



FIS Image and Document Management System

# DocFinity v10 Basics

Guide to Menus, Workspace and Panels

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# Access to Images and Application Functions

## Groups:

- All PSU users are assigned to Groups in DocFinity Version 10.
- The rights and features assigned to the Group controls the access of the users in the group. Requests for additional access are sent to DocFinity support using the Access Request button on the DocFinity web site at: [www.controller.psu.edu/divisions/docfinity](http://www.controller.psu.edu/divisions/docfinity).

## Requests for Access to Additional Image Types or Application Functions:

- Requests for access are sent to PSU Docfinity Support
- The Access Request form is accessed on the DocFinity web site at: [www.controller.psu.edu/divisions/docfinity](http://www.controller.psu.edu/divisions/docfinity) .
- Click the **Access Request** button.

## Log In and Security for PSU Users

### DocFinity Web Site:

Application log in is accessed on Corporate Controller web site. PSU Web Access provides security to the application.

### Logging In:

- Web site is: [www.controller.psu.edu/division/docfinity](http://www.controller.psu.edu/division/docfinity)
- Click **Log In**.



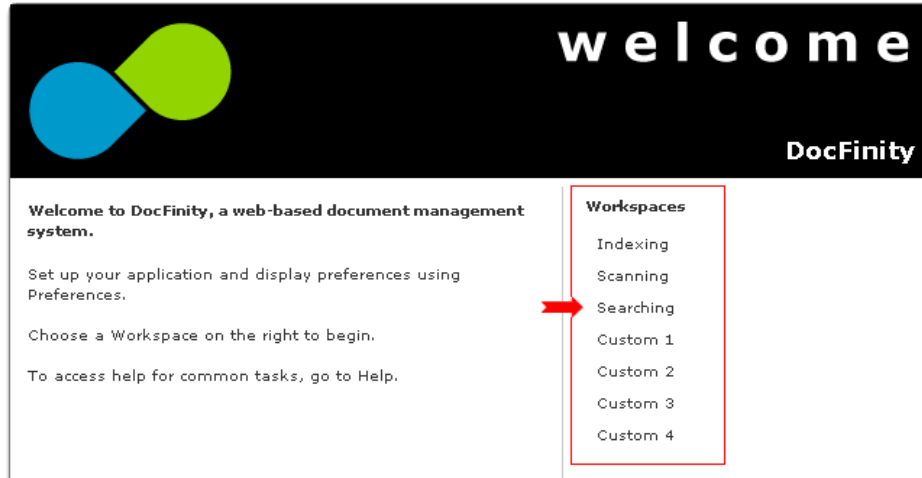
- Enter PSU Web Access credentials.

## DocFinity Welcome Screen:

This optional tool was developed to make getting started easy.

### Welcome screen:

- Select Workspace to begin working.

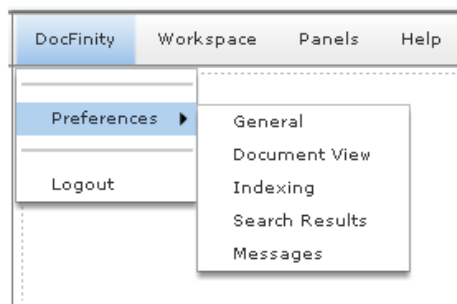


- The custom workspaces can be set up using the instructions on the Help Menu if desired.

## DocFinity v10 Menus

### DocFinity Menu:

- Preferences can be set for actions and panel displays.
- Logout command can be used or browser tab can be closed to end session.



### Preferences:

Default settings have been set for all PSU users efficient use of the system. Experienced users may want to experiment with different options.

### Preference Tabs:

- General
- Document View
- Indexing (will only be available for users with indexing rights)
- Search Results

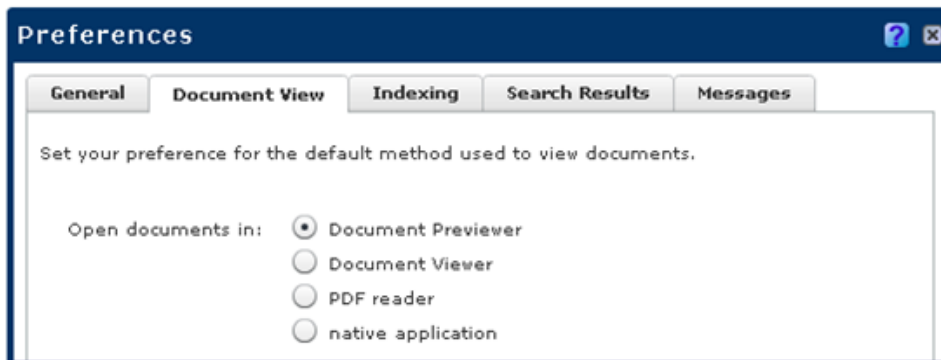
## General Preferences

Checkbox for Descriptions Text will display descriptors under each title bar for Workspaces and Panels. Descriptors are turned on by default. Uncheck display checkbox to turn off.



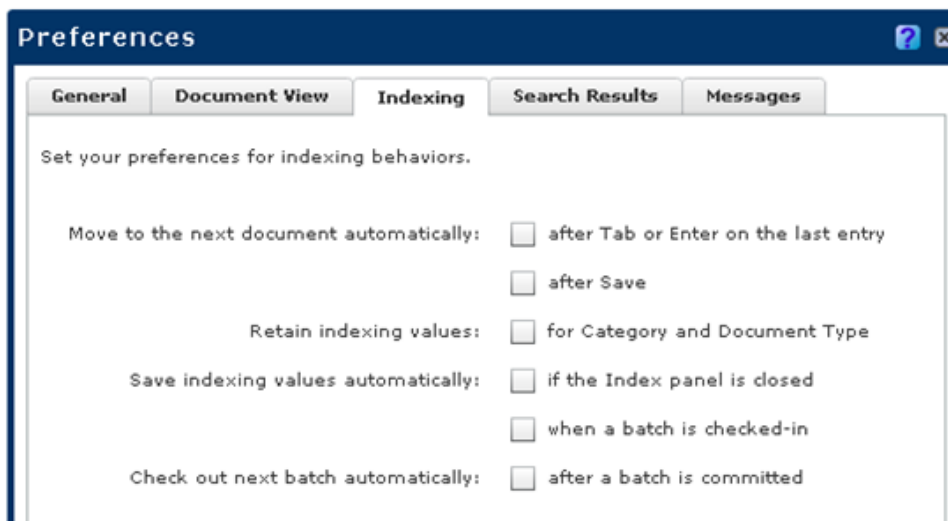
## Document View Preferences

Set viewer option for all images. Selection will be the default for displaying selected images.



## Indexing Preferences

Set preferences for indexing behaviors. By default none are selected.



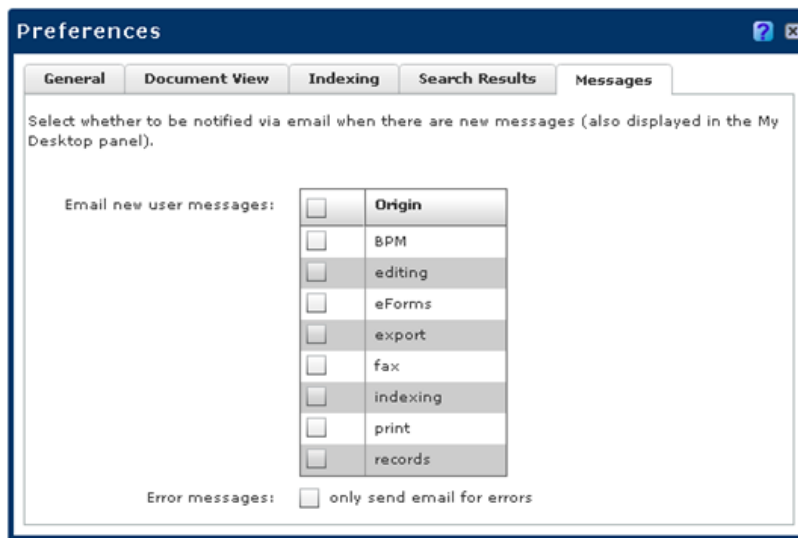
## Search Results Preferences

One additional column can be added to the Search Results display. Useful if Pointers and Diary entries are added to images and documents. PSU users will have the feature rights to add pointers when indexing. Displaying the column is turned on by default. Can be turned off by unchecking the checkbox.



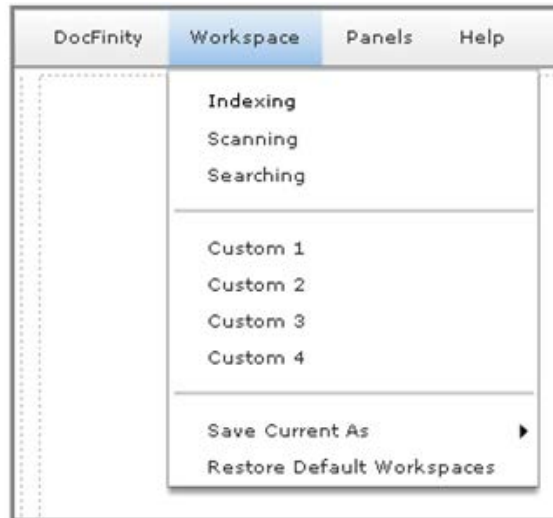
## Messages Preferences

The only selection that is related to PSU users is the Indexing option.



## Workspace Menu:

- A Workspace is a set of panels that open by default.
- Users can add or remove panels once workspace is opened.
- Changes to layout can be saved using the "**Save as Current**" selection.
- "**Restore Default Workspaces**" will return workspaces to default layout of panels.
- Must have user rights to a workspace to have it included in the Workspace list.
- Custom workspaces can be set up by users. Help Menu has instructions.
- See screen shot below.




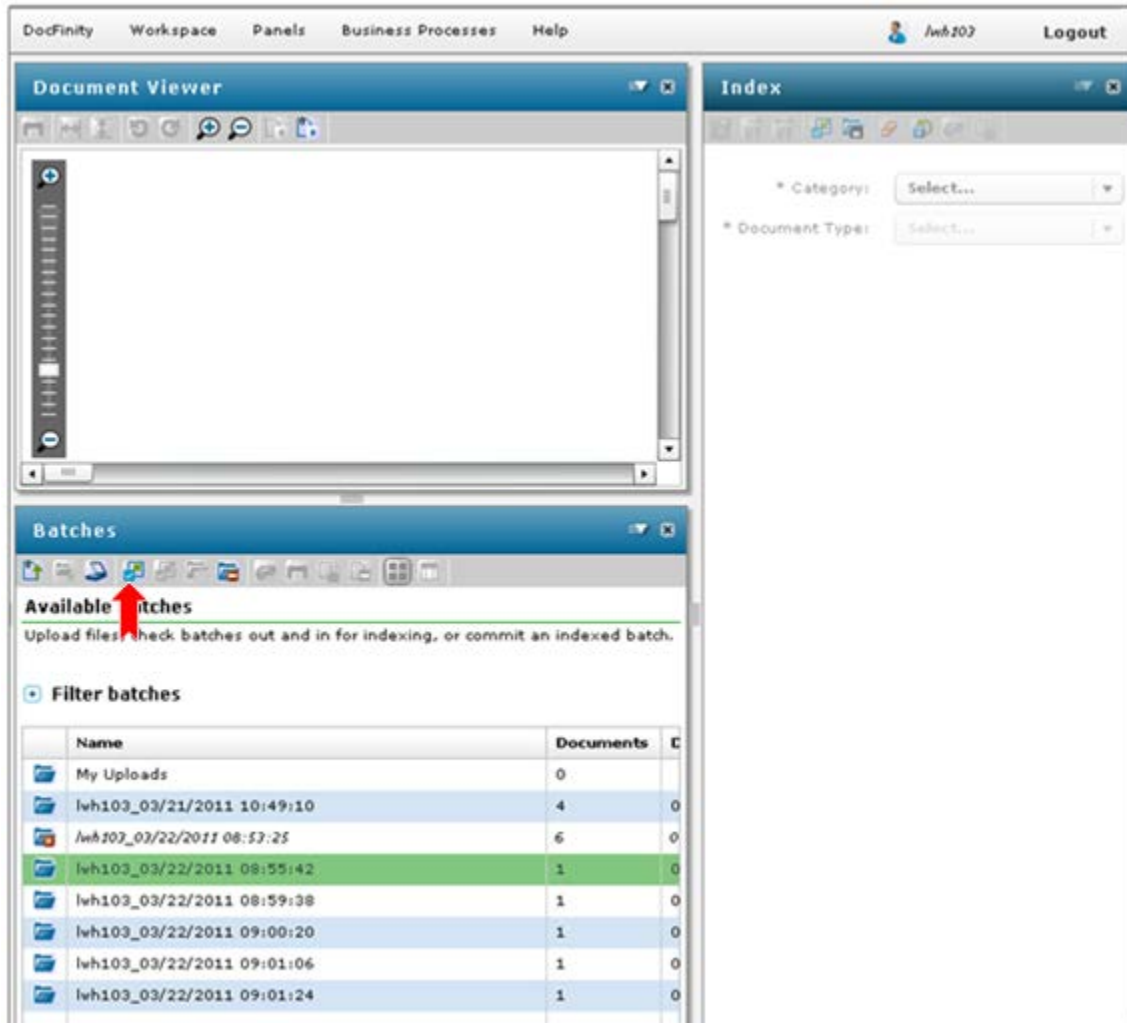
## Indexing Workspace:

- Includes panels for: Batches, Document Viewer and Indexing.
- Can resize, move or close each panel.
- Each has drop down menu and button bar.
- See screen shot below.



**To begin indexing:**

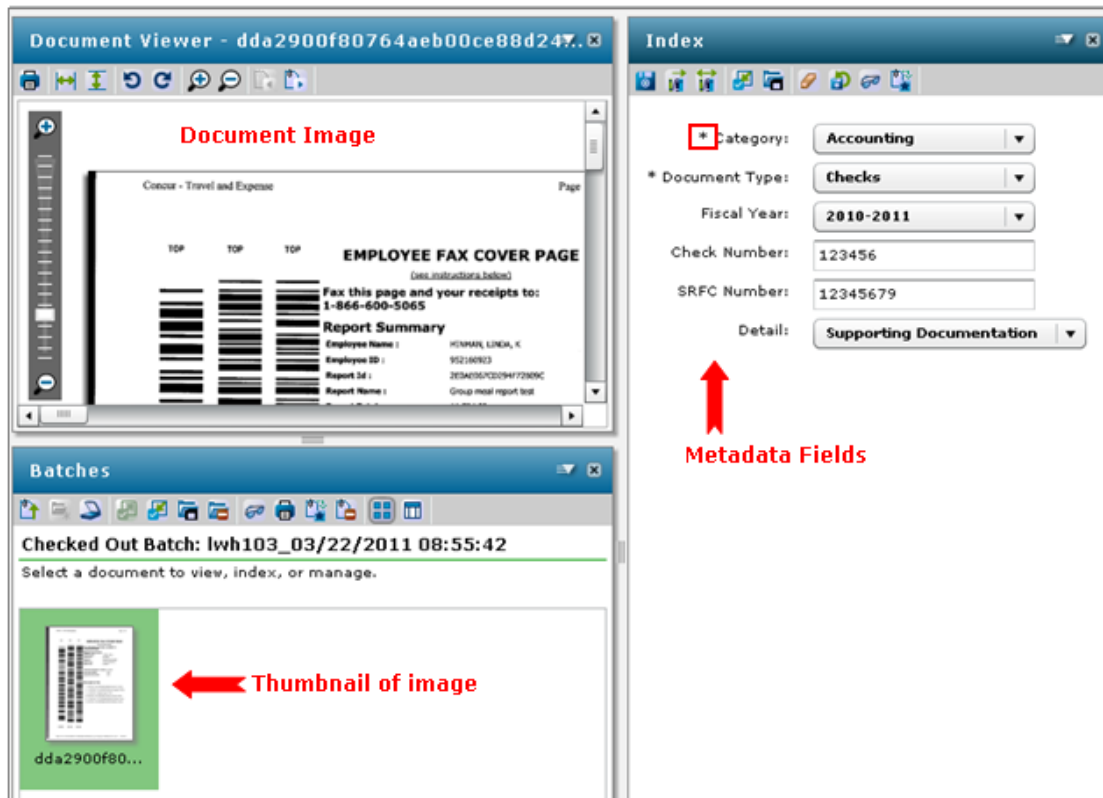
- Unindexed batches of scanned or uploaded images and documents are displayed in the **Batches** panel.
- Batches are selected and the **Check Out** button  used to check out the batch for indexing.
- See screen shot below.





## Checked-Out Batches are ready for indexing:

- **Batch Panel** display changes to display of thumbnails of images in batch. See screen shot below.
- First image in batch will display in **Document Viewer** where it can be edited if needed.
- Any image in batch can be selected to be opened in Document Viewer.
- **Index** panel contains metadata fields to complete.
- Required metadata fields have an \* to the left of the field name.
- See screen shot below.



## Scanning Workspace

- Includes panel for scanning. See screen shot below.
- Panel has selections for scanning options.
- **Scan Configuration** section sets up scan. User makes selections.
- **Scanning Profile** is set up by Administrators. It controls single page or multi-page scanning, which scanner is to be used, etc. New Scan Profiles can be set up when needed. Contact Help Desk.
- **Scan Progress** displays images as scanned allowing for quick quality check.
- Images can be manipulated if needed with buttons or Panel menu.
- Images are saved into **Batches**.
- **Batch Properties**: Access to Batch is given prior to scanning for each group that needs access to the batch for indexing.
- Refer to **Scanning Images** documentation for more details on the scanning process.
- See screen shot below.



## Searching Workspace

- Includes Panels for: Search, Document Viewer and Search Results.
- Can resize, move or close each.
- Each panel has drop down menu and button bar.

## Search Panel:

- Search is selected from drop down list of searches. See screen shot below.
- Criteria are selected or entered in available fields to be searched for.
- Custom searches can be created. Contact help desk with requests.

### Search Results Panel:

- Documents matching the selected criteria display in the **Search Results** panel. See screen shot below.
- Documents can be viewed in the Document Viewer, printed, e-mailed, downloaded, annotated or reindexed.

The screenshot shows the DocFinity interface with three main panels:

- Search Panel:** Contains search criteria: Fiscal Year (10/11) and Check Number (4747252). A red arrow points to the search criteria, and another red arrow points to the search button.
- Document Viewer Panel:** Displays a document titled "Document Viewer - 17187372.tif - page 1 [ read only ]". The document content is a remittance advice for HETSKO dated 04/13/2011, with a net amount of \$262.00. A red arrow points from the search criteria to the document viewer.
- Search Results Panel:** Displays a table of search results. A red arrow points to the selected document (Check Number 4841916).

Annotations in red text:

- "Documents from Fiscal Year 2010-2011 with check number entered" (with a bracket pointing to the search criteria)
- "Document selected and displaying in Document Viewer" (with an arrow pointing to the selected document in the Search Results table)

Document Type	Fiscal Year	Check Number	File Type
Check	10/11	4747252	Document
Check	10/11	4747254	Document
Check	10/11	4841913	Document
Check	10/11	4747256	Document
Check	10/11	4841916	Document

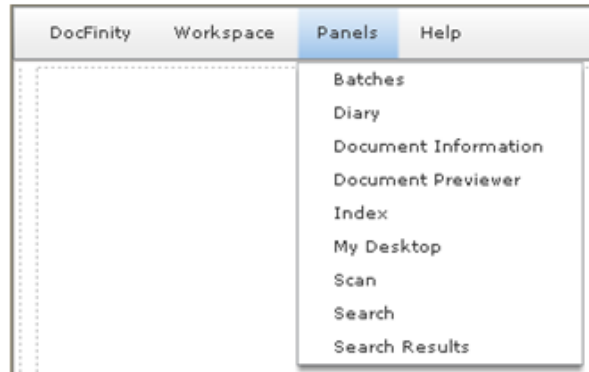
\* Search results exceed limit; all data is not visible \* **Total Results: > 2000**

### Document Viewer Panel

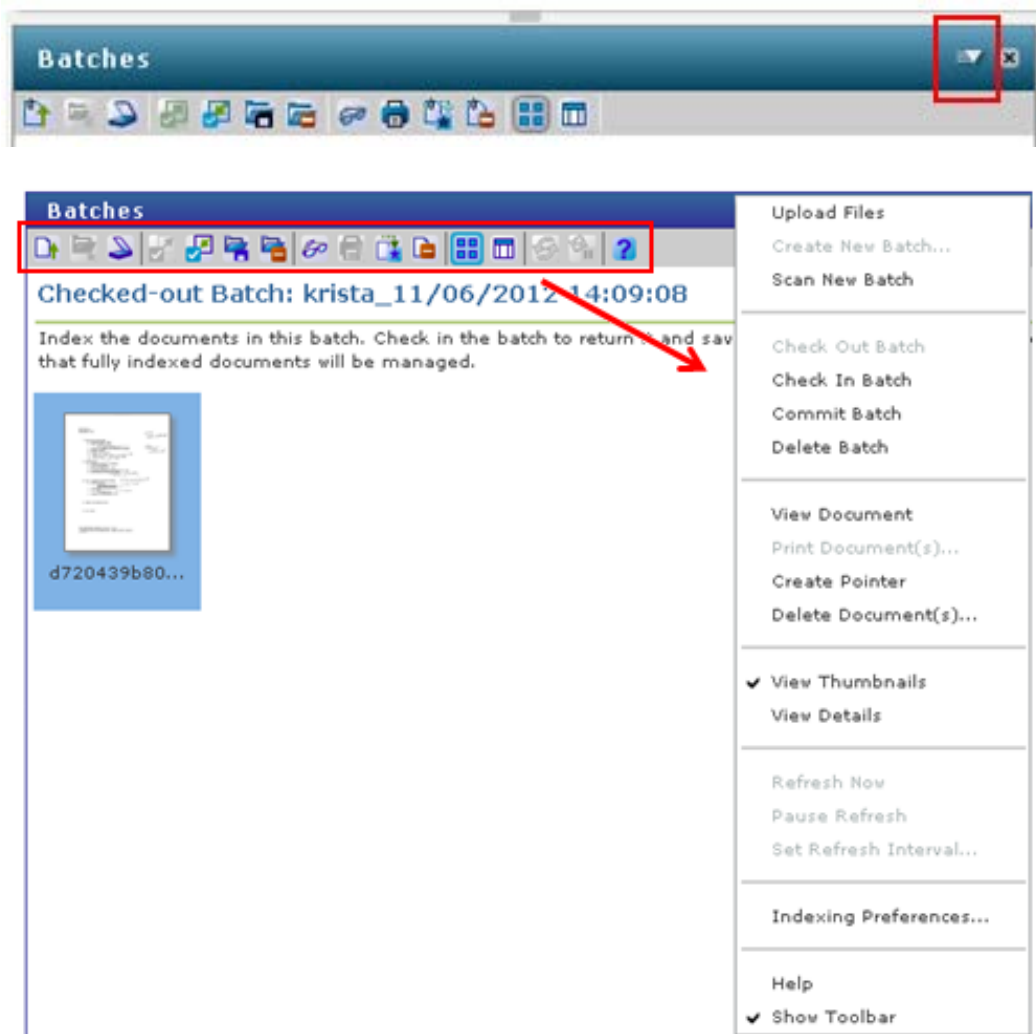
- Buttons and the drop down menu allow user to control view.
- Images can be e-mailed, printed or copied when the **Open as PDF** command is used.

## Panels Menu

- Select a **Panel** for specific tasks as needed.
- Some panels contain functions not available to PSU users at this time.

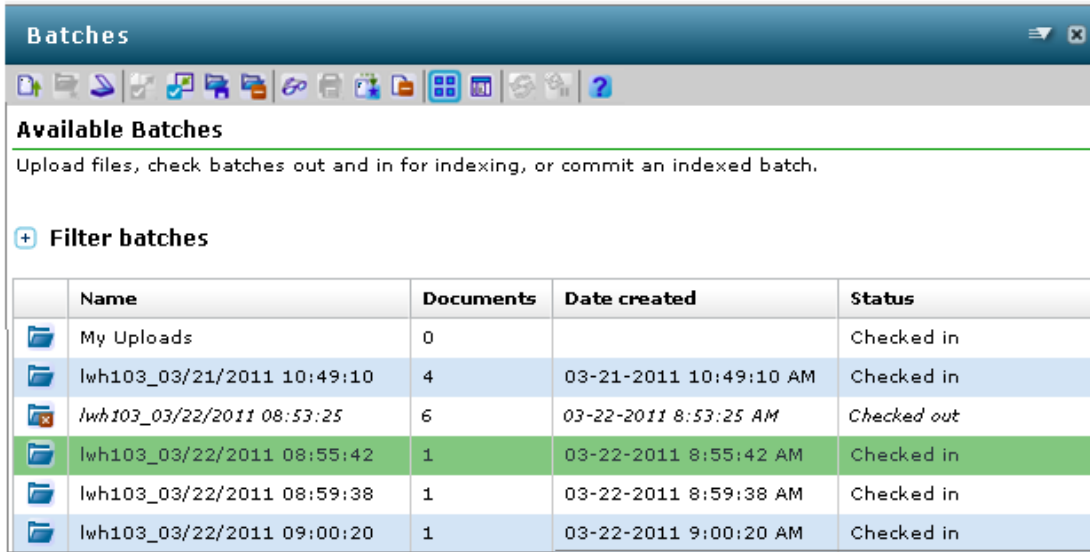


- Each panel has a **Button Bar** and a **Drop Down** menu for tasks and displays.



## Batch Panel

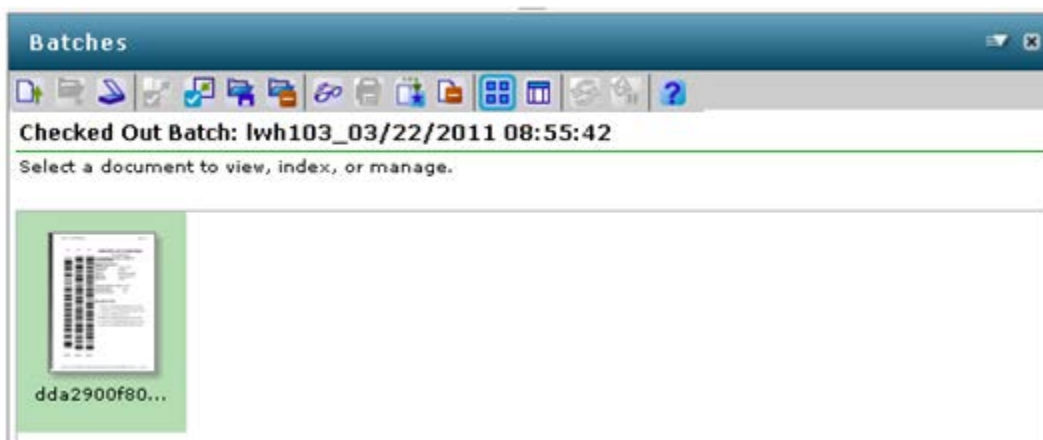
- **Batch** panel is used to access batches, search batches and manage batches.
- **Documents Upload** is done in the Batch panel. All file types are supported for upload.
- **Batch** panel displays batches of unindexed scanned images and uploaded documents.
- Uploaded documents are placed into **My Uploads** batch by default.
- Uploaded documents must be indexed just as scanned images are indexed.
- **Batches** must be checked out by user to begin indexing or to view images.
- Select Batch and click the **Check Out** button.



The screenshot shows the 'Batches' window with a toolbar and a table of available batches. The table has columns for Name, Documents, Date created, and Status. The 'My Uploads' batch is checked in with 0 documents. Several other batches are checked in with 1 document each, and one batch is checked out with 6 documents.

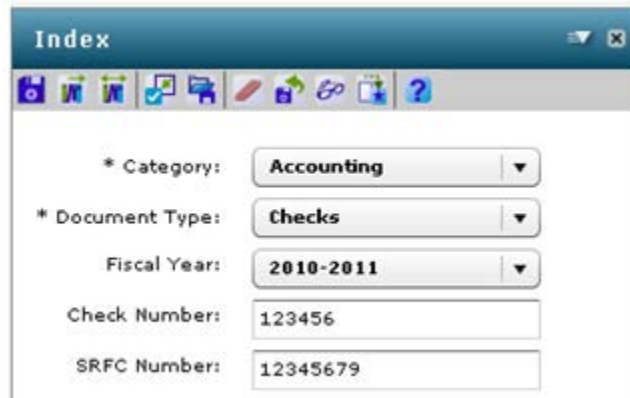
	Name	Documents	Date created	Status
	My Uploads	0		Checked in
	lwh103_03/21/2011 10:49:10	4	03-21-2011 10:49:10 AM	Checked in
	lwh103_03/22/2011 08:53:25	6	03-22-2011 8:53:25 AM	Checked out
	lwh103_03/22/2011 08:55:42	1	03-22-2011 8:55:42 AM	Checked in
	lwh103_03/22/2011 08:59:38	1	03-22-2011 8:59:38 AM	Checked in
	lwh103_03/22/2011 09:00:20	1	03-22-2011 9:00:20 AM	Checked in

- When a batch is checked out the **Batch Panel** display changes to thumbnail images for each image or document contained in the batch.



### Index Panel:

- **Index Panel** includes the Metadata that is to be assigned to images and documents.
- Selections are made or information typed for each **Metadata** field.
- The Metadata is added to the image or document and Saved.
- Metadata selections can be mass assigned and saved.
- When indexing is complete for a batch it must be committed. This completes the indexing process and releases the images and documents into the searchable database.
- Refer to **Indexing Images** documentation for more details on the indexing process.



The screenshot shows a window titled "Index" with a toolbar at the top. Below the toolbar, there are five input fields for metadata:

- \* Category: Accounting (dropdown menu)
- \* Document Type: Checks (dropdown menu)
- Fiscal Year: 2010-2011 (dropdown menu)
- Check Number: 123456 (text input)
- SRFC Number: 12345679 (text input)

### Help Menu:

- **Contents** contain DocFinity help by topic.
- **Hot Keys Reference** defines all default hot keys built into version 10.

