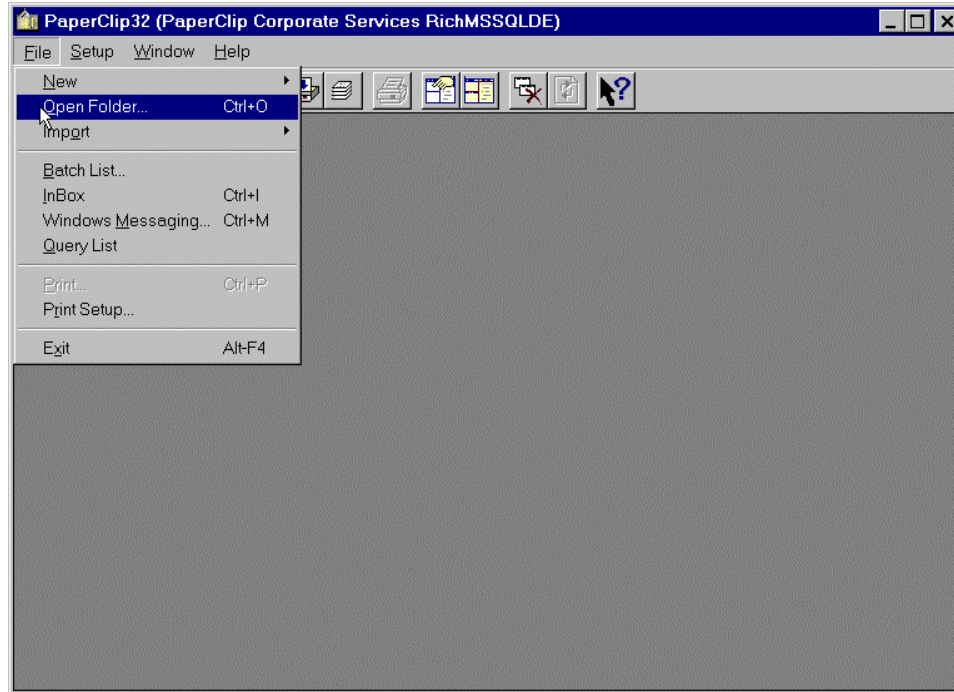
13. Click on the expander button for **Drawer**, highlight **Description**, and select the **Add** button. Do the same for **Folder** and **Document**. Your results will look like the following diagram.



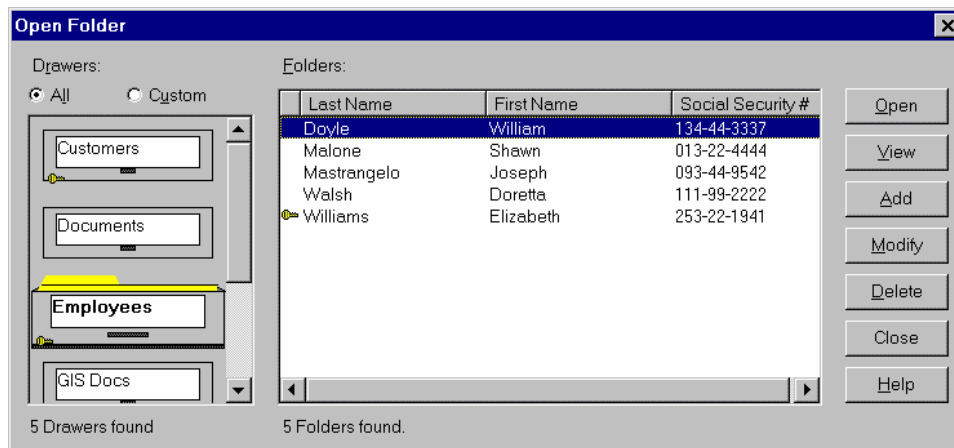
14. Select **Save** to save your Query.

## Open a Folder

If your business application or applications were Clipped to PaperClip32, you would press your user defined VCP hot key to open a folder (see the note about Clipping on page 4). In this exercise, you will open a folder from the main PaperClip32 desktop.



1. Select **Open Folder** from the *File* drop-down menu or press Ctrl O.
2. The *Open Folder* dialog box will appear.



3. Select the desired drawer and folder then select **Open**. The selected folder appears.

## Use Quick Folder to Find a Folder

---

Any time the *Open Folder* dialog box is open, the Quick Folder feature is automatically available for use. This feature lets you quickly find a specific folder, show a list of all existing folders, or quickly add a new folder to a drawer. Quick Folder is activated as soon as you type any characters when the focus is on the Folder List box. The *Quick Folder* dialog box appears with the characters you typed shown in the first folder index field. In order to select a specific existing folder, you must fill in all the required folder index fields exactly. If you want to retrieve a list of folders matching the characters you entered, type as many characters of the folder indices as you know. If you are adding a folder, select **Create Folder If New** to have PaperClip create a new folder with the specified index fields.

Once all the required fields are filled in, choose **OK** and one of the following actions will occur:

- If a folder exists matching the characters you entered, the folder is selected and the folder window displays a listing of all the documents in that folder.
- If there are two or more folders matching the characters you entered, they appear in the Folder List box.
- If the folder does not exist and **Create Folder If New** is selected, the system creates the new folder.
- If no folder(s) matching the characters you entered can be found and **Create Folder if New** is not selected, the systems prompts you to re-enter proper index information and returns you to the *Quick Folder* dialog box.

## Scan Documents into PaperClip32

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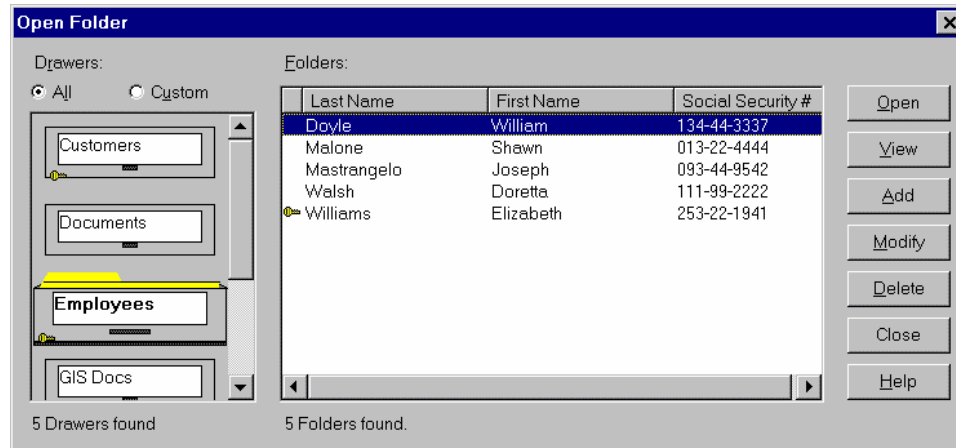
Imaged documents may be added to a folder in one of three ways; scanned, imported, or drag and dropped.

### Scan a Single Document

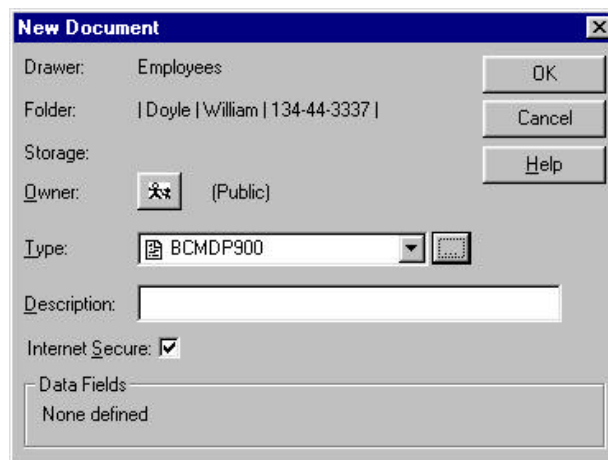
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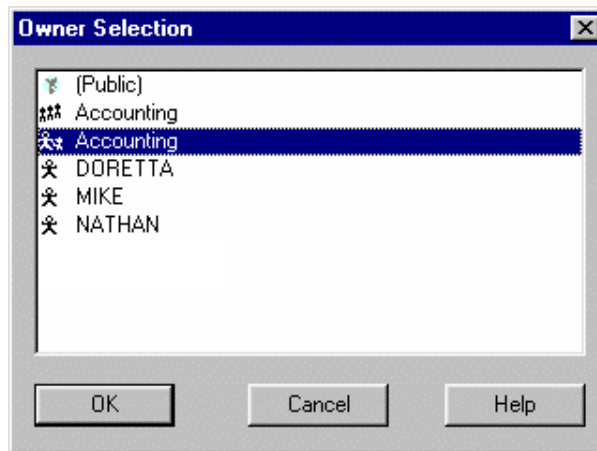
3. Select **Open Folder** from the *File* drop-down menu.
4. The *Open Folder* dialog box will appear.




3. Select the drawer and folder into which you want to scan a document then select **Open**. The selected folder appears.
4. To scan a document, select **New** from the *Document* menu, press Ctrl N, or click on the New Document icon. The *New Document* dialog box appears.



5. To restrict access to this document, select an owner by pressing the Owner button and selecting an owner from the list in the *Owner Selection* dialog box. If you do not change the ownership, the document will inherit the ownership of the folder in which it is created.




---

**Note:** The default PaperClip32 owner is called Use Parent. The icon is a parent holding a child's hand . If you assign this ownership to the document, the document will inherit the same ownership as the folder in which the document is contained. If the ownership of the folder changes, the ownership of the document will change.

---

6. Select the appropriate document type from the drop-down list box. In this exercise, select the document type, Invoice, defined in the Administrative Tasks section of this document. If you have not defined this client type, select any PaperClip32 Image Document document type.

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**Note:** Users with Supervisor privilege will see the Add Document Type button  to the right of the document type drop-down list box. You would select this button to define a new document type.

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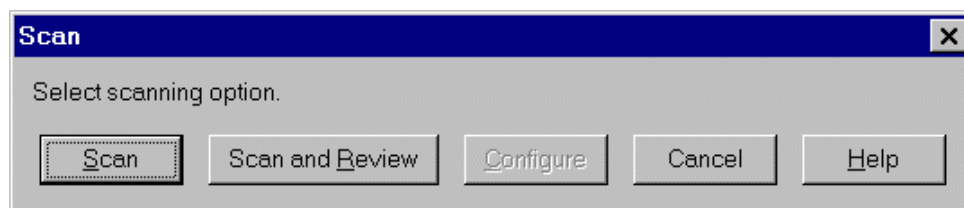
7. Enter an optional description to further identify the document. This will help to identify the document in the folder window, and in the title bar of the viewer window.

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**Note:** It is highly recommended that you enter a description for all imaged documents. The description helps you identify the document later.

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8. Click on **OK**.
9. PaperClip32 displays the *Scan* dialog box, prompting you, "Select scanning option."



10. Place your page on the scanner bed, or place the page(s) in the automatic feed tray, and click on the **Scan** button. If you prefer to review the scanned pages after they are scanned, click on the **Scan and Review** button instead. If your scanner is not configured, you must click on the **Configure** button before you start the scan. For further information, see Scanner Configuration in the *PaperClip32 User Guide*.


11. If your scanner has an automatic document feed, PaperClip32 displays the PaperClip32 document scanner window while it scans. You may click on the **Cancel** button to abort the scan at any time it is in progress.
12. With a flatbed scanner, the message displays: "Please open scanner flatbed and place document face down. Press <OK> to continue." Click on the **OK** button. PaperClip32 displays the PaperClip32 document scanner window while it scans. Click on the **Cancel** button to abort the scan in progress.
13. If you are using a flatbed scanner, when prompted to "Scan another page?", insert the next page and click on the **Yes** button, or click on the **No** button to stop scanning and store the document (or to review before storing, if that is the option you chose).
14. Once the document has been stored, PaperClip32 displays the new document at the top of the folder window's list of documents. Documents are sorted in date order, with the most recently created document at the top of the folder.

## Scan a Batch

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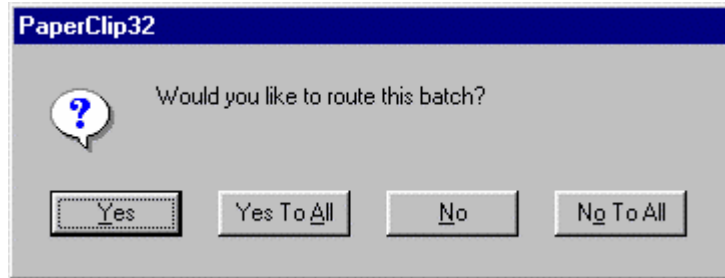
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Image pages may be scanned into an interim type of storage, called a batch. Batched images are held in the Batch List until assembled into documents and filed into folders (indexed) at a later time.

1. Select **New, Batch** from the *File* menu or select the Batch icon  from the tool bar.
2. PaperClip32 displays the *Scan* dialog box, prompting you, "Select scanning option."
3. Place your page on the scanner bed, or place the page(s) in the automatic feed tray, and click on the **Scan** button. If you prefer to review the scanned pages after they are scanned, click on the **Scan and Review** button instead. If your scanner is not configured, you must click on the **Configure** button before you start the scan. For further information, see Scanner Configuration in the *PaperClip32 User Guide*.
4. If your scanner has an automatic document feed, PaperClip32 displays the PaperClip32 document scanner window while it scans. You may click on the **Cancel** button to abort the scan at any time it is in progress.
5. With a flatbed scanner, the message displays: "Please open scanner flatbed and place document face down. Press <OK> to continue." Click on the **OK** button. PaperClip32 displays the PaperClip32 document scanner window while it scans. Click on the **Cancel** button to abort the scan in progress.
6. If you are using a flatbed scanner, when prompted to "Scan another page?", insert the next page and click on the **Yes** button, or click on the **No** button to stop scanning and store the document (or to review before storing, if that is the option you chose).
7. To review the scanned batch at this point, click on **Yes**. PaperClip32 displays the *Review Scanned Batch* dialog box. If you want to view the batch at a later time, click on **No**. The *Scan Batch* dialog box will appear.
8. You can tag the batch with optional **Note** and **Batch ID** fields. PaperClip32 does not need these fields to reference the batch; it uses date and time fields. These optional

tags may be useful to you later to identify one of several batches from a log of scanned batches.

9. Enter an optional **Note** (up to 40 characters) to append to this batch.
10. Enter an optional eight-character **Batch ID** for this batch. (Example: InsDocs)
11. Click on the **OK** button to store the batch.
12. If you have Routing privileges, the Route Batch dialog box opens.



You can select from the following options

- |            |  |
|------------|--|
| Yes        | This indicates that you want to Route this batch. This dialog box will appear for each subsequent batch. Once you click on Yes, the New Package dialog box will appear.                                      |
| Yes to All | This indicates that you want to Route all of the batches you scan. This dialog box will not appear again until you start a new session. Once you click on Yes to All the New Package dialog box will appear. |
| No         | This indicates that you do not want to Route this batch. This dialog box will appear for each subsequent batch you scan.   |
| No to All  | This indicates that you do not want to Route any batches that you scan. The dialog box will not appear again until you start a new session.  |

## Index a Batch




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After a batch has been scanned or imported, it may be indexed. Batch indexing requires two steps. First, the pages within the batch are assembled into one or more documents. Second, the new documents are assigned to folders.

### Assemble the Document for Indexing

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1. Select **Batch List** from the *File* menu or select the Batch List icon  on the tool bar. The *Batch List* window appears displaying the list of batches to be indexed.
2. Select the batch to be indexed.
3. Click **Index**. The *Batch:* window will appear, displaying the first image in the selected batch. (If necessary, maximize the *Batch:* window to view all options.)
4. The image can be manipulated using any of the image manipulation features on the tool bar or by placing your cursor on the document displayed, pressing the right mouse button and selecting an image manipulation feature.
5. Select a page number in the Batch box to inspect a particular page of the batch.
6. If you decide that the page in the viewer belongs in the document you are currently assembling, click on the add button . (If you wish to assign all pages in this batch to the document, click on the all button .)

### Index the Document after Assembly

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1. Click on the **Create Document** button when you have selected all the pages that belong in the document you wish to create.

When you click on **Create Document** and you have not already selected a folder, either by Clipping (see note below) or by pressing the **Select Folder** button in the Batch window, the *Select Folder for Batch Indexing Documents* dialog box is displayed. Select the destination drawer. Select the destination folder by double-clicking on it or by highlighting it and clicking **Select**. To create a new folder for the document, click on the **Add** button, enter the necessary data, click on **OK**, and select the new folder when it appears on the list.

---

**Note:** When the *Batch:* window is open and you hot key from a Clipped application, the clipped folder becomes the selected one for indexing. The folder does not open on your desktop.

---

2. If you have already selected a folder by either clicking on the **Select Folder** button or hot keying from a Clipped application and you now click on the **Create Document** button, the Folder Selection Options dialog box appears. This dialog box allows you to control the folder to be used and the appearance of the Folder Selection Options dialog box. The following describes the Folder Selection Options dialog box button

selections, and the consequences of selecting each button for the indicated dialog box. A check indicates that the dialog box will be displayed

- |            |  |
|------------|--|
| Yes        | This indicates that you want to use the currently selected folder to store this document. This dialog box will appear for each subsequent document, unless the batch is closed and reopened or another option is selected. Once you click on Yes, the New Document dialog box will appear.                                   |
| Yes to All | This indicates that you want to use the currently selected folder to store all the documents in the batch. This dialog box will not appear again, unless the batch is closed and reopened. Once you click on Yes to All the New Document dialog box will appear.   |
| No         | This indicates that you want to select a new folder in which to store this document. This dialog box will appear for each subsequent batch unless the batch is closed and reopened or another option is selected. Once you click on No, the Folder Selection dialog box will appear followed by the New Document dialog box. |
| No to All  | This indicates that you want to select the folder for each document. The dialog box will not appear again, unless the batch is closed and reopened. The Folder Selection dialog box will always appear before the New Document dialog box.   |

3. Once a folder has been selected, the *New Document* dialog box will appear.
4. Enter an owner, type, and description.

The *New Document* dialog box will remember the last document type used, and will position the **Type**: drop-down list selection on that document type when the list appears. For example, if you are indexing a group of invoices and you select Invoice as the document type, the next time the *New Document* dialog box appears the document type will default to Invoice. This will only happen for the current session of PaperClip32.

5. Click on **OK**. PaperClip32 creates a document from the selected pages and places it in the folder.
6. Once a document has been indexed, the Page Deletion Options dialog box appears. This dialog box allows you to control two things: deletion of indexed pages and the appearance of the Page Deletion Options dialog box.
7. Select a page deletion option:

- |            |   |
|------------|---|
| Yes        | This indicates that you want to delete the pages after this document is indexed. This dialog box will appear for each subsequent document, unless the batch is closed and reopened or another option is selected. |
| Yes to All | This indicates that you want to delete the pages each time a document is indexed. This dialog box will not appear again, unless the batch is closed and reopened  |

No This indicates that you do not want to delete the pages after this document is indexed. This dialog box will appear for each subsequent batch unless the batch is closed and reopened or another option is selected.

No to All This indicates that you do not want to delete the pages after any documents are indexed. The dialog box will not appear again, unless the batch is closed and reopened.

8. The Assemble Document window reappears. Repeat this procedure until there are no more pages in the batch.
9. When there are no more pages to be indexed, click on the X button in the top right of the window to close the batch-indexing window.

## Import an Imaged Document

---

To import an imaged document to PaperClip32, do the following.

1. Open the appropriate folder from the *Open Folder* dialog box.
2. Select **Import** from the *Document* menu. The *New Document* dialog box will appear.
3. To assign ownership to this document, select an owner from the drop-down list.
4. Select a PaperClip32 Image Document type.
5. Enter an optional description for the document.
6. Click on the **OK** button. The *Import File(s)* dialog box will appear.



7. Use the dialog box to find the correct drive, directory and file. When the correct image file(s) appear in the **File Name:** field, click on the **Open** button.
8. To select multiple image files to be part of the same imaged document, click on the left mouse button at each image file, while holding down the Ctrl key.
9. PaperClip32 imports the file(s) and updates the folder window to include the new document.

---

**Note:** Importing can also be accomplished via the File/Import menu section or via drag and drop from Explorer.

---

## Working with SoftClip Documents

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SoftClip documents can be added to a folder in three ways; selecting New Document, imported, or drag and dropped.

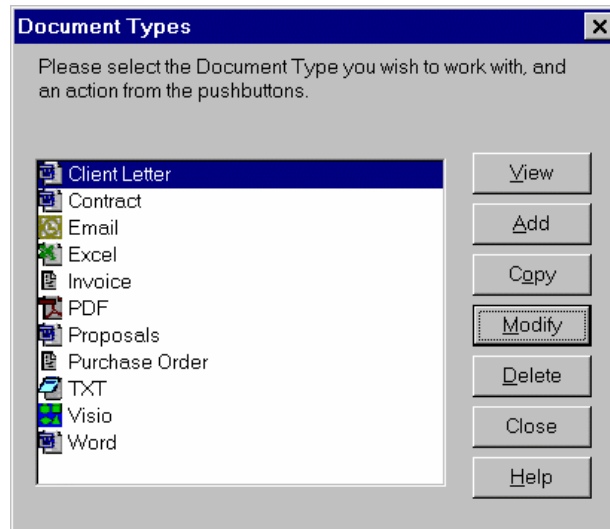
### Creating and Adding a SoftClip Document

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---

You can create and add a SoftClip document to the folder using the **New Document** command on the *File* menu.

1. Open the appropriate folder from the *Open Folder* dialog box. The folder window will appear.
2. Select **New** from the *Document* menu, or click on the New Document icon. The *New Document* dialog box will appear.
3. To restrict access to this document, select an owner from the drop-down list.
4. Select the appropriate SoftClip document type. In this exercise, select the document type, Client Letters, defined in the Administrative Tasks section of this document. If you have not defined this client type, select any Word document type.



5. Enter an optional description for the document. This helps to identify the document in the folder window.
6. Click on the **OK** button.

---

**Note:** The remaining steps are dependent upon the setting of the SoftClip File Options in the System Parameters record.

---

Your system was set up to store SoftClip files by one of the following three methods.

Never Store SoftClips to Bins	The user assigns the name and storage location for each document. PaperClip32 stores the document in the selected folder. Any changes made to the document, independently of PaperClip32, will be reflected when the document is retrieved through PaperClip32.
Always Store SoftClip to Bins	PaperClip32 automatically names and stores the file in the appropriate storage bin. Any changes made to the document, independently of PaperClip32, will not be reflected when the document is retrieved through PaperClip32.
<hr/> <b>Note:</b> When Always Store SoftClip to Bins is selected no additional dialog box will appear. <hr/>	
Prompt	Allows the user to select the SoftClip storage option for each document, individually.

For further information, refer to Setup System Parameters in the *PaperClip32 User Guide*.

### ***If Never Store SoftClips to Bins, was Selected***

---

1. PaperClip32 displays the *Choose File Name for New SoftClip Document* dialog box:



2. Type in the File Name and click on **Save**.
3. PaperClip32 launches the application and displays a new document.
4. Create the new document, save it and exit from the application to return to the PaperClip32 folder window.
5. The updated folder window will appear, with the new SoftClip document at the top.

### ***If Always Store SoftClips to Bins, was Selected***

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1. PaperClip32 launches the SoftClip application and displays a new document.
2. Create the new document.

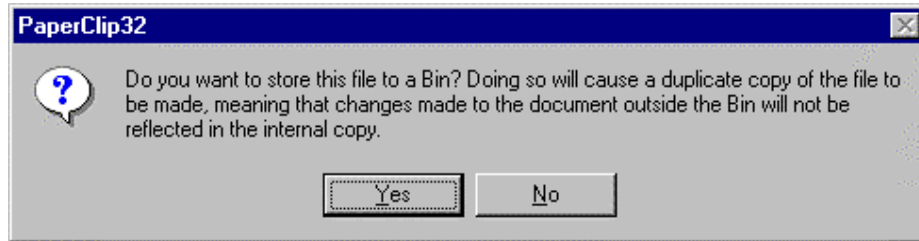
3. Save the file and exit from your application without changing the file name. PaperClip32 saves the file automatically assigning its own file name (e.g., 48.DOC). PaperClip32 displays the updated folder window, with the new SoftClip document at the top.

### **If Prompt to Store SoftClips to Bins, was Selected**

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1. PaperClip32 displays the following message:



- Click on **Yes** to have PaperClip32 name and store the file in the default bin.
- Click on **No** to select a directory.

### **Import a SoftClip Document**

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If you select the Import command, PaperClip32 will allow you to bring a pre-existing software file into the folder.

---

**Note:** Before you import a SoftClip document, a document type must be defined for the desired software.

---

1. Open the appropriate folder from the *New Folder* dialog box. The folder window will appear.
2. Select **Import** from the *Document* menu. The *New Document* dialog box will appear.
3. To assign ownership to this document, select the owner from the drop-down list.
4. Select the appropriate SoftClip document type.
5. Enter a description for the document. This helps identify the document in the folder window.
6. Click on the **OK** button.

---

**Note:** Importing can also be accomplished via the File/Import menu section or via drag and drop from Explorer.

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## Execute a Saved Query

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You can execute a Query that you see in the Query List window. Before the Query is run, the system checks that you have the proper user privileges to run it.

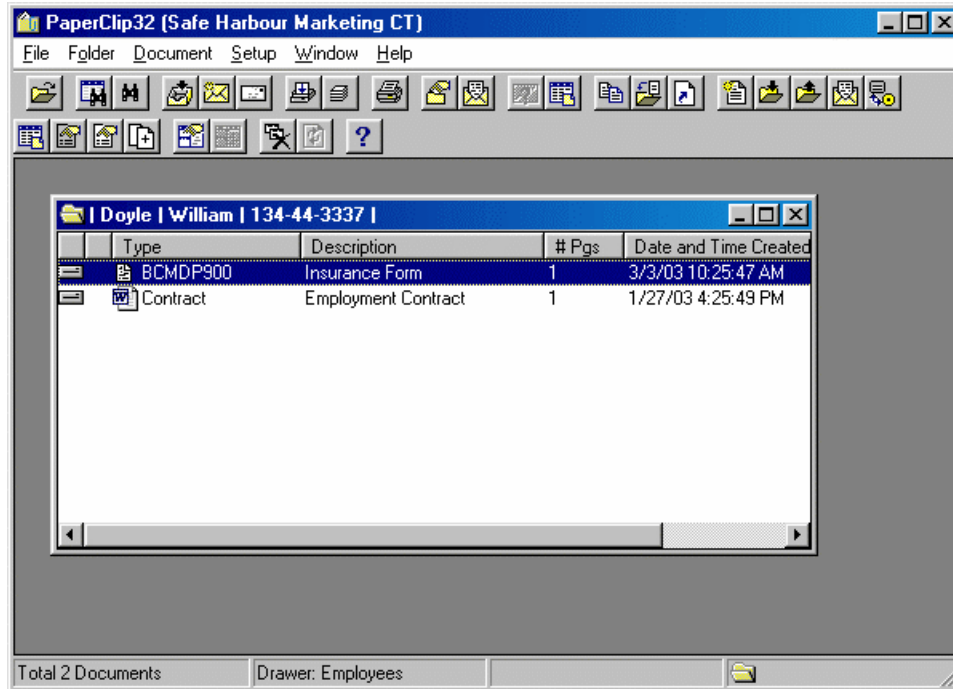
1. Choose Query List from the File pull down menu. The Query List window appears showing you any existing queries to which you may have access.
2. If you want to execute an existing Query, select it in the Query List window and choose **Execute** from the *Query* pull down menu or, optionally, use the right mouse button to select **Execute** from the pop-up menu. The system executes the Query using the saved search criteria and displays the results or, if the destination selected is Batch Operations, those operations will be executed.

## Route a Document

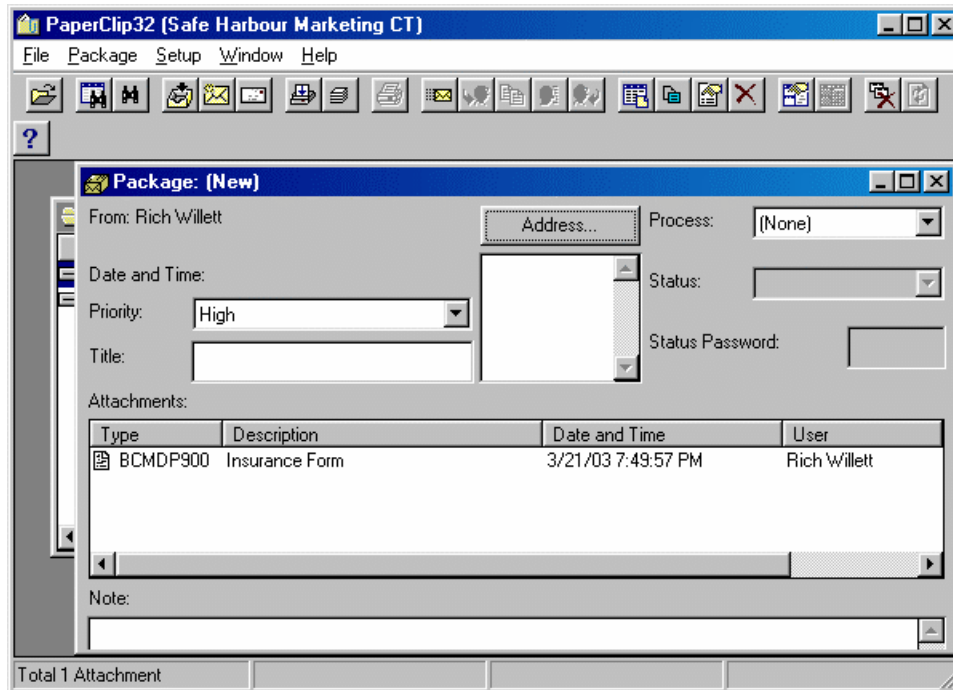
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You can route any PaperClip32 document to a user's InBox.

1. Open the folder from which you wish to route a document.
2. Select the document.

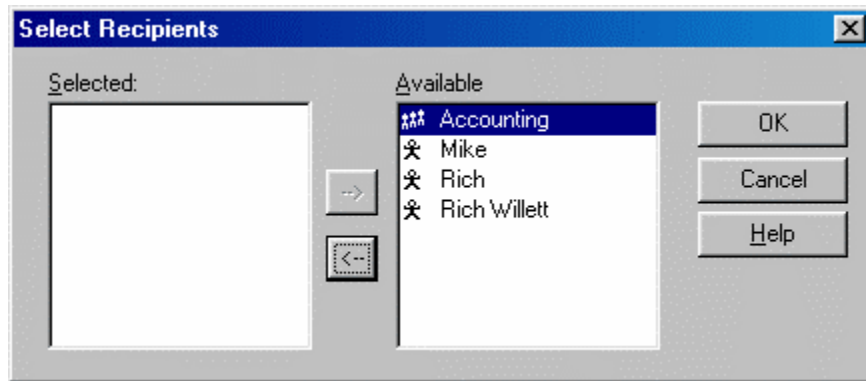


3. Select **Route** from the *Document* menu. The *Package (New)* dialog box displays.



4. Leave the priority for this routed package as the default of High.

5. Enter the optional title, which identifies a routed package in the recipient's InBox.
6. Click the **Address** command button. The *Select Recipients* dialog displays.



7. Select a recipient from the *Available* list, and then click the left arrow icon. The name moves to the *Selected:* list.
8. Click **OK**. The *Package (New)* dialog displays. The name you selected appears in the address list.
9. Click the right mouse button while your cursor is in the *Package (New)* dialog box and select **Send** in the drop-down menu.
10. Check with the recipient to verify they received the package.