

SCAN WORX

document management specialists

Quick Reference: Administration Guide



System Administrator

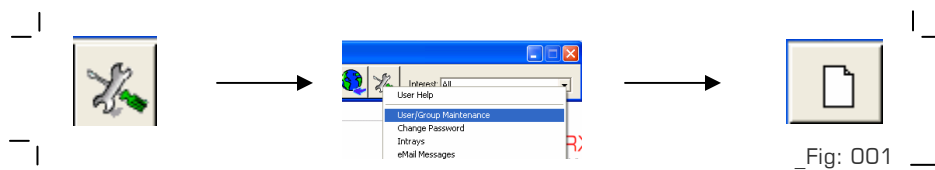
To carry out the following tasks in this guide you will need to login as the a system administrator:

User Name: Sysadm

Password: <<blank>>, unless specified otherwise.

Adding Users

- Open the Admin menu → User Group/Maintenance → Select the new user button.



- Fill in the “*New User’s Name*” with the user’s full name e.g. Anthony George.
- Select the “*Create Database Logon for User*” tick box.
- Provide a “*User Login Name*”. This is the name used to login to INVU.
- Set “*Assign User Roll*” to INVU_USER and provide the User with a password.
- Use the “*Copy details of existing user*” to copy another user’s profile e.g. provide the new user with the same privileges and access rights as an existing user. (If you wish to customise the user account do so before exiting this Edit User Dialog)
- Exit the **Edit User** box by selecting the green tick. This applies your settings.
- This will take you back to the **Combined User and Group Table**. Ensure that the Licence this User requires is ticked in the appropriate column i.e. S200

Short Display Name	Login Name	User Enable	Tray Enable	Access Privileges	Profile Owner	Default Security Profile	Default Interest	Task Enable	S200 Enable	S250 Enable
System Administrator	SYSADM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SYSADM	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Helen HR	HELEN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	<input type="checkbox"/>		Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Ian IT	IAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	<input type="checkbox"/>		Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Jon Milburn	JON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	<input type="checkbox"/>		Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peter Partner	PETER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	<input type="checkbox"/>		Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Simon Secretary	SIMON	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	General	<input type="checkbox"/>		Clients	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>


Indicates if eligible to use S250

NUM

_Fig: 002

Changing User Passwords*

IMPORTANT: This section is not relevant to those systems using Active Directory to login to INVU.

- Enter the **Combined User and Group Table** (see adding users).
- Select the User whose password is to be changed.
- Click on the Change user password button. 
- Complete the new password and confirm the password.
- Click OK to apply the changes .

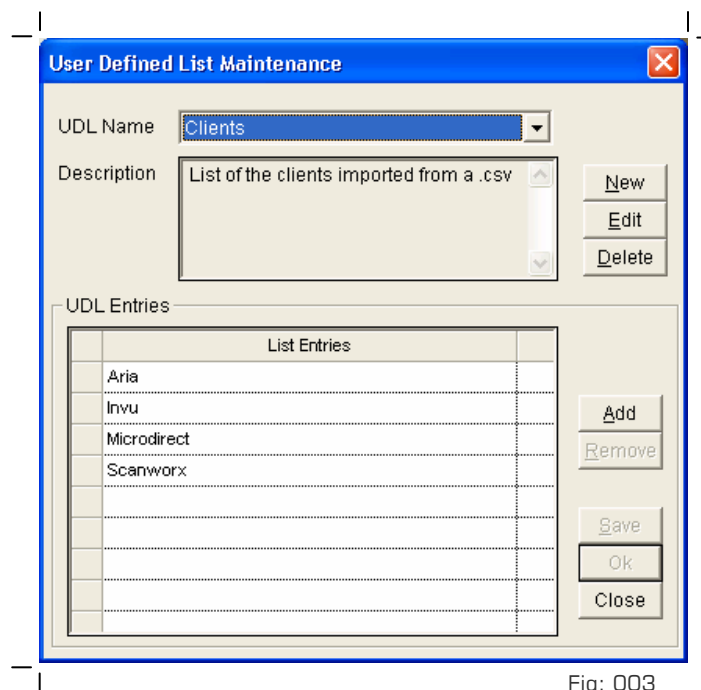
User Defined List

Creating a List

- Open the Administration menu and Select **User Defined List**.
- Click “New”, provide the list with a Name and a description of the list’s function.


Adding entries to a list

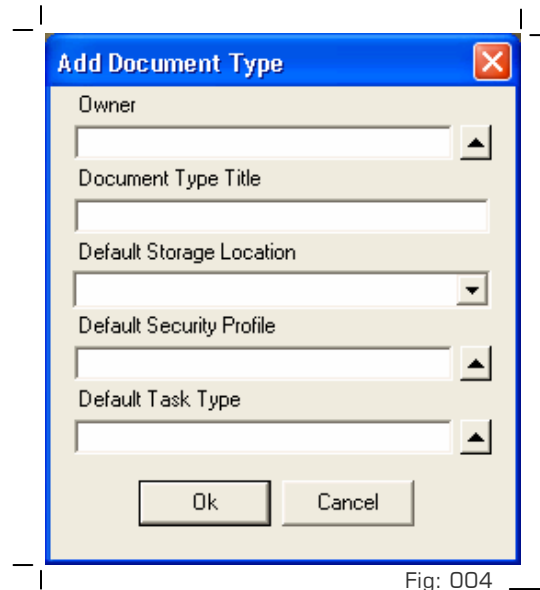
- Open the Administration menu and Select **User Defined List**
- Select the UDL Name from the drop down
- Click “Add” and type in your new value, repeat this action to add more values.



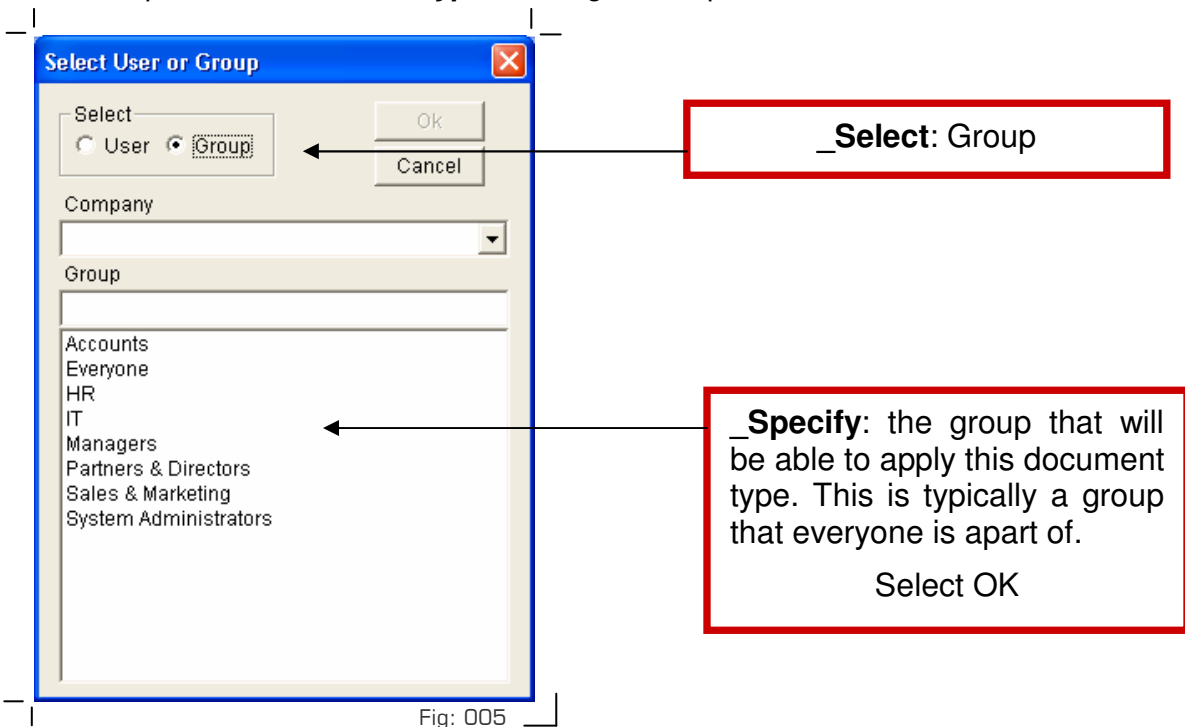
_Fig: 003

Create New Document types

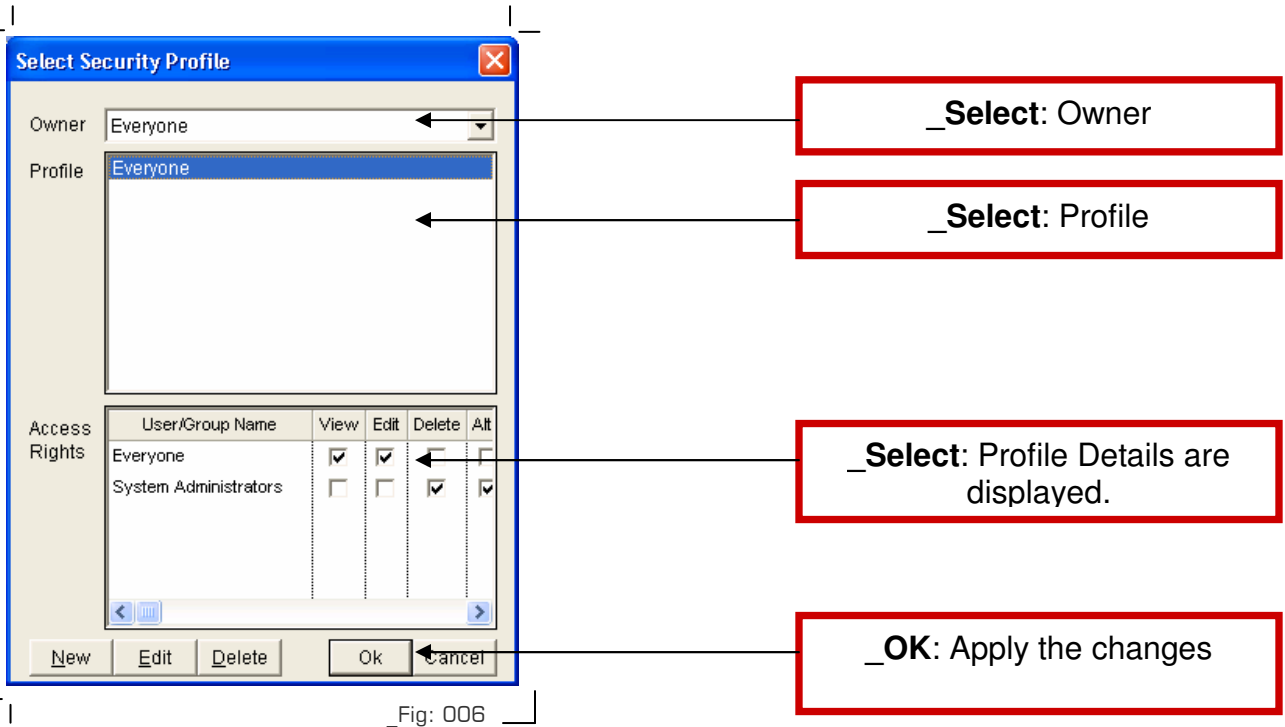
- Open the Administration menu and Select **Document Types**.
- Click on the **New Document Type** button  . _fig 004 will open.



- Click on the Owner drop down, this will open _fig 005 Select Group and then specify the group that will use the document type e.g. Everyone.
- Click OK on the **Select User or Group** window.
- Complete the **Document Type Title** e.g. Correspondence



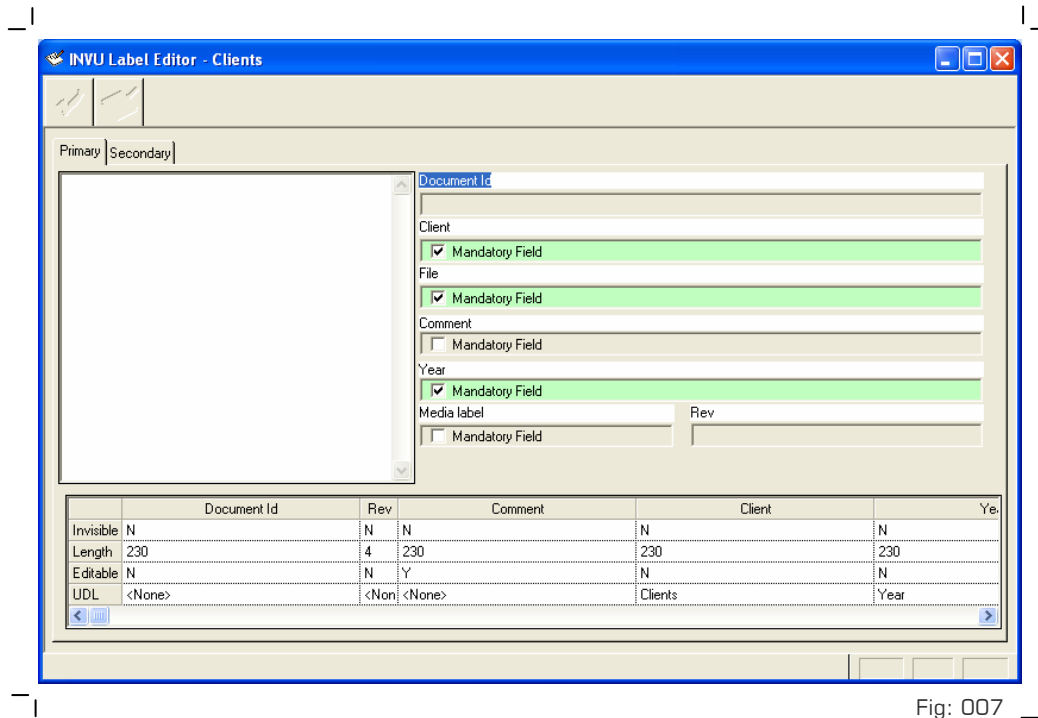
- Complete the Security Profile _Fig 006: Select the Owner. This will be either a group called Everyone or Sysadm.
- Upon selecting the appropriate Owner a profile will be displayed.
- Select the profile and click OK to apply the settings.



Label Editor

Changing Index Labels

In the Administration menu select the **Label Editor** this will open the following window:



_Fig: 007

- Edit the Labels to reflect the index information to be stored in that field e.g. Client name.
- If the field is essential to the retrieval of a document tick the field as **Mandatory Field** e.g. client in fig 007. Mandatory fields have to be completed by a user before an item or document can be indexed into the INVU system. Therefore it is recommended that at least one field is mandatory.
- There are two sets of Labels Primary and Secondary. Note do not use the Media Label on the primary tab and fields 1 to 3 as they are reserved for: Email from, Email subject and Email to.

Once you have finished editing your label information, select the green tick to apply the changes.

Index Field Attributes

Applying the changes you have made to Label names is recommended before proceeding with the following configuration.

- To edit the Label parameters double click anywhere in the bottom of the INVU Label Editor: this will open _Fig 008.

Field Name	Column Invisible	Field Length	Column Editable	User Defined List
Document Id	<input type="checkbox"/>	230	<input type="checkbox"/>	
Rev	<input type="checkbox"/>	4	<input type="checkbox"/>	
Comment	<input type="checkbox"/>	230	<input checked="" type="checkbox"/>	
Client	<input type="checkbox"/>	230	<input type="checkbox"/>	Clients
Year	<input type="checkbox"/>	230	<input type="checkbox"/>	Year
Drawer	<input checked="" type="checkbox"/>	230	<input type="checkbox"/>	
Folder	<input checked="" type="checkbox"/>	230	<input type="checkbox"/>	
File	<input checked="" type="checkbox"/>	230	<input type="checkbox"/>	
Current Job	<input type="checkbox"/>	230	<input type="checkbox"/>	
Current User	<input type="checkbox"/>	15	<input type="checkbox"/>	
Last User	<input type="checkbox"/>	15	<input type="checkbox"/>	
Checked In	<input type="checkbox"/>		<input type="checkbox"/>	
Checked Out	<input type="checkbox"/>		<input type="checkbox"/>	
File	<input type="checkbox"/>	230	<input type="checkbox"/>	File Type
Entry Date	<input type="checkbox"/>		<input type="checkbox"/>	
Document	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Security Level	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	
Media label	<input checked="" type="checkbox"/>	230	<input type="checkbox"/>	
Email To	<input type="checkbox"/>	100	<input type="checkbox"/>	
Email Subject	<input type="checkbox"/>	100	<input type="checkbox"/>	
Email From	<input type="checkbox"/>	100	<input type="checkbox"/>	
Originator	<input type="checkbox"/>	100	<input type="checkbox"/>	Originators
fieldx5	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>	
fieldx6	<input checked="" type="checkbox"/>	100	<input type="checkbox"/>	

_Fig: 008

Columns Invisible

- To help keep the information returned in the search screen as concise as possible it is necessary to hide unused columns.
- Hide Drawer, Folder, File, Media label and Security Level and any unused columns e.g. fig 008, fields 5 and 6. This is achieved by checking the appropriate tick boxes.
- Use the green tick to save changes when you have finished.

Columns Non-Editable


It is recommended that only a Comments/Notes label is left editable. This means that this value can be directly edited from the search screen, as you can with a spread sheet, without having to enter the properties window*. Use the green tick to save any changes when you have finished. * see general training

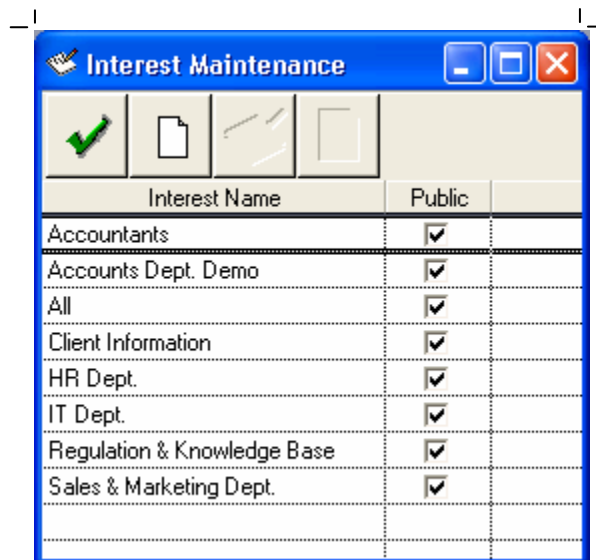
Assigning User Defined List

The final column in the **INVU Label Editor – Table Properties** Fig 008, is User defined Lists.

- Click in the appropriate cell, and select the dropdown list.
- Select the Required UDL, and Use the green tick to save changes when you have finished.

Adding a new Interest (Digital Filing Cabinet)

- Open the Administration menu and Select **Interests** _Fig 009
- Select the New Button 
- Provide the Interest with a new Name Click OK.
- _Fig 010 Will open.
 - Public Interest: If you require all users to have access to the new interest leave ensure the **Public** Tick box is checked.
 - If you require restricted access to the interest uncheck the **Public** tick box and select add. Add the appropriate Group(s)/User(s).



_Fig: 009



_Fig: 010

Regular Maintenance

Maintaining Search Window Drop Down Lists

The dropdown lists in the **Search Screen** (Query Screen) hold the index information concerning items previously indexed into INVU. If said items' are deleted the index information still resides in the associated dropdown list.

To update the lists:

- Click on the Administration button and Select **Parameters**
- Double click **List Max Items** and Increment the value by 1*
- Apply the changes using the **Green Tick** and select 'Yes' proceed on the following Window.

*Decrement by 1 on the next update

Optimising the Database

Performing this task allows INVU reorganise the document indexing information in order to maintain database efficiency.

Select the administration button → Select Optimise Database.

Backup Procedure

Backing-up

To successfully backup the database:

- Ensure all users are logged out of the INVU system.
- Terminate all of the INVU Services, starting with the database services and concluding with the Centura SQL base. Two batch files are provided to assist with the starting and stopping of the aforementioned services.

These batch files can be found on the Server's desktop.

- Backup the S200* or S250* subfolder located in the Centura directory. (i.e. the closed dbs file and any existing log files)

* The folder backed up is dependant on your system. If you unsure of the system you have select the **about INVU** option from the Admin menu, your INVU system number is illustrated at the top of the window.

- Backup the File Repository (FR), InvuData and InvuSecure

IMPORTANT: If the INVU Services are not stopped before the backup is taken the dbs database backup will be corrupted. Although no error is displayed the backup will be ineffective.