



ApplicationXtender Desktop
5.30

INSTALLATION GUIDE

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This guide provides instructions on how to install the ApplicationXtender Desktop (AppXtender Desktop) software.

As part of an effort to improve and enhance the performance and capabilities of its product line, EMC from time to time releases revisions of its hardware and software. Therefore, some functions described in this *ApplicationXtender Desktop Installation Guide* may not be supported by all revisions of the software or hardware currently in use. For the most up-to-date information on product features, refer to your product release notes. If a product does not function properly or does not function as described in this *ApplicationXtender Desktop Installation Guide*, please contact your EMC representative.

Audience The information in this guide is intended for system administrators who are responsible for installing software and maintaining the servers and clients on a network. Operators who monitor the daily backups may also find this manual useful.

Organization Here is a list of where information is located in this guide.

Table 1 Guide Summary

Title	Description
Chapter 1, <i>Installing ApplicationXtender Desktop</i>	Explains different methods for installing AppXtender Desktop: Using the setup wizard and using Unattended Setup.
Chapter 2, <i>Configuring AppXtender Document Manager Workstations</i>	Explains all of the configuration options available for individual AppXtender Document Manager workstations. It also describes how the Save/Load Settings feature can be used to copy AppXtender Document Manager configuration settings from one workstation to one or more other workstations.
Appendix A, <i>Maintaining the AppXtender Desktop Installation</i>	Explains how to modify, repair, or remove an AppXtender Desktop installation.

Related Documentation After installing the AppXtender Desktop software, refer to the *ApplicationXtender Desktop User's Guide*, the *ApplicationXtender Image Capture User's Guide*, and the program's Online Help for detailed instructions on how to use the AppXtender Desktop software.

Post-release information is contained in the Release Supplement for this product. This document is available by clicking the Product Documentation link at customernet.documentum.com. Refer to the web site periodically to view the latest Release Supplement. You must have a Technical Support account to access the product documentation on this site. If you do not already have a Technical Support account, request one at support.documentum.com/support/access/dmRegistration.asp.

Related documents include:

- ◆ *ApplicationXtender Concepts Guide*
- ◆ *ApplicationXtender Core Components Administrator's Guide*
- ◆ *ApplicationXtender Administrator's Quick Reference*
- ◆ *ApplicationXtender Desktop User's Guide*
- ◆ *ApplicationXtender Desktop User's Quick Reference*
- ◆ *ApplicationXtender Image Capture User's Guide*
- ◆ *ApplicationXtender Image Capture User's Quick Reference*
- ◆ *ApplicationXtender Technical Product Overview*

Most of these documents can be found in the Documentation directory on the product CD-ROM. All documents are in Adobe

Acrobat Portable Document Format (PDF), and can be viewed by downloading and installing the Adobe Acrobat Reader. The Reader is available on the EMC[®] AppXtender Desktop/Web CD-ROM, or directly from Adobe at www.adobe.com. To install and use the Reader on the preferred platform, refer to the instructions on the Adobe web site.

Conventions Used in This Guide

EMC uses the following conventions for notes, cautions, warnings, and danger notices.

A note presents information that is important, but not hazard-related.



CAUTION

A caution contains information essential to avoid data loss or damage to the system or equipment. The caution may apply to hardware or software.

Typographical Conventions

EMC uses the following type style conventions in this guide:

AVANT GARDE	Keystrokes
Palatino, bold	<ul style="list-style-type: none"> ◆ Dialog box, button, icon, and menu items in text ◆ Selections you can make from the user interface, including buttons, icons, options, and field names
<i>Palatino, italic</i>	<ul style="list-style-type: none"> ◆ New terms or unique word usage in text ◆ Command line arguments when used in text ◆ Book titles

<i>Courier,</i> <i>italic</i>	Arguments used in examples of command line syntax.
----------------------------------	--

Courier	System prompts and displays and specific filenames or complete paths. For example: working root directory [/user/emc]: c:\Program Files\EMC\Symapi\db
---------	---

Courier, bold	<ul style="list-style-type: none"> ◆ User entry. For example: <code>sympoll -p</code> ◆ Options in command line syntax
--------------------------------	--

Where to Get Help

For questions about technical support, call your local sales office or service provider.

If you have a valid EMC service contract, contact EMC Customer Support at:

North America, 1-877-534-2867

Canada, and

Latin America:

Europe, Middle East, and Africa: +800-EMC2-EMC2

East, and Africa: (+800-3622-3622)*

Africa:

Asia Pacific and Japan: +800-EMC2-EMC2 (+800-3622-3622)

Japan:

*Please see dialing instructions on the EMC Website at:

http://customernet.documentum.com/support/access_numbers.htm

Follow the voice menu prompts to open a service call and select the applicable product support.

ApplicationXtender Desktop (AppXtender Desktop) Setup can be customized for your particular installation scenario. You can choose to install AppXtender Desktop using two different methods. For more information, see the following sections:

- ◆ Third-party Components Required Before Setup 1-2
- ◆ Setup Wizard 1-6
- ◆ Unattended Setup 1-17
- ◆ Configuration Overview 1-24



CAUTION

If you are upgrading an existing ApplicationXtender system, you *must* begin the upgrade with the procedure in the *ApplicationXtender Core Components Administrator's Guide*.

Third-party Components Required Before Setup

The following third-party components are not automatically installed during the AppXtender Desktop installation process:

- ◆ If you are running Windows 98 SE, Windows ME, or Windows 2000, you might not have Microsoft Windows Installer (MSI) 2.0 installed. MSI 2.0 must be installed prior to running the AppXtender Desktop setup wizard or an Unattended Setup. For instructions on installing MSI 2.0, see *Installing Microsoft Windows Installer* on page 1-2.
- ◆ If you are installing AppXtender Desktop on a workstation on which user or group lists will be imported in ApplicationXtender Application Generator (AppXtender AppGen), the workstation must have Active Directory Services (ADS) 2.5. If you are running Windows 98 SE or Windows ME, you might not have ADS 2.5 installed. For instructions on installing ADS 2.5, see *Installing Active Directory Services* on page 1-3.
- ◆ If you are installing AppXtender Desktop with AppXtenderDEMO (the AppXtender demonstration database), the computer must have the Microsoft Jet 4.0 OLE DB Provider installed. All supported operating systems except Windows 98 SE include this provider. If you are installing AppXtenderDEMO on a Windows 98 SE computer, you may need to install this provider. For instructions on installing this provider, see *Installing Microsoft Jet 4.0 OLE DB Provider* on page 1-4.
- ◆ If you are installing AppXtender Desktop on a workstation which will be used to run the AppXtender Index Server, the workstation must have Internet Explorer 5 or later.

Installing Microsoft Windows Installer

If you are running Windows 98 SE, Windows ME, or Windows 2000, you might not have Microsoft Windows Installer (MSI) 2.0 installed. MSI 2.0 must be installed prior to running the AppXtender Desktop setup wizard or an Unattended Setup.

To install MSI 2.0:

1. Close all open applications.
2. Obtain the installation files for AppXtender Desktop third-party components. You have the following choices:
 - Download the `ThirdPartyComponents_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)
 - Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.
 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. In the temporary directory or CD-ROM drive, navigate to the `Third Party Components\Microsoft Installer 2.0` directory and run one of the following files:
 - If you are installing to a Windows 98 SE or Windows ME computer, run `INSTMSI.EXE`.
 - Otherwise, run `INSTMSIW.EXE`.Windows Installer Setup begins. When the installation is complete, the Windows Installer message appears indicating that setup has completed successfully.
4. Click OK.
5. When setup is complete, you may be required to restart your computer. Be sure to restart your computer if prompted.

Installing Active Directory Services

If you are installing AppXtender Desktop on a workstation on which user lists will be imported in AppXtender AppGen for security, the workstation must have Active Directory Services (ADS) 2.5. If you are

running Windows 98 SE or Windows ME, you might not have ADS 2.5 installed. Use the following steps to install ADS 2.5.

To install ADS:

1. Close all open applications.
2. Obtain the installation files for AppXtender Desktop third-party components. You have the following choices:
 - Download the `ThirdPartyComponents_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. In the temporary directory or CD-ROM drive, navigate to the `Third Party Components\Active Directory Services 2.5` directory and run one of the following files:
 - If you are installing to a Windows 98 SE computer, run `ADS98.EXE`.
 - Otherwise, run `ADS.EXE`.

The Active Directory Service Interfaces Version 2.5 message appears, asking if you want to install ADS.
4. Click Yes. The Active Directory Service Interfaces Version 2.5 license agreement appears.
5. Click Yes. A message appears indicating that the installation is done.
6. Click OK.

Installing Microsoft Jet 4.0 OLE DB Provider

If you are installing AppXtender Desktop with AppXtenderDEMO (the AppXtender demonstration database), the computer must have the Microsoft Jet 4.0 OLE DB Provider installed. All supported operating systems except Windows 98 SE include this provider. If you

are installing AppXtenderDEMO on a Windows 98 SE computer, you may need to install this provider.

To install the Microsoft Jet 4.0 OLE DB Provider:

1. Close all open applications.
2. Obtain the installation files for AppXtender Desktop third-party components. You have the following choices:

- Download the `ThirdPartyComponents_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

- Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. In the temporary directory or CD-ROM drive, navigate to the `Third Party Components\Microsoft Jet 4.0` directory and run one of the following files:
 - If you are installing to a Windows 98 SE computer, run `Jet40SP7_9xNT.exe`.
 - If you are installing to a Windows ME computer, run `Jet40SP7_WMe.exe`.
 - If you are installing to a Windows XP computer, run `WindowsXP-KB829558-x86-ENU.exe`.
 - If you are installing to a Windows 2000 computer, run `Windows2000-KB829558-x86-ENU.exe`.
 - If you are installing to a Windows 2003 computer, run `WindowsServer2003-KB829558-x86-ENU.exe`.

Setup begins. When the installation is complete, a message appears indicating that setup has completed successfully.

4. Click OK.
5. When setup is complete, you may be required to restart your computer. Be sure to restart your computer if prompted.

Setup Wizard

The ApplicationXtender Desktop (AppXtender Desktop) installation process follows standard Windows setup wizard rules, with prompts that guide you through the installation process.

Within the setup wizard, the Next button allows you to proceed to the next page, while the Back button allows you to return to the previous page. You can cancel the installation by clicking Cancel. For detailed procedures, follow the instructions contained in each of the following sections:

- ◆ *Starting Setup* on page 1-7
- ◆ *Product Conflict Page* on page 1-8
- ◆ *Welcome Page* on page 1-8
- ◆ *License Agreement Page* on page 1-8
- ◆ *Destination Folder Page* on page 1-9
- ◆ *Select Installation Type Page* on page 1-10
- ◆ *Select Features Page* on page 1-12
- ◆ *Completing the Installation* on page 1-15

Although a full AppXtender Desktop installation requires up to 497 MB of hard disk space (depending on your operating system), you can also choose which components you would like to install to minimize hard disk usage.

Starting Setup

This procedure allows you to begin the setup process.

These installation instructions apply only to the English release of AppXtender Desktop. For instructions on installing releases of AppXtender Desktop for other languages, refer to the *ApplicationXtender Release Supplement* for that language.

To begin the setup process:

1. Close all open applications.
2. Obtain the installation files for AppXtender Desktop. You have the following choices:
 - Download the `Desktop_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (`ftp.emc.com\Software\AppXtender5.30\Desktop`)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. In the temporary directory or CD-ROM drive, navigate to the `AppXtender Desktop` directory and run `setup.exe`. The AppXtender Desktop setup wizard appears.

If a previous release of AppXtender or another Content Management product exists on the workstation, the first page of the wizard allows you to uninstall the previous release. For information, see *Product Conflict Page* on page 1-8. Otherwise, the Welcome page appears. For information, see *Welcome Page* on page 1-8.

Product Conflict Page

The Product Conflict page allows you to uninstall previous releases.

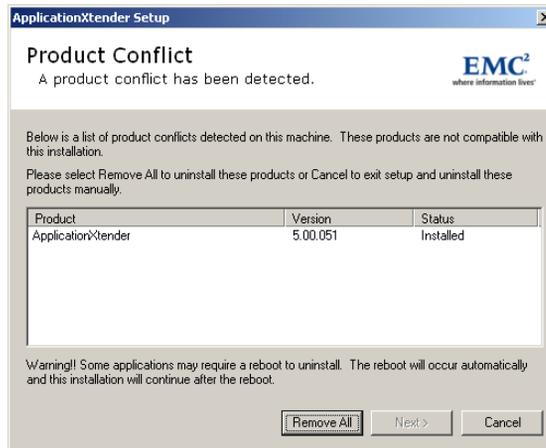


Figure 1-1 AppXtender Setup Wizard - Product Conflict Page

To continue the setup process:

1. Click Remove All.
2. When all conflicting products have been uninstalled, the Next button becomes available. Click Next. The Welcome page appears. For information, see *Welcome Page* on page 1-8.

Welcome Page

The AppXtender Desktop setup wizard Welcome page introduces the setup process.

To continue the setup process:

- ◆ Click Next. The License Agreement page appears. For instructions, see *License Agreement Page* on page 1-8.

License Agreement Page

The License Agreement page allows you to read and accept the software license agreement.

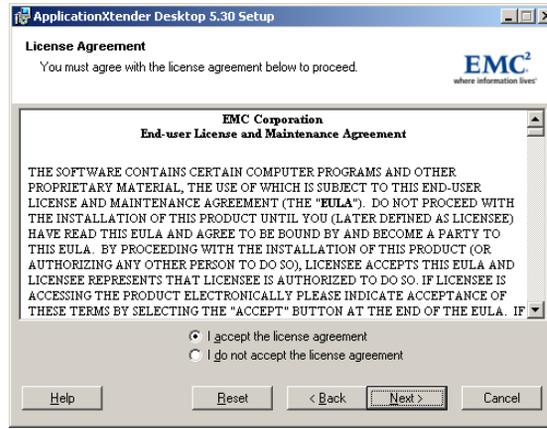


Figure 1-2 AppXtender Desktop Setup Wizard - License Agreement Page

To continue the setup process:

1. Read the License Agreement.
2. After reading the License Agreement, you have the following choices:
 - Enable the I accept the license agreement option. The Next button becomes available. Click Next. The Destination Folder page appears. For instructions, see *Destination Folder Page* on page 1-9.
 - Enable the I do not accept the license agreement option. If you do not accept the terms of the License Agreement, you must click Cancel to terminate the installation.

Destination Folder Page

The Destination Folder page allows you to customize the AppXtender Desktop installation directory (the destination folder). By default, AppXtender Desktop installs to `C:\Program Files\XtenderSolutions\Content Management`, but you can change the destination folder from this page.

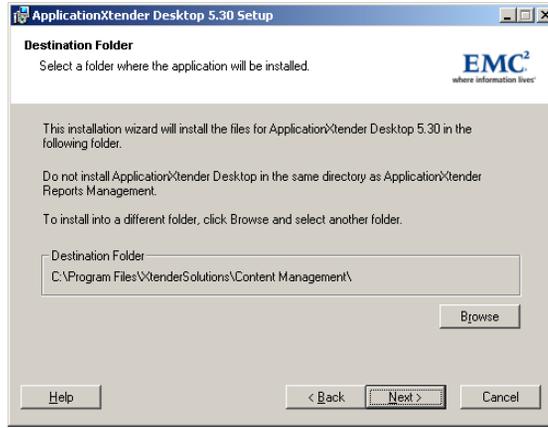


Figure 1-3 AppXtender Desktop Setup Wizard - Destination Folder Page

If AppXtender Desktop setup detects any AppXtender component already installed on the workstation, the setup wizard allows only one AppXtender Desktop destination directory: the directory in which the other AppXtender component is installed. To continue the setup process, click Next.

To continue the setup process:

- ◆ If no other AppXtender Desktop Content Management products are detected on the workstation, you have the following choices:
 - If the destination folder listed in the Destination Folder box is the one you want to use, click Next.
 - If the destination folder listed in the Destination Folder box is *not* the one you want to use, click Browse and choose the directory you would like to use. Click OK to return to the Destination Folder page. Click Next.

The Select Installation Type page appears. For instructions, see *Select Installation Type Page* on page 1-10.

Select Installation Type Page

The Select Installation Type page allows you to choose the type of workstation installation you need. You can choose a Retrieval workstation type (which installs all components necessary for document retrieval), a Scanning workstation type (which installs all components necessary for scanning), or an Administrator workstation type (which installs all components necessary for

AppXtender administration). If you prefer to select which components to install, this page allows you to perform a custom installation.



Figure 1-4 AppXtender Desktop Setup Wizard - Select Installation Type Page

To continue the setup process:

1. Select the type of AppXtender Desktop installation that you want to use. You can install a Retrieval, Scanning, or Administrator workstation type, or you can select Custom to customize your installation. For information on each of the workstation types, refer to the "Workstation Types" section of the *ApplicationXtender Concepts and Planning Guide*.

If you select the Scanning workstation type, you must install the appropriate drivers prior to scanning documents in AppXtender Document Manager or Image Capture. For more information, see *Installing Scanner Drivers* on page 1-24.

2. Click Next. The page that appears next depends on the type of installation you choose:
 - If you chose the Administrator installation type, the Select Administrator Installation Type page appears. For instructions, refer to the *ApplicationXtender Core Components Guide* or the *ApplicationXtender Index Server Administrator's Guide*.

- If you chose the Custom installation type, the Select Features page appears. For instructions, see *Select Features Page* on page 1-12.
- If you chose the Retrieval or Scanning installation type, the Ready to Install the Application page appears. For instructions, see *Completing the Installation* on page 1-15.

Select Features Page

The Select Features page allows you to include or exclude components from the installation.

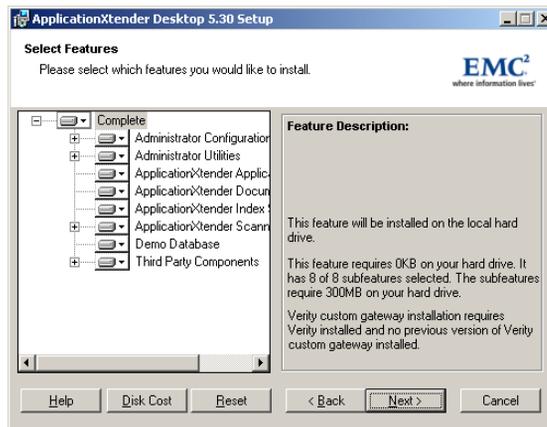


Figure 1-5 AppXtender Desktop Setup Wizard - Select Features Page

The Select Features page lists available components in a tree. The following table describes each of the available components:

Table 1-1 AppXtender Desktop Components

Component	Description
Administrator Configuration	
ApplicationXtender Administrator	Installs the ApplicationXtender Administrator (AppXtender Admin), which allows the AppXtender system administrator to configure data sources, licensing, and other settings for AppXtender content management products.
ApplicationXtender User Profile Administrator	Installs the ApplicationXtender User Profile Administrator (AppXtender User Profile Admin), which can be used to manage AppXtender Web user profiles from a central location.

Table 1-1 AppXtender Desktop Components (continued)

Component	Description
Administrator Utilities	
ApplicationXtender Archive Wizard	Installs the AppXtender Archive component, allowing administrators to archive infrequently accessed documents.
ApplicationXtender Full Text Index Wizard	Installs AppXtender Full Text Index, allowing administrators to submit documents to the AppXtender Index Server for full-text indexing. This wizard allows administrators to submit more documents at a time than the AppXtender Desktop result set allows.
Import Utilities	Installs the AppXtender Index Image Import, Auto Index Import, and Key Reference Import wizards. All three allow administrators to import index information. The AppXtender Index Image Import wizard allows administrators to import indexed AppXtender documents.
ApplicationXtender Migration Wizard	Installs the AppXtender Migration component, allowing administrators to migrate applications from one AppXtender data source to another.
ApplicationXtender Move Online	Installs the AppXtender Move Online component, allowing administrators to move scanned documents from a local scan storage area to an application's primary document write path.
ApplicationXtender Queue Manager	Installs the AppXtender Queue Manager component, allowing administrators to manage AppXtender data sources and AppXtender Index Server processing queues.
ApplicationXtender Records Manager Administrator	Installs the ApplicationXtender Records Manager Administrator (AppXtender RM Admin), which allows administrators to set retention modes for AppXtender applications.
ApplicationXtender Application Generator	Installs the AppXtender AppGen component, allowing administrators to configure and manage AppXtender applications, security, and licensing.
ApplicationXtender Document Manager	Installs the AppXtender Document Manager application, allowing users to create, retrieve, and manage documents.
ApplicationXtender Index Server	Installs the AppXtender Index Server component, allowing administrators to submit documents to a full-text database.
Verity K2 for ApplicationXtender Gateway	Installs the Verity K2 for ApplicationXtender Gateway (Verity for AppXtender Gateway), allowing administrators to configure the use of the Verity K2 Server as the full-text indexing engine.
ApplicationXtender Scanner Support	Installs Scanner Support components, allowing users to scan in new documents and batches. BUIC, Context, ISIS, Kofax, TWAINWIA, and/or Vidar support can be installed.

Table 1-1 AppXtender Desktop Components (continued)

Component	Description
ApplicationXtender Image Capture	Installs the AppXtender Image Capture component, allowing users to create batches. One copy of AppXtender Image Capture is provided free of charge for any network purchase of AppXtender Desktop. If you need AppXtender Image Capture on more than one workstation, you must purchase additional copies.
Demo Database	Installs a sample database (demonstration database files, demonstration application image files, and the AppXtenderDEMO data source).
Third Party Components	
ABBYY FineReader 6.0 engine	Installs the ABBYY FineReader 6.0 engine, allowing users to perform OCR.
Adobe PDF Library 6.0	Installs Adobe PDF Library 6.0, allowing users to view, print, endorse, full-text index, and annotate PDF files in AppXtender Desktop.
Microsoft Data Access Components 2.8	Installs Microsoft Data Access Components (MDAC) 2.8 unless a higher version already exists. MDAC allows administrators to create AppXtender data sources.
Verity KeyView 9.1	Installs Verity KeyView 9.1, allowing users to view the content of some foreign files in AppXtender Desktop.

The following procedure describes how to include or exclude components from the AppXtender Desktop installation.

To include or exclude AppXtender Desktop components:

1. Decide which features (components) you want to include or exclude.
2. For each component that you want to include, click the disk icon located next to the component. A menu appears, providing installation options. From the menu, select Will be installed on the local hard drive.
3. For each component that you want to exclude, click the disk icon located next to the component and select Entire feature will be unavailable.
4. If, after changing components to be installed, you would like to reset the components to their defaults, click Reset.
5. If you want to know how much space is required for the specific installation you have selected, click Disk Cost. A dialog box appears displaying each drive of the workstation where AppXtender Desktop will be installed, its available disk space,

and the amount required for the installation. If there is not enough space available on the drive where you are trying to install AppXtender Desktop, it will be highlighted in this dialog box.

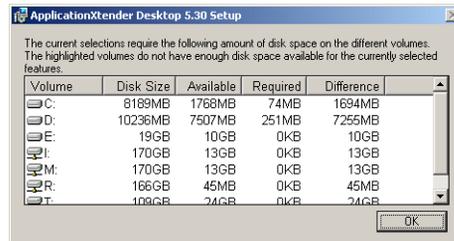


Figure 1-6 AppXtender Desktop Setup Disk Cost Dialog Box

In the disk cost dialog box, click OK.

- After you have configured which components you would like to install, click Next.

The AppXtender Desktop setup wizard checks for the existence of Microsoft .NET Framework on the computer. If it is not already installed, Read to Install the Microsoft .NET Framework page appears. If this page appears, click Next and follow the prompts. When setup is complete, you may be required to restart your computer. Be sure to restart your computer if prompted. Then if necessary, restart the AppXtender Desktop setup wizard as described in *Starting Setup* on page 1-7.

The Ready to Install the Application page appears. For instructions, see *Completing the Installation* on page 1-15.

Completing the Installation

The Ready to Install the Application page allows you to complete the installation.

To complete the installation:

- Click Next. AppXtender Desktop begins installing the components you selected. The Updating System page indicates the progress of the installation.
- Wait for AppXtender Desktop to finish the installation process. This may take several minutes. The Finished page appears, indicating a successful installation.

3. Click Finish. If you must restart your computer, a message prompting you to do so appears.

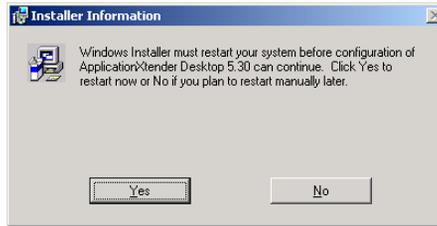


Figure 1-7 Installer Information Restart System Message

4. You have the following choices:
 - To restart your system now, click Yes.
 - To close AppXtender Desktop Setup without restarting your system, click No.

It is highly recommended that you restart your system when prompted to do so by AppXtender Desktop. Otherwise, conflicts may occur.

Unattended Setup

With an ApplicationXtender Desktop (AppXtender Desktop) Unattended Setup, you can ensure that AppXtender Desktop is installed consistently on multiple workstations. An Unattended Setup can perform an installation using the Windows command line.

Unattended Setup is provided for administrators who:

- ◆ Are familiar with the AppXtender Desktop installation process.
- ◆ Are installing AppXtender Desktop on workstations that already have all of the required third-party components.
- ◆ Do not need to perform a custom installation.
- ◆ Do not need to upgrade an installation.

To perform an Unattended Setup:

1. Install all required third-party components. For instructions, see *Installing Third-Party Components* on page 1-17.
2. Compose a command line to install AppXtender Desktop unattended, according to your needs. For instructions, see *Unattended Setup Command Line Syntax* on page 1-18.
3. Run unattended setup from the Windows command prompt. For instructions, see *Running Unattended Setup from the Command Line* on page 1-22.

Installing Third-Party Components

The following table lists operating systems and the components that may need to be installed on each.

Table 1-2 Third-Party Components List

Operating System	Components that must be installed
Windows 98 SE	Common Control MSI 2.0 Windows HTML Help ADS 2.5
Windows ME	MSI 2.0 ADS 2.5

Table 1-2 Third-Party Components List (continued)

Operating System	Components that must be installed
Windows XP	
Windows 2000	MSI 2.0
Windows 2003	

The following sections provide information about installing MSI and ADS before running an Unattended Setup:

- ◆ *Installing Microsoft Windows Installer* on page 1-2
- ◆ *Installing Active Directory Services* on page 1-3 (necessary only if you are installing AppXtender Desktop on a workstation on which user lists will be imported in AppXtender AppGen for Content Management security)

If you are installing AppXtender Desktop on a workstation that will be used to run the AppXtender Index Server, the workstation must have Internet Explorer 5 or later.

Unattended Setup Command Line Syntax

Unattended Setup is run using MSiExec (Microsoft Windows Installer) from the Windows command line. An option is available for each configurable installation parameter.

A Windows command line would appear as follows:

```
MsIExec.exe /I ApplicationXtender.msi /Q INSTALLMODE=#  
INSTALLDIR="Path" /L "log_path_&_filename"
```

The following table describes each parameter of these command lines:

Table 1-3 Unattended Setup Command Line Syntax

Parameter	Windows Command Line
MsIExec.exe	This parameter calls the Microsoft Windows Installer application (mandatory parameter).
/I ApplicationXtender.msi	This parameter must follow MsIExec.exe (mandatory parameter).
/Q	This parameter indicates that no user interface (UI) will be visible (mandatory parameter for true unattended setup).

Table 1-3 Unattended Setup Command Line Syntax (continued)

Parameter	Windows Command Line
INSTALLMODE	This parameter establishes which components will be installed (mandatory parameter, requires /Q). No spaces should be placed between INSTALLMODE , the = sign, and the installation mode number. For a list of the available installation modes, see <i>Installation Mode</i> on page 1-19.
INSTALLDIR	This parameter designates an installation path other than the AppXtender Desktop default directory of C:\Program Files\XtenderSolutions\Content Management (optional). No spaces should be placed between INSTALLDIR , the = sign, and the installation directory. For a discussion of this command, see <i>Installation Directories</i> on page 1-21.
/L	This parameter designates the log path and filename (optional). The directory that you specify must already exist.

Paths and filenames should be surrounded by quotation marks.

For sample Unattended Setup command lines, see *Sample Unattended Setup Command Lines* on page 1-22.

Installation Mode

Four installation types are available using AppXtender Desktop Unattended Setup. To designate an installation type, use the **INSTALLMODE** command with the appropriate installation mode number.

INSTALLMODE is a mandatory parameter for AppXtender Desktop Unattended Setup command line syntax.

The following table lists the installation modes (components or component groupings) available during AppXtender Desktop Unattended Setup:

Table 1-4 Installation Modes Available During Unattended Setup

Usage	AppXtender Document Manager	AppXtender Scanner Support	Administrator Utilities	AppXtender AppGen	AppXtender Index Server	Administrator Configuration	Demo Database
INSTALLMODE=1	√						
INSTALLMODE=2	√	√					
INSTALLMODE=3	√	√	√				
INSTALLMODE=4	√	√		√			

Table 1-4 Installation Modes Available During Unattended Setup (continued)

Usage	AppXtender Document Manager	AppXtender Scanner Support	Administrator Utilities	AppXtender AppGen	AppXtender Index Server	Administrator Configuration	Demo Database
INSTALLMODE=5	√	√	√	√			
INSTALLMODE=6					√		
INSTALLMODE=7	√	√	√		√		
INSTALLMODE=8	√	√		√	√		
INSTALLMODE=9	√	√	√	√	√		
INSTALLMODE=10						√	
INSTALLMODE=11	√	√	√			√	
INSTALLMODE=12	√	√		√		√	
INSTALLMODE=13	√	√	√	√		√	
INSTALLMODE=14					√	√	
INSTALLMODE=15	√	√	√		√	√	
INSTALLMODE=16	√	√		√	√	√	
INSTALLMODE=17	√	√	√	√	√	√	
INSTALLMODE=18	√	√	√	√	√	√	√



CAUTION

Do not place spaces between the INSTALLMODE command and the equal sign, or between the equal sign and workstation code. If spaces are included, the command fails.

The following table lists the components for each INSTALLMODE component grouping:

Table 1-5 Components Included in each INSTALLMODE Component Grouping

Component Grouping	Components Included
AppXtender Document Manager	AppXtender Document Manager
AppXtender Scanner Support	AppXtender Image Capture BUIC Support Context Support ISIS Support Kofax Support TWAIN WIA Support Vidar Support
Administrator Utilities	AppXtender Archive AppXtender Full Text Index AppXtender Auto Index Import AppXtender Index Image Import AppXtender Key Reference Import AppXtender Migration AppXtender Move Online AppXtender Queue Manager AppXtender RM Admin
AppXtender AppGen	AppXtender AppGen
AppXtender Index Server	AppXtender Index Server Verity for AppXtender Gateway
Administrator Configuration	AppXtender Admin AppXtender User Profile Admin
Demo Database	Demo Database

Installation Directories

AppXtender Desktop Setup installs to the `C:\Program Files\XtenderSolutions\Content Management` directory by default. To change the default directory, use the `INSTALLDIR` command.

The format for the `INSTALLDIR` command is as follows:

```
INSTALLDIR="D:\AppXtender Desktop"
```

where `D:\AppXtender Desktop` is the drive and directory where you would like to install AppXtender Desktop.



CAUTION

Do not place spaces between the INSTALLDIR command and the equal sign, or between the equal sign and the installation directory. If spaces are included, the command does not work. In addition, you should always surround paths with quotation marks.

If you want to install AppXtender Desktop to the default directory of C:\Program Files\XtenderSolutions\Content Management, do not use the INSTALLDIR command.

Sample Unattended Setup Command Lines

Two sample command lines follow. They show possible combinations of command line syntax that can be used to install AppXtender Desktop via Unattended Setup.

Unattended Setup Command Line Syntax - Sample One

```
MsiExec.exe /I ApplicationXtender.msi /Q INSTALLMODE=18  
INSTALLDIR="D:\AppXtender Desktop" /L "C:\AxSetup.log"
```

All AppXtender Desktop components, including the Demo database, will be installed from the AppXtender Desktop Setup file. AppXtender Desktop will be installed at D:\AppXtender Desktop. No user interface will appear, and events are saved to the AxSetup.log file.

Unattended Setup Command Line Syntax - Sample Two

```
MsiExec.exe /I ApplicationXtender.msi /Q INSTALLMODE=1 /L  
"C:\AxSetup.log" /Q
```

Retrieval workstation components will be installed from the AppXtender Desktop Setup file. AppXtender Desktop will be installed to the default directory of C:\Program Files\XtenderSolutions\Content Management. No user interface will appear. Error messages will be appended to the log file located at C:\AxSetup.log.

Running Unattended Setup from the Command Line

Once you have composed your command line, you can run Unattended Setup from the command line.



CAUTION

Be sure to close all applications and save work in other applications before running Unattended Setup. If the computer needs to restart, it does so automatically.

To run Unattended Setup from the command line:

1. Close all open applications.
2. Obtain the installation files for AppXtender Desktop. You have the following choices:
 - Download the `Desktop_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. From the Windows Start menu, select Run. The Windows Run dialog box appears.
 - If you are a Windows 98 SE or Windows ME user, type `command` into the Open text box and click OK.
 - If you are a Windows 2000 user, type `cmd` into the Open text box and click OK.
4. The Windows command prompt appears.
5. Navigate to the `AppXtender Desktop` directory in the temporary directory or CD-ROM drive.
6. Enter an Unattended Setup command line. (For instructions on composing an Unattended Setup command line, see *Unattended Setup Command Line Syntax* on page 1-18. For command line samples, see *Sample Unattended Setup Command Lines* on page 1-22.)
7. Press Enter.

Configuration Overview

After you finish installing ApplicationXtender Desktop (AppXtender Desktop), consider each of the following:

- ◆ *Configuring the Data Source* on page 1-24
- ◆ *Installing Scanner Drivers* on page 1-24
- ◆ *Using the Demo Database* on page 1-25

Configuring the Data Source

After you have installed AppXtender Desktop, you must configure the data source. To configure the data source, use ApplicationXtender Administrator (AppXtender Admin) and ApplicationXtender Application Generator (AppXtender AppGen). For more information, refer to the *ApplicationXtender Core Components Administrator's Guide*.

After you have configured one or more data sources, you can use the AppXtender Data Source Selector to locate and select the data sources that have been created in AppXtender Admin. For information on using the AppXtender Data Source Selector, refer to the *ApplicationXtender Desktop User's Guide*.



CAUTION

All of the settings that you enter in the AppXtender Admin or Data Source Selector are stored in C:\Documents and Settings\All Users\Application Data\XSCM.CONFIG. Do not edit the contents of the XSCM.CONFIG file.

Installing Scanner Drivers

If you selected a scanner workstation type, you must install the appropriate drivers prior to scanning documents in AppXtender Document Manager or Image Capture. The AppXtender Desktop setup wizard installs the scanner support files only. Scanner drivers

are not shipped or installed with AppXtender Desktop, and must be installed separately.

Table 1-6 Scanner Drivers

AppXtender-supported Scanner	Components You Need to Install
Kofax-supported Scanners	<ul style="list-style-type: none"> • Kofax scanner support files (in AppXtender Desktop setup) • Kofax Image Controls (distributed with your Kofax card)
TWAIN-supported Scanners	<ul style="list-style-type: none"> • TWAIN scanner support files (in AppXtender Desktop setup) • TWAIN driver for your particular scanner (distributed with most scanners)
ISIS-supported Scanners	<ul style="list-style-type: none"> • ISIS scanner support files (in AppXtender Desktop setup) • ISIS driver for your particular scanner <hr/> <p>Contact technical support or your hardware provider for an ISIS scanner driver.</p> <hr/>
Vidar Scanners	<ul style="list-style-type: none"> • Vidar scanner support files (in AppXtender Desktop setup) • Vidar driver
Contex Scanners	<ul style="list-style-type: none"> • Contex scanner support files (in AppXtender Desktop setup) • Contex driver
BUIIC Scanners	<ul style="list-style-type: none"> • BUIIC scanner support files (in AppXtender Desktop setup) • BUIIC driver

Using the Demo Database

The Demo database is provided as an optional tool for new AppXtender users. The Demo database consists of the demonstration database files (such as AXDEMODB.MDB), the demonstration application image files, and the AppXtenderDEMO data source. The AppXtenderDEMO data source refers to a self-contained Microsoft Access database that allows you to perform various functions without affecting the actual system.

The demonstration applications (CHECKS, COLDAPP, CONADMIN, COUNTY, DOCS, HR, IMAGEAPP, MEDICAL, _FORMS, and _RSTAMP) have already been created. Directions on how to create new applications are provided in the *ApplicationXtender Core Components Administrator's Guide* or in AppXtender AppGen Online Help.

Your login procedure may vary depending on whether you have logged in before and depending on the security provider in use for the current data source. For information, see *Variations on Login Procedures* on page 1-28.

To use the Demo database:

1. From the Windows Start menu, select Programs > ApplicationXtender Desktop > AppXtender Data Source Selector. The AppXtender Data Source Selector appears, listing installed AppXtender data sources.

The AppXtenderDEMO data source appears in this list only if you selected the Custom installation type and chose to install the AppXtender Desktop Demo Database from the Select Features page of the Setup Wizard during the installation process (or if you chose an installation mode with Demo Database using `INSTALLMODE=18` during Unattended Setup). For information about installing the Demo Database component, see *Select Features Page* on page 1-12.

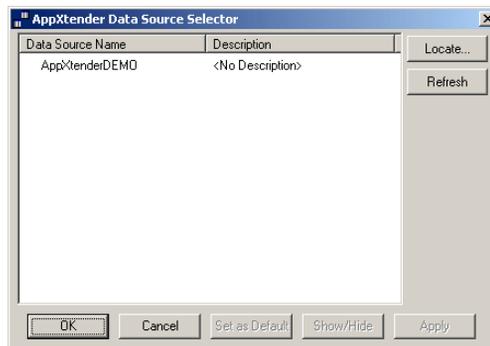


Figure 1-8 AppXtender Data Source Selector

2. Double-click AppXtenderDEMO to set it as default, or select AppXtenderDEMO and click Set as Default.
3. Click OK. The AppXtender Data Source Selector closes.
4. From the Windows Start menu, select Programs > ApplicationXtender Desktop > AppXtender Document Manager. The Login dialog box for AppXtender Desktop appears.

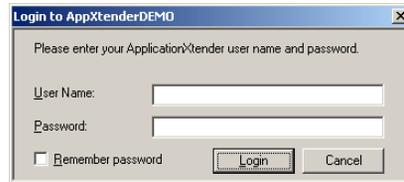


Figure 1-9 AppXtender Desktop Login Dialog Box

5. In the User Name text box, type a user name that is valid for the default data source.
6. In the Password text box, type the password for the user name you entered.

AppXtender Desktop opens with many applications, such as CHECKS, DOCS, and HR, created and populated with documents. (If your AppXtender Desktop user account has the Administrator privilege, the _FORMS and _RSTAMP applications also appear in the application list. These applications allow you to configure forms and rubber stamp annotations.) You can execute commands such as display and search. Images are already attached to documents in the application, so these commands are valid.

For information on how to create documents and perform other functions in AppXtender Desktop, refer to AppXtender Desktop Online Help or the *ApplicationXtender Desktop User's Guide* included with the purchase of AppXtender Desktop.

Variations on Login Procedures

The variations in login procedures depend on whether you have logged in before and depend on the security provider in use for the data source. The following table describes each variation:

Table 1-7 Variations in Login Procedures

Variation	Description
If this is the first time you are logging into a new AppXtender Desktop system	Use the default user name for the AppXtender system administrator: SYSOP. The initial password for the SYSOP user is xscm. The SYSOP user account has full privileges and cannot be deleted or modified. For security reasons, the password for this account should be changed to prevent administrative access by unauthorized users.
If this is a subsequent login	Enter the user name for an administrative account that has been created for the selected data source. This user account must have the Administrator privilege in AppXtender AppGen.
If the current data source is using the CM security provider	Passwords are <i>not</i> case-sensitive.
If the current data source is using the Windows security provider	When you attempt to start AppXtender software, your current Windows user account is checked for authentication and authorization. Depending on your profile, you might be automatically logged into the software without a Login dialog box. If you want the Login dialog box to appear, press [Shift] while you attempt to start the software and until the Login dialog box appears. You must precede the user name with a domain and a backslash. For example, typing CM\axadmin indicates the "axadmin" user on the "CM" domain. If you do not specify a domain, the result depends on your operating system. If you are using Windows 2000, the domain is taken from the currently logged on user account. If you are using Windows 98 SE or Windows ME, you will not be able to log in. Passwords <i>are</i> case-sensitive.

Table 1-7 Variations in Login Procedures (continued)

Variation	Description
If the current data source is using a directory service security provider	Depending on configuration in the LDAP directory service and in AppXtender Admin, you may need to specify user account information in multiple parts, separated by backslashes (\). The administrator who configures directory services in AppXtender Admin should distribute appropriate login instructions. For instructions on configuring directory services in AppXtender Admin, refer to the <i>ApplicationXtender Core Components Administrator's Guide</i> . Passwords are case-sensitive.
If the security provider for the selected data source has recently been changed in AppXtender Admin	After you click Login, a message appears indicating that the security provider for the current data source has been changed in AppXtender Admin. See Figure 1-10. Click Yes to complete the security provider switch or No to cancel. For more information on security providers, refer to the <i>ApplicationXtender Core Components Administrator's Guide</i> .
If the Remember Password option has been enabled in AppXtender Desktop or Image Capture	You are automatically logged in using your current user name and the same logon type that had been selected the last time.



Figure 1-10 Message Confirming Security Provider Switch

Configuring AppXtender Document Manager Workstations

With AppXtender Document Manager, many configuration options are available to accommodate individual workstation preferences. This chapter describes how to configure these options:

- ◆ Introduction 2-2
- ◆ Customizing the AppXtender Document Manager Window 2-3
- ◆ Configuring Toolbars, Title Bar, and Status Bar 2-4
- ◆ Customizing AppXtender Document Manager Views 2-9
- ◆ Data Sources 2-20
- ◆ Opening the Configuration Dialog Box..... 2-21
- ◆ View Tab 2-24
- ◆ Display Tab 2-28
- ◆ Fonts Tab 2-31
- ◆ Scan Tab 2-35
- ◆ COLD Tab..... 2-38
- ◆ Print Tab 2-41
- ◆ E-Mail Tab 2-46
- ◆ Export Tab 2-53
- ◆ File Types Tab 2-58
- ◆ Data Tab..... 2-60
- ◆ Paths Tab 2-70
- ◆ Full Text Tab..... 2-73
- ◆ OCR Tab..... 2-76
- ◆ Fax-in Tab 2-82
- ◆ Thumbnail Tab..... 2-84
- ◆ Document Signing Tab 2-86
- ◆ Workflow Tab..... 2-90
- ◆ Saving and Loading Settings..... 2-91

Introduction

As the AppXtender system administrator, you must consider the following aspects of workstation configuration:

- ◆ You (or the user) can adjust the layout of the AppXtender Document Manager window and the behavior of the AppXtender Document Manager views. You can also customize toolbar display and settings. For instructions, see *Customizing the AppXtender Document Manager Window* on page 2-3.
- ◆ You control the level of access that the users on your AppXtender system have to functionality on their AppXtender Document Manager workstations. You can allow users to configure all aspects of AppXtender Document Manager functionality on their individual workstations, or you can restrict configuration rights and only allow configuration of options relating to the display of information in AppXtender Document Manager. For instructions, see *Opening the Configuration Dialog Box* on page 2-21 and the topics for each tab.
- ◆ To simplify AppXtender system deployment, AppXtender Document Manager provides Save Settings and Load Settings features that allow you to copy workstation settings from one Document Manager workstation to another. You (or the user) customize all aspects of an Document Manager workstation configuration for a single computer, and then save the settings using the Save Settings feature. To copy the saved configuration to other workstations, you simply load the saved settings file on each workstation, and all of the saved configuration settings are applied. By going through each of the configuration and customization options described in this chapter, you can set most of the options that can be saved as workstation settings. For detailed instructions and for a list of the settings that are saved, see *Saving and Loading Settings* on page 2-91.

Information in this chapter about AppXtender Document Manager also applies to AppXtender Image Capture, except where noted.

Customizing the AppXtender Document Manager Window

You can set up the AppXtender Document Manager window for your users and copy it from one AppXtender Document Manager workstation to other AppXtender Document Manager workstations. By customizing window settings, you can set up the AppXtender environment in the way that you think would be most productive for the users on your AppXtender system. You can customize both toolbar settings and view settings. Any adjustments that you make to the contents, locations, and display settings of the toolbars, and the location and display settings of the Application view, Query view, Thumbnail view, or AppXtender Workflow Workbox can be copied to another AppXtender Document Manager workstation by saving and loading settings. For a detailed description of what options are saved, see *Saving and Loading Settings* on page 2-91.

The AppXtender Workflow Workbox view is available only if the AppXtender Workflow client (Workbox) is installed on the AppXtender Document Manager workstation. The Query view, Thumbnail view, and AppXtender Workflow Workbox are not available in AppXtender Image Capture.

Configuring Toolbars, Title Bar, and Status Bar

In AppXtender Document Manager, you can customize the toolbars, the Document Display or Batch Display view title bar, and the status bar to meet your needs. For instructions, see the following topics:

- ◆ *Displaying or Hiding a Toolbar* on page 2-4
- ◆ *Changing the Size of Toolbar Buttons* on page 2-5
- ◆ *Customizing Toolbars* on page 2-5
- ◆ *Configuring the Title Bar* on page 2-6
- ◆ *Displaying or Hiding the Status Bar* on page 2-8

The following table briefly describes the functions available on each toolbar:

Table 2-1 AppXtender Document Manager Toolbars

Toolbar	Description
Main	The Main toolbar provides shortcuts to common AppXtender commands such as print, scan, query, and configure. These commands can be executed by clicking the buttons on the toolbar, eliminating the series of steps necessary when using the pull down menus.
Annotation	The Annotation toolbar contains shortcuts to the annotation features, such as select, save, delete, and create.
Image	The Image toolbar provides shortcuts for manipulating images. Some of the buttons available are pan mode, process a page using OCR, show index value, rotating, and zooming.
Script	The Script toolbar provides shortcuts for up to 20 script-based functions. To activate the buttons on this toolbar, your system administrator must create a file named AEX32.TXT containing a script that assigns AppXtender functions to the Script toolbar buttons. The AppXtender Software Developer Kit (AppXtender SDK) provides documentation on AppXtender scripting. (The Script toolbar is not available in AppXtender Image Capture.)
Batch Index	The Batch Index toolbar provides shortcuts to the batch indexing feature. From the Batch Index toolbar, you can create new documents and pages from a batch, delete a page from a batch, and navigate from page to page in a batch or document. (The Batch Index toolbar is not available in AppXtender Image Capture.)
Scan	The Scan toolbar contains shortcuts for scanning options and configuration settings such as manual feed, auto feed, single feed, rescan, and different automatic-rotation options.

Displaying or Hiding a Toolbar

AppXtender Document Manager toolbars can be shown or hidden from view. All AppXtender features are always available from

menus, even if the toolbar is hidden. Toolbars can be removed to create more space for displaying documents.

To display or hide a toolbar:

1. From the View menu, select Toolbars. In the Toolbars submenu, the name of each displayed toolbar has a check mark next to it.
2. In the Toolbars submenu, click the name of the toolbar you want to display or hide. If the toolbar you selected was previously displayed, it is now hidden. If the toolbar you selected was previously hidden, it is now displayed.

Changing the Size of Toolbar Buttons

The default size of AppXtender Document Manager toolbar buttons may be too small for some users. You can change the size of AppXtender Document Manager toolbar buttons, if necessary.

To make small toolbar buttons larger:

1. From the View menu, select Toolbars. In the Toolbars submenu, a check mark indicates the current button size setting.
2. If Small Icons are enabled, in the Toolbars submenu, click Large Icons. The buttons increase in size.

To make large toolbar buttons smaller:

1. From the View menu, select Toolbars. In the Toolbars submenu, a check mark indicates the current button size setting.
2. If Large Icons are enabled, in the Toolbars submenu, click Small Icons. The buttons decrease in size.

Customizing Toolbars

Any AppXtender Document Manager toolbar can be customized to meet your needs. Buttons can be deleted from the toolbar, added to the toolbar, or re-ordered.

To customize a toolbar:

1. Right-click the toolbar to be customized. From the shortcut menu that appears, select Customize. The Customize Toolbar dialog box appears.

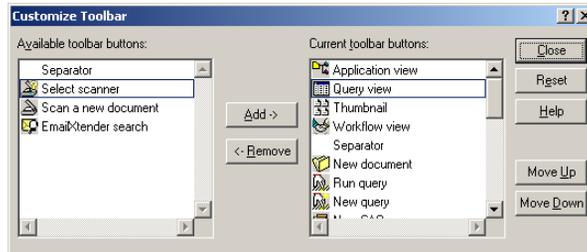


Figure 2-1 Customize Toolbar Dialog Box

2. You have several choices:
 - Remove buttons from the toolbar by double-clicking the button name in the Current toolbar buttons list or by selecting the button name and clicking Remove.
 - Add buttons to the toolbar by double-clicking the button name in the Available buttons list or by selecting the button name and clicking Add.
 - Re-order buttons by selecting a button name in the Current toolbar buttons list and clicking Move Up or Move Down or by dragging the button name to the new location.
 - Reset to a pre-defined list of toolbar buttons by clicking Reset.
3. After you have completed customizing the toolbar, click Close.

Configuring the Title Bar

When documents are displayed in the Document Display view, information about each document appears in the Document Display view title bar, including a value for each document from one of its index fields. If a document window is maximized in the Document Display view, this information appears in the title bar for the main AppXtender Document Manager window.

Similarly, when a batch is displayed in the Batch Display view, information about that batch appears in the Batch Display view title bar, including the name specified for the batch when it was created.

For each application, you can specify which index field is used to populate the title bar. You can also configure the title bar to display the name of the AppXtender data source that contains the document, the name of the application that contains the document, or both for each application.

To configure the Document Display view title bar:

1. In the Applications view, right-click the application for which you want to configure the Document Display view title bar. From the shortcut menu that appears, select Properties. The Properties dialog box for that application appears.
2. Select the Title tab.

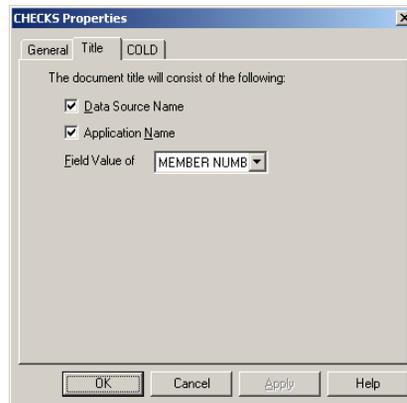


Figure 2-2 Properties Dialog Box: Title Tab

3. Specify whether you want the name of the AppXtender data source to appear in the Document Display view title bar. You have the following choices:
 - To include the name of the AppXtender data source, enable the Data Source Name check box.
 - To leave out the name of the AppXtender data source, clear the Data Source Name check box.
4. Specify whether you want the name of the application to appear in the Document Display view title bar. You have the following choices:
 - To include the name of the application, enable the Application Name check box.

- To leave out the name of the application, clear the Application Name check box.
5. In the Field Value of drop-down list, select the name of the index field that you want to include in the Document Display view title bar.
 6. Save your changes. You have the following choices:
 - To save changes and keep the Properties dialog box open, click Apply.
 - To save changes and close the Properties dialog box, click OK.

The next time you display a document, the Document Display view title bar reflects your changes.

Displaying or Hiding the Status Bar

The status bar appears at the bottom of the AppXtender Document Manager window and contains each of the following from left to right:

- ◆ Help messages for AppXtender Document Manager functions, describing toolbar button functions and menu item functions
- ◆ The name of the active application
- ◆ The page number of the currently displayed page
- ◆ The total number of pages in the currently displayed document
- ◆ The version number of the currently displayed version
- ◆ The total number of versions in the currently displayed page

The AppXtender Document Manager status bar can be removed from the window to save space for the Document Display view.

To display or hide the status bar:

1. Click the View menu. In the View menu, the Status Bar command has a check mark next to it if the status bar is currently displayed.
2. From the View menu, select Status Bar. If the status bar was previously displayed, it is now hidden. If the status bar was previously hidden, it is now displayed.

Customizing AppXtender Document Manager Views

The Applications, Query, Workflow, and Thumbnail views can be modified to set up the AppXtender Document Manager window according to the user's needs. By changing the way AppXtender Document Manager views display, you can customize the AppXtender Document Manager window.

The Applications, Query, Workflow, and Thumbnail views can each be configured to appear as a docked view, as a dialog box, or as a subwindow. The Applications view and the Query view can also be configured to "hide on use."

The AppXtender Workflow Workbox view is available only if the AppXtender Workflow client is installed on the AppXtender Document Manager workstation. The Query view, Thumbnail view, and AppXtender Workflow Workbox are not available in AppXtender Image Capture.

For more information, see the following topics:

- ◆ *Docking a View* on page 2-9
- ◆ *Displaying a View as a Dialog Box* on page 2-11
- ◆ *Displaying a View as Subwindow* on page 2-12
- ◆ *Hiding a View on Use* on page 2-13
- ◆ *Activating AppXtender Document Manager Full Screen Mode* on page 2-14
- ◆ *Managing the Query View Result Set* on page 2-14

Docking a View

An AppXtender Document Manager docked view has a grab bar. A grab bar is similar to a title bar except that it does not contain a title.



Figure 2-3 AppXtender Document Manager Docked View Grab Bar

You can drag the view to the left, right, top, or bottom of the AppXtender Document Manager window by dragging this bar. A docked view automatically aligns with the AppXtender Document Manager window borders and cannot be moved beyond the borders.

By default, the Applications, Query, Workflow, and Thumbnail views appear as docked views.

The AppXtender Workflow Workbox view is available only if the AppXtender Workflow client is installed on the AppXtender Document Manager workstation. The Query view, Thumbnail view, and AppXtender Workflow Workbox are not available in AppXtender Image Capture.

The following procedure applies to only the Applications, Query, Workflow, and Thumbnail views. It does not apply to the Document Display view or the Index view.

To dock a view that is now a dialog box:

1. Right-click inside the dialog box. From the shortcut menu that appears, select Allow Docking. Allow Docking can be toggled on or off.
2. Click the grab bar, and drag the view to the desired position on the AppXtender Document Manager window. For the view to dock, you must drag it to the left, right, top or bottom edge of the AppXtender Document Manager window. When you release the mouse button, the view moves to that location.

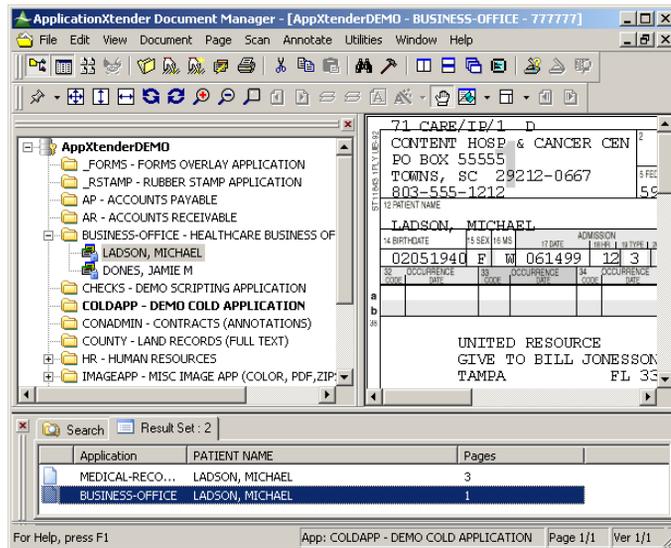


Figure 2-4 AppXtender Document Manager Window with Docked Views

Displaying a View as a Dialog Box

An AppXtender Document Manager dialog box has a title bar with a Close button. You can drag the view to a different location on your window by dragging the title bar. A dialog box is independent of the AppXtender Document Manager window borders. That is, it can be moved away from the AppXtender Document Manager window borders, in any direction. This behavior is often described as "floating."



Figure 2-5 AppXtender Document Manager Dialog Box Title Bar

The AppXtender Workflow Workbox view is available only if the AppXtender Workflow client is installed on the AppXtender Document Manager workstation. The Query view, Thumbnail view, and AppXtender Workflow Workbox are not available in AppXtender Image Capture.

The following procedure applies to only the Applications, Query, Workflow, and Thumbnail views. It does not apply to the Document Display view or the Index view.

To display a view as a dialog box:

1. Double-click the grab bar. The docked view becomes a dialog box.
2. Click the Title bar and drag the dialog box to the desired location on the AppXtender Document Manager window.

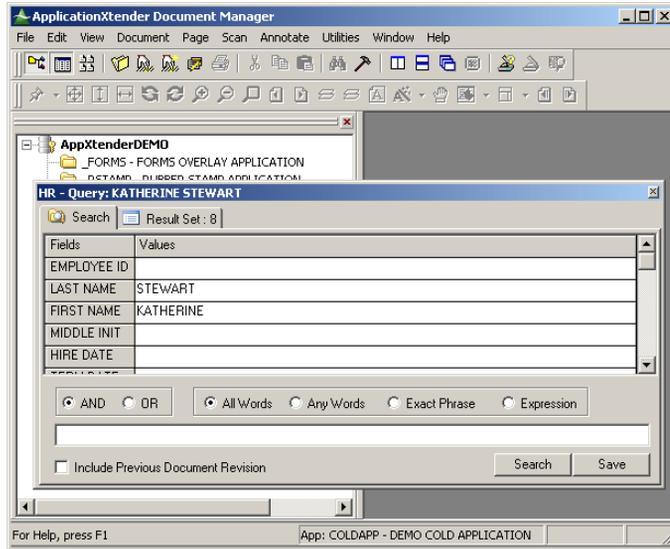


Figure 2-6 AppXtender Document Manager Window with Query View as Dialog Box

Displaying a View as Subwindow

An AppXtender Document Manager subwindow has a title bar with Minimize, Maximize, and Close buttons. You can drag the view to a different location in the AppXtender Document Manager window by dragging the title bar. A subwindow is independent of the AppXtender Document Manager window borders but cannot be moved beyond them. This behavior is often described as "floating as an MDI window."



Figure 2-7 AppXtender Document Manager Subwindow Title Bar

The AppXtender Workflow Workbox view is available only if the AppXtender Workflow client is installed on the AppXtender Document Manager workstation. The Query view, Thumbnail view, and AppXtender Workflow Workbox are not available in AppXtender Image Capture.

The following procedure applies to only the Applications, Query, Workflow, and Thumbnail views. It does not apply to the Document Display view or the Index view.

To display a view as a subwindow:

1. Right-click in the docked view or view dialog box. From the shortcut menu that appears, select Float as MDI Window.
2. Click the Title bar and drag the subwindow to the desired location on the AppXtender Document Manager window.

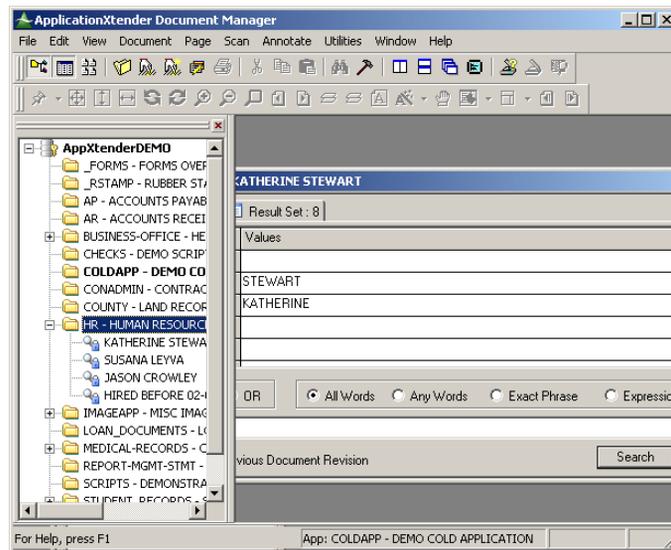


Figure 2-8 AppXtender Document Manager Window with Query View as Subwindow

Hiding a View on Use

By default, the views remain in the AppXtender Document Manager window until you close, or hide, them. That is, when you display the Query View, the Applications View remains. Also, when you display a document, the Query View remains. You can configure the Applications view to hide when you display the Query View, and you can configure the Query View to hide when you display a document.

Similarly, by default, the views remain in the AppXtender Image Capture window until you close or hide them, which means, when you display the Batch List, the Applications View remains. You can configure the AppXtender Image Capture Applications view to hide when you display the Batch List.

This is described as "hiding on use" because you *use* the Applications view to display the Query View and you *use* the Query View to display a document. When a view is configured to hide on use, this configuration is often described as "hide on use mode." In this mode, AppXtender Document Manager or Image Capture automatically hides the view after items have been selected.

You can always display the hidden view using the Applications View button or the Query View button on the Main toolbar. The hide on use mode can be used on a view whether it displays as a docked view, as a dialog box, or as a subwindow.

The following procedures apply to only the Applications view and the Query view. They do not apply to the Document Display, Index, Workflow, or Thumbnail view.

To configure a docked view to hide on use:

- ◆ Right-click the view's grab bar. From the shortcut menu that appears, select Hide on Use.

To configure a dialog box or subwindow to hide on use:

- ◆ Right-click inside the dialog box or subwindow. From the shortcut menu that appears, select Hide on Use.

Activating AppXtender Document Manager Full Screen Mode

The Full Screen feature allows you to expand AppXtender Document Manager to fill the entire monitor screen. This feature allows you to maximize AppXtender Document Manager viewing.

This feature is not available in AppXtender Image Capture.

To enable/disable full screen:

- ◆ From the View menu, select Full Screen.

Managing the Query View Result Set

After you search for a document, the Query view Result Set tab displays the document index records that met the search criteria you entered. There is a column for each field in the result set. You can

control the display of columns from the Result Set. For example, you can show or hide, reorder, or save columns from the Result Set. For more information, see the following topics:

- ◆ *Changing the Way the Result Set Lists Documents* on page 2-15
- ◆ *Hiding or Showing Result Set Columns* on page 2-16
- ◆ *Sorting the Result Set* on page 2-17
- ◆ *Reordering the Result Set Columns* on page 2-17
- ◆ *Resizing the Result Set Columns* on page 2-18
- ◆ *Saving the Result Set Columns* on page 2-18
- ◆ *Resetting Result Set Column Configuration* on page 2-18
- ◆ *Collapsing the Result Set* on page 2-18

The Query view is not available in AppXtender Image Capture.

Changing the Way the Result Set Lists Documents

You can change the way the Result Set lists your documents.

To change the way the Result Set lists your documents:

1. Right-click the Result Set. From the shortcut menu that appears, select View As. Another shortcut menu appears.
2. You have the following choices:
 - To display only the first index field of each record and a small folder icon next to each record, select Names.

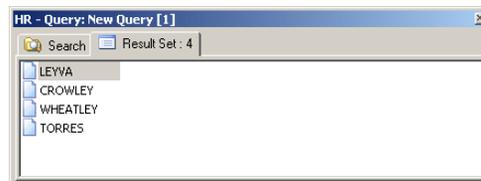
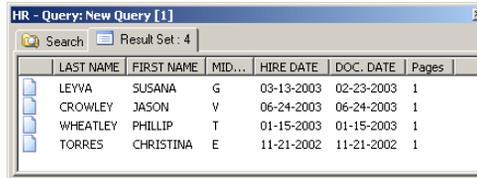


Figure 2-9 Displaying Names in the Result Set

- To display all index fields and a small folder icon next to each record, select Details.



LAST NAME	FIRST NAME	MID...	HIRE DATE	DOC. DATE	Pages
LEYVA	SUSANA	G	03-13-2003	02-23-2003	1
CROWLEY	JASON	V	06-24-2003	06-24-2003	1
WHEATLEY	PHILLIP	T	01-15-2003	01-15-2003	1
TORRES	CHRISTINA	E	11-21-2002	11-21-2002	1

Figure 2-10 Displaying Details in the Result Set

- To display only the first index field of each record and a large folder icon above each record, select Folders.



Figure 2-11 Displaying Folders in the Result Set

Hiding or Showing Result Set Columns

The first time you log into an AppXtender application, the Result Set tab displays a column for each of the index fields in the application, plus a column for the number of pages in each document. You can hide any of these columns. There is also a column for the document ID, which is hidden by default. You can configure this column to appear in the Result Set.

To hide or show a column:

1. Right-click a column heading in the Result Set. From the shortcut menu that appears, select Settings. The List Column Editor dialog box appears.

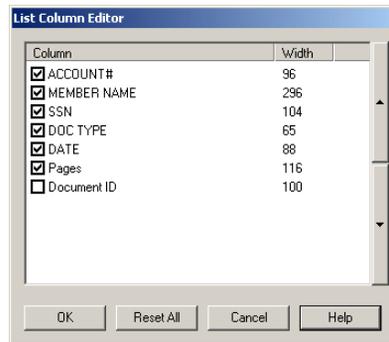


Figure 2-12 List Column Editor Dialog Box

2. Click the check box next to the name of the column that you want to hide or show.
3. When each column that you want to hide has no check mark and each column that you want to show has a check mark, click OK.

Sorting the Result Set

Ascending or descending sorts can be performed on any index column listed in the Result Set tab. To sort a field in ascending order, click the column heading of the desired field. To sort a field in descending order, click the column heading of the field again.

In addition, your workstation may be configured to sort the result set automatically based on the last column selected or based on the document ID. The Display tab of the Configuration dialog box allows this configuration. For information, see *Use KeyView to Display Foreign Files* on page 2-26.

Reordering the Result Set Columns

The first time you log into an AppXtender application, the Result Set tab displays columns in a default order. You can change the order of these columns.

To move a column:

- ◆ Drag the column to the position you want to use.

Resizing the Result Set Columns

The first time you log into an AppXtender application, the Result Set tab displays default column widths for each index field. These column widths are resizable. Because the data is truncated in narrow columns, resizing is a useful display tool.

To resize a column width:

1. Drag the boundary between column headings to the position you want.
2. Right-click the column headings. From the shortcut menu that appears, select Save Columns. The column configuration is saved for the current user name and application.

Saving the Result Set Columns

You can save Result Set column configuration changes for the current user name and application.

To save column settings:

- ◆ Right-click any column heading in the Result Set. From the shortcut menu that appears, select Save Columns. The column configuration is saved for the current user name and application.

Resetting Result Set Column Configuration

If you have made changes to the way columns appear in the Result Set (such as hiding columns, showing the Document ID column, changing the column order, or changing the column width) you can set them back to their default configuration.

To reset Result Set columns:

1. If you have your View As option set to Folders or Names, you must first change that option to Detail. For instructions, see *Changing the Way the Result Set Lists Documents* on page 2-15.
2. Right-click any of the Result Set column headings. From the shortcut menu that appears, select Settings. The List Column Editor dialog box appears.
3. Click Reset All.

Collapsing the Result Set

You can collapse the Result Set to display only those documents that you select.

To collapse the Result Set:

1. In the Result Set tab, select the documents you want to view in the Result Set. You have the following choices:
 - If you want to select only one document, click the document.

- If you want to select multiple documents in consecutive order, hold down [SHIFT] and click the first and last document.
 - If you want to select multiple documents that are not in consecutive order, hold down [CTRL] and select each document individually.
2. Right-click within the Result Set. From the shortcut menu that appears, select Collapse. Only the documents you selected are listed in the Result Set tab.

Data Sources

One aspect of configuring the AppXtender Document Manager window is the selection of data sources. You can use the AppXtender Data Source Selector to specify the default data source for AppXtender AppGen and the three import wizards. You can also use the AppXtender Data Source Selector to select multiple data sources for display in AppXtender Document Manager. For instructions, refer to the *ApplicationXtender Document Manager User's Guide*.

When you set an application as the "active" application within AppXtender Document Manager, the data source that contains that application also becomes active. Setting a data source as active within AppXtender Document Manager is not the same as setting a data source as default in the AppXtender Data Source Selector or Queue Manager. For instructions on setting an application (and its data source) as active, refer to the *ApplicationXtender Document Manager User's Guide*.

When you save AppXtender Document Manager workstation settings, each of these settings is saved:

- ◆ Default data source
- ◆ Selected data sources
- ◆ Active data source

For instructions on saving AppXtender Document Manager workstation settings, see *Saving Settings* on page 2-91.

Opening the Configuration Dialog Box

As the AppXtender system administrator, you control the level of access that the users on your AppXtender system have to functionality on their AppXtender Document Manager workstations. You can allow users to configure all aspects of AppXtender Document Manager functionality on their individual workstations, or you can restrict configuration rights and only allow configuration of options relating to the display of information in AppXtender Document Manager.

If the Configure WS privilege is enabled in a user's security profile, the user has access to all AppXtender Document Manager configuration options. If it is disabled, you can set configuration options and the user cannot access the configuration tabs to change those options.

The *ApplicationXtender Document Manager User's Guide* and the *ApplicationXtender Image Capture User's Guide* include information on the configuration options that are available to users regardless of their security settings. This chapter contains information relating to the more advanced configuration options.

- ◆ Each AppXtender Document Manager workstation has a Configuration dialog box, accessible through AppXtender Document Manager, which can be used to customize the behavior of AppXtender Document Manager on the workstation.
- ◆ Each AppXtender Image Capture workstation also has a Configuration dialog box, accessible through AppXtender Image Capture, which can be used to customize the behavior of AppXtender Image Capture on the workstation.

Many configuration options are available to accommodate individual operational needs. Some of the options on the AppXtender Document Manager Configuration dialog box are not available on the AppXtender Image Capture Configuration dialog box, because they configure features that are not necessary in AppXtender Image Capture.

Some configuration options are cosmetic and do not alter the way the system performs, such as options controlling the look and feel of the main screen. Others are integral to the functionality of AppXtender Document Manager, such as a default digital certificate; the file types and formats that AppXtender Document Manager use; and interface

options for e-mail, fax server, and optical character recognition (OCR) packages.

This topic explains the configuration options available in AppXtender Document Manager, including: export formats, font types for text, COLD/ERM display settings, display zoom default, OCR settings, full-text settings, and various other AppXtender system settings.

System defaults are in place for most features, such as zoom and tile. These defaults can be changed in the Configuration dialog box. Changes that you make to the options in the Configuration dialog box are saved when you save workstation settings. For a detailed description of what options are saved, see *Saving and Loading Settings* on page 2-91.

To open the Configuration dialog box:

1. From the File menu, select Configuration. The Configuration dialog box appears.
2. Set the desired options according to the instructions in the following topics:
 - *View Tab* on page 2-24
 - *Display Tab* on page 2-28
 - *Fonts Tab* on page 2-31
 - *Scan Tab* on page 2-35
 - *COLD Tab* on page 2-38
 - *Print Tab* on page 2-41
 - *E-Mail Tab* on page 2-46
 - *Export Tab* on page 2-53
 - *File Types Tab* on page 2-58
 - *Data Tab* on page 2-60
 - *Paths Tab* on page 2-70
 - *Full Text Tab* on page 2-73
 - *OCR Tab* on page 2-76
 - *Fax-in Tab* on page 2-82
 - *Thumbnail Tab* on page 2-84
 - *Document Signing Tab* on page 2-86
 - *Workflow Tab* on page 2-90

3. Click OK. The Configuration dialog box closes and any changes you have made are saved.

View Tab

The View tab of the Configuration dialog box allows you to configure several aspects of viewing documents and batches. Some of the options on the AppXtender Document Manager Configuration dialog box View tab are not available on the AppXtender Image Capture Configuration dialog box View tab, because they configure features that are not necessary in AppXtender Image Capture.

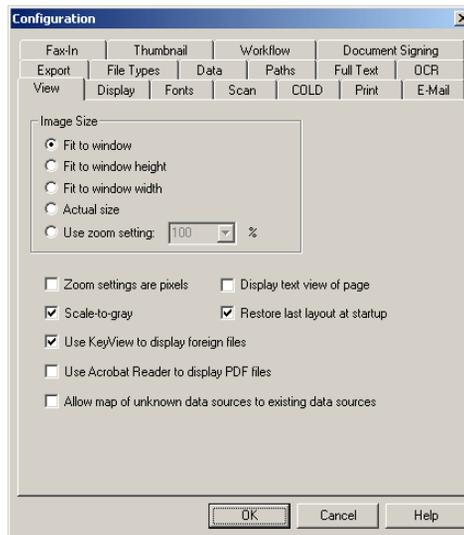


Figure 2-13 Configuration Dialog Box: View Tab

Image Size Options

Image Size options control the default display size of images displayed in AppXtender Document Manager or Image Capture. You can use these options with all supported image types. (In AppXtender Document Manager, these options also apply to text when the Allow zoom option is enabled on the COLD tab of the Configuration dialog box.)

To change the default image size setting:

1. In the Configuration dialog box, select the View tab.
2. Under Image Size, select one of the five zoom settings.

These settings are explained in the following table:

Table 2-2 Image Size Options

Option	Description
Fit to window	If this option is chosen as the default, AppXtender Document Manager displays images to fit the display window either top to bottom or left to right, while maintaining the original aspect ratio of the image and displaying the entire image.
Fit to window height	If this option is chosen as the default, AppXtender Document Manager displays images to fit the window from top to bottom. You might need to scroll left or right to see the sides of the image.
Fit to window width	If this option is chosen as the default, AppXtender Document Manager displays images to fit the window from left to right. You might need to scroll up or down to see the top or bottom of the image.
Actual size	If this option is chosen as the default, AppXtender Document Manager displays images as actual size (one pixel stored is equal to one pixel on the monitor).
Use zoom setting	If this option is chosen as the default, AppXtender Document Manager displays images using the default zoom percent. The Use Zoom Setting drop-down list allows you to set the default ratio.

3. If you have enabled the Use zoom setting radio button, select the desired ratio. You can click the User zoom setting drop-down list and select the desired ratio (standard options range from 25% to 400%) or type the preferred percentage in the text box.
4. Click OK to save the settings.

Zoom Settings are Pixels

By default, AppXtender Document Manager takes into consideration both the image resolution and monitor resolution when rendering images for display. By enabling the Zoom settings are pixels option, AppXtender Document Manager displays images in raw pixel size, disregarding image and monitor resolution.

Scale-to-Gray

When the Scale-to-gray option is enabled, AppXtender Document Manager displays bi-tonal (black and white) images as grayscale, which is frequently a more legible format. Various shades are used to convert black and white images for the highest readability. This option applies to bi-tonal images only.

Display Text View of Page

AppXtender Document Manager allows users to process images using OCR, creating an alternate "text view" of the image. Users can

switch between the original image and the text view of the image at will. The Display text view of page option sets the default document display to text format or image format. When the check box is enabled on the View tab of the Configuration dialog box, AppXtender Document Manager displays documents as text when applicable. If no OCR view is available, the page will be automatically processed using OCR to create an OCR view when it is viewed. When the check box is disabled, AppXtender Document Manager always displays documents in image format. (This option is not available in AppXtender Image Capture.)

Restore Last Layout at Startup

If the Restore last layout at startup option is enabled on the View tab of the Configuration dialog box, the AppXtender Document Manager window layout is automatically saved when you exit AppXtender Document Manager. This includes the following settings:

- ◆ AppXtender Document Manager window size and location
- ◆ Toolbar locations and toolbar button size
- ◆ View type (docked view, dialog box, or subwindow) for the Applications, Query, Workflow, and Thumbnail views
- ◆ Location and size of the Applications, Query, Workflow, and Thumbnail views

If this option is disabled, the window layout is not saved on exit. When you open AppXtender Document Manager, the window layout reverts to the previously saved settings.

Use KeyView to Display Foreign Files

When this option is enabled, AppXtender Document Manager uses the Verity KeyView Viewer technology to display the contents of various foreign files. The appearance of a foreign file in KeyView is similar to its appearance in its native viewer, but not exactly the same. For a list of Verity KeyView Viewer-supported file types, refer to the "Creating Documents" chapter of the *ApplicationXtender Document Manager User's Guide*. When this option is disabled, AppXtender Document Manager displays a foreign file page as an icon.

Use Acrobat Reader to Display PDF Files

When this option is enabled, AppXtender Document Manager uses the Acrobat Reader technology to display the contents of PDF files. When this option is disabled, AppXtender Document Manager uses PDF Library to display each PDF page. If you enable the option for

AppXtender Document Manager or Image Capture, it is enabled for both.

If you choose to display a PDF document in Acrobat Reader, you cannot annotate the pages and full-text search hits on the PDF pages will not be highlighted. However, the PDF Library performs document printing of a PDF page regardless of the view setting.

Allow Map of Unknown Data Sources to Existing Data Sources

When this option is enabled, AppXtender Document Manager will allow you to specify a data source for a document for which the data source is unknown. The original data source may be unknown if you are opening a document that has been somehow saved to your computer or if a reference to an AppXtender document has been e-mailed to you. If the name of the data source listed in the reference is named different from the data sources that are configured on your computer and you attempt to open the file, the Pick a Data Source dialog box will appear, allowing you to specify the correct data source to use. For more information about selecting a data source from the Pick a Data Source dialog box, refer to the *ApplicationXtender Document Manager User's Guide*. (This option is not available in AppXtender Image Capture.)

Display Tab

The Display tab of the Configuration dialog box contains options for various AppXtender Document Manager display features. Some of the options on the AppXtender Document Manager Configuration dialog box Display tab are not available on the AppXtender Image Capture Configuration dialog box Display tab because they configure features that are not available in AppXtender Image Capture.

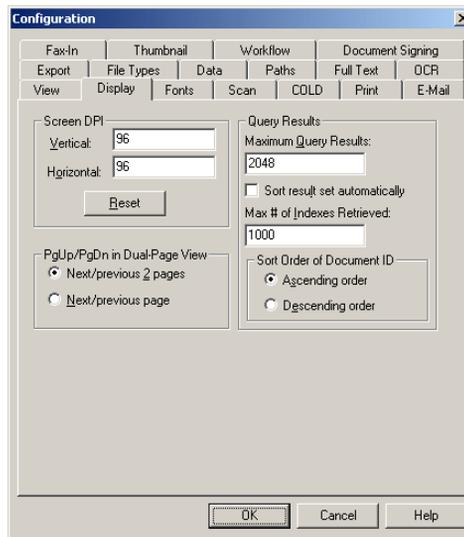


Figure 2-14 Configuration Dialog Box: Display Tab

Screen DPI

The Screen DPI settings refer to the dots per inch of the system monitor. AppXtender Document Manager takes this information from the video interface card installed with the system. You can overwrite the defaults by entering new Horizontal or Vertical settings. If you want to change the Horizontal or Vertical settings back to the defaults from the video interface card, click Reset.

PgUp/PgDn in Dual-Page View

This option dictates how the [PAGE UP] and [PAGE DOWN] keys operate in AppXtender Document Manager when a document or batch is in dual-page display mode. This mode is also known as Split View. The Split View feature splits the Document Display view or the Batch Display view so that multiple pages of the same document or batch are displayed.

In Split View, the actions performed by your [PAGE UP] and [PAGE DOWN] keys depend on the PgUp/PgDn in Dual-Page View setting in the Display tab:

- ◆ When you select Next/previous 2 pages, the keys page through two pages at a time. For example, if you display a document or batch with four pages in Split View, pages 1 and 2 appear first, then pages 3 and 4.
- ◆ When you select Next/previous page, the keys page through one page at a time. For example, if you display a document or batch with four pages in Split View, pages 1 and 2 appear first, then pages 2 and 3.

Query Results

The Query Results options allow you to configure the maximum number of documents that will be included in a result and how the result set will be sorted. (These options are not available in AppXtender Image Capture.)

Maximum Query Results

Using the Maximum Query Results option, you can set the maximum number of documents that will be included in a result set. The default is 2048 documents. The higher this value is set, the larger the result set can be. If a query returns more documents than the maximum number, the result set will be truncated.

Sort Result Set Automatically

This option sets the default to automatically sort index records displayed in the query result set based on the column field selected. When this option is enabled on the Display tab of the Configuration dialog box, the new query displayed in the result set is sorted by the last column field selected. When this option is disabled, AppXtender Document Manager displays the index records in the query result set based on one of the two Sort Order of Document ID options specified in the Sort Order of Document ID topic. For more information, see *Sort Order of Document ID* on page 2-30.

Automatic sort overrides sort order of document ID.

Maximum Index Retrieved

If the application in which you are searching has the Multiple indexes referencing single document setting enabled, the result set may contain more than one record for each document. For example, if the Maximum Query Results value on the Display tab in the Configuration dialog box is set to 2048 documents, your result set may contain more than 2048 index records. To improve performance,

you can use the Maximum Index Retrieved setting to limit the number of index records that are listed in the result set.

The default setting is 1000 index records. The higher the value, the larger the result set can be. If a query returns more index records than the maximum number, the result set is truncated.

Sort Order of Document ID

This feature lets you control the display of items in the query result set. When Ascending order is enabled, AppXtender Document Manager displays index records listed in the query result set by ascending chronological order. Enabling the Descending order sorts the documents in reverse chronological order.

Ascending Order

This option sets the sort order of the query result set in ascending chronological order, based on the document ID number. If this option is chosen as the default, AppXtender Document Manager displays index records sequentially, from low to high, in the query view.

Descending Order

This option sets the sort order of the query result set to descending chronological order, based on the document ID number. If this option is chosen as the default, AppXtender Document Manager displays index records sequentially, from high to low, in the query view.

Fonts Tab

Using the Fonts tab of the Configuration dialog box, you can choose the fonts for displaying and printing text documents.



Figure 2-15 Configuration Dialog Box: Fonts Tab

For more information, see:

- ◆ *Opening the Configuration Dialog Box* on page 2-21
- ◆ *Screen Fonts* on page 2-31
- ◆ *Printer Fonts* on page 2-32
- ◆ *Simulate Box Drawing Characters* on page 2-34

Screen Fonts

The font used for text display depends on whether the page has a text overlay, an image overlay, or no overlay at all. It also depends on whether the user is allowed to zoom in on the page.

Zoom is configured using the Allow zoom setting on the COLD tab. For more information on configuring Allow zoom, see *Allow Zoom* on page 2-39.

Using the Screen Fonts setting, you can configure the fonts used for text display.

To set the screen fonts:

1. Select the font to configure from the Screen Fonts list. You have the following choices:
 - Page (fixed size)
 - Page (variable size)
 - Image Form Overlay

The font that you select depends on whether the text page has a text or image overlay and whether zoom is enabled. The following table describes which font is used for text display in each scenario:

Table 2-3 Configuring Screen Fonts with Form Overlay

Page Type	When Zoom is Enabled	When Zoom is Disabled
Text with no overlay	Page (variable size)	Page (fixed size)
Text with a text overlay	Page (variable size)	Page (fixed size)
Text with an image overlay	Image Form Overlay	Image Form Overlay

2. Click Change. The Font dialog box appears.

AppXtender supports only fixed pitch fonts. The fonts that are displayed are the only fixed pitch fonts currently on your computer.

3. Choose the font, style, and size you want to use for text display.

If you are configuring the Image Form Overlay font, you do not need to select a font size. Text on pages with an image overlay automatically appears at a calculated size that is not configurable.

4. Click OK to save the settings.

Printer Fonts

The font used for printing text documents depends on whether the page has a text overlay, an image overlay, or no overlay at all. It also depends on whether the user is allowed to zoom in on the page.

Zoom is configured using the Allow zoom setting on the COLD tab. For more information on configuring Allow zoom, see *Allow Zoom* on page 2-39.

Using the Printer Fonts setting, you can configure the fonts used for printing text.

You can configure the print fonts to be the same as the display fonts. For more information on configuring screen fonts, see *Screen Fonts* on page 2-31.

However, you may need to configure the print fonts differently from the display fonts if the fonts installed on the workstation are different from those installed on the printer.

To set the print fonts:

1. Select the font to configure from the Printer Fonts list. You have the following choices:
 - Page (fixed size)
 - Page (variable size)
 - Image Form Overlay

The font that you select depends on whether the text page has a text or image overlay and whether zoom is enabled. The following table describes which font is used for printing text in each scenario:

Table 2-4 Configuring Printer Fonts with Form Overlay

Page Type	When Zoom is Enabled	When Zoom is Disabled
Text with no overlay	Page (variable size)	Page (fixed size)
Text with a text overlay	Page (variable size)	Page (fixed size)
Text with an image overlay	Image Form Overlay	Image Form Overlay

2. Click Change. The Font dialog box appears.

AppXtender supports only fixed pitch fonts. The fonts that appear in the list are the only fixed pitch fonts currently on your printer.

3. Choose the font, style, and size you want to use for text display.

If you are configuring the Image Form Overlay font, you do not need to select a font size. Text on pages with an image overlay automatically prints at a calculated size that is not configurable.

4. Click OK to save the settings.

Simulate Box Drawing Characters

AppXtender uses "box drawing characters" to support the use of fonts that require box drawing characters to correctly represent AppXtender text documents. Because of this, several characters in the AppXtender font set are replaced with box drawing characters. For documents that are written in foreign languages, this substitution may interfere with the font set requirements for the foreign language. Characters display as boxes rather than as the characters that they should be.

For example, when viewing documents written in the Danish language, the box drawing character substitution interferes with the font set requirements for Danish.

You need to disable the Simulate Box Drawing Characters options to view documents and text form overlays written in any foreign language that uses characters that are assigned using the ASCII values from 176 to 223.

To allow viewing of documents written in foreign languages using the ASCII values from 176 to 223:

1. Disable the Enable Support for Form Text option to allow display of form overlays written in foreign languages using the ASCII values from 176 to 223.
2. Disable the Enable Support for Data Text option to allow display of text documents written in foreign languages using the ASCII values from 176 to 223.

Scan Tab

The Scan tab of the Configuration dialog box allows you to customize your batch scanning process.

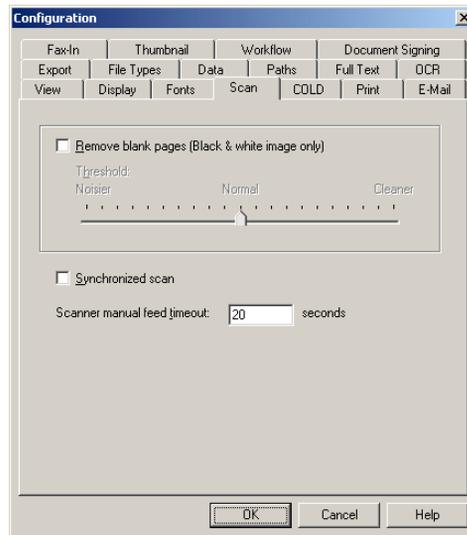


Figure 2-16 Configuration Dialog Box: Scan Tab

Removing Blank Pages

You can configure AppXtender Document Manager to automatically remove blank pages from the batch while you are scanning.

To configure the automatic removal of blank pages:

1. On the Scan tab of the Configuration dialog box, select the Remove blank pages check box to enable the option. The Threshold slider becomes available.

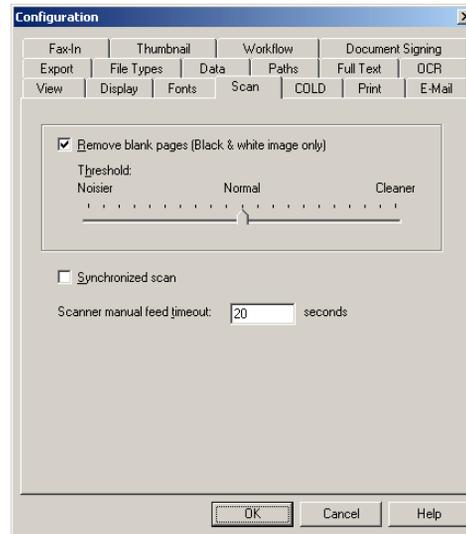


Figure 2-17 Configuration Dialog Box: Scan Tab: Removing Blank Pages

2. Use the Threshold slider to adjust the setting for what the scanner recognizes as a blank page. Keep in mind the following points:
 - If you want to allow a noisier image to be recognized as a blank page (and therefore removed), adjust the slider towards Noisier.
 - If you want to allow a cleaner image to be recognized as a blank page (and therefore removed), adjust the slider towards Cleaner.
3. Click OK to save the settings.



CAUTION

As you begin to use this feature, examine the pages that are scanned and take note of which pages are automatically removed from the document or batch as you scan them. If you find that

pages are being removed that should not be removed, adjust the slider towards Cleaner. You must make sure that the Threshold slider setting is appropriate for the pages that you are scanning.

Synchronized Scan

With some types of scanning, the images are scanned faster than AppXtender Document Manager can display them. The Synchronized scan option slows down your scanner so that AppXtender Document Manager can display each scanned image. You have the following choices:

- ◆ If you want to review each page as it is scanned, enable the Synchronized scan option.
- ◆ If you want to allow your scanner to scan images at its highest speed, disable the Synchronized scan option.

Scanner Manual Feed Timeout

This option sets the scanner timeout for scanning that is performed while in the manual feed mode. The default is 20 seconds. The timeout option specifies how much time you will need to put more pages in the scanner without having to manually continue the scan process. This option can be set higher or lower to meet your needs.

COLD Tab

The COLD tab of the AppXtender Document Manager Configuration dialog box allows you to configure the display of the following file types:

- ◆ ApplicationXtender Reports Management (AppXtender Reports Mgmt) documents
- ◆ Text, as defined on the File Types tab of the Configuration dialog box (For instructions, see *File Types Tab* on page 2-58.)

The COLD tab is not available on the AppXtender Image Capture Configuration dialog box.

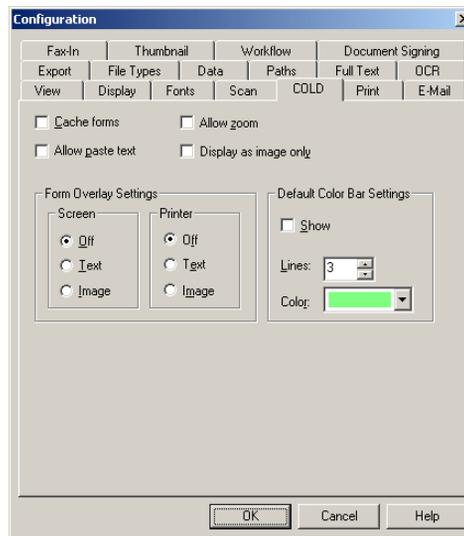


Figure 2-18 Configuration Dialog Box: COLD Tab

Cache Forms

When this option is selected, forms will be cached locally in memory to facilitate quicker retrieval. This setting holds for the current session only. Once you exit AppXtender Document Manager, the form is no longer held in cache. Click to place a check mark in the Cache Forms check box to enable the option.

Allow Paste Text

Users are not required to use the Paste Special command to insert text pages from the clipboard. AppXtender supports standard pasting of

text pages from the clipboard with the Paste command. The Allow paste text option must be enabled to activate this function.

Allow Zoom

When this option has a check mark in it, the Zoom feature becomes active for AppXtender Reports Mgmt and COLD and ASCII documents. Consequently, you can zoom in and out on AppXtender Reports Mgmt or COLD and ASCII documents if a variable font is selected.

Display As Image Only

When enabled, this option restricts the user's ability to change an AppXtender Reports Mgmt document with an Image Form Overlay to either a COLD or ASCII Form Overlay or without the Image Form Overlay.

Form Overlay Settings

The Form Overlay Settings configure display and print options for AppXtender Reports Mgmt documents. Separate settings apply to display and print. COLD and AppXtender Reports Mgmt documents can be configured to display or print with a form overlay.

Screen This option determines how AppXtender Reports Mgmt documents are displayed. Select Off to display documents without a form overlay. Select Text to display documents with a text form overlay, or select Image to display documents with an image form overlay.

Printer This option determines how AppXtender Reports Mgmt documents are printed. Select Off to print documents without a form overlay. Select Text to print documents with a text form overlay, or select Image to print documents with an image form overlay.

Default Color Bar Settings

This feature lets you view text documents with a "color" bar background. When a document is displayed with the color bar enabled, the background will be composed of alternating bars of a selected color and white. You can change the color and the width of the bands.

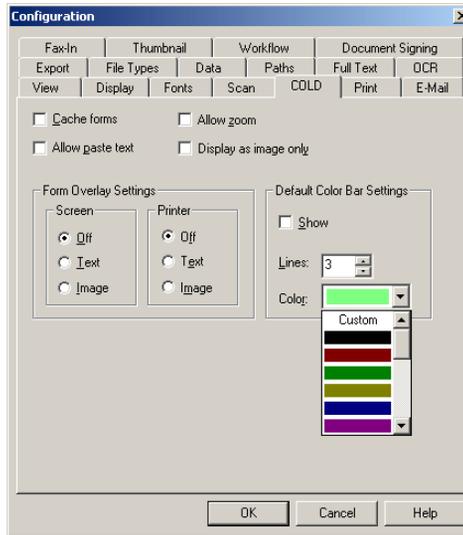


Figure 2-19 Configuration Dialog Box: COLD Tab: Color Bar Options

Show Use this option to turn the color view on or off. A check mark indicates that color view is on. No check mark indicates that color view is off.

Lines This option determines the width of the bands. The default setting is three lines.

To set the line width:

- ◆ In the Lines box, type or select the number of lines desired by using the up or down arrow.

Color This option sets the color to be used in color view.

To set the line color:

- ◆ In the Color drop-down list, click the color of your choice. (If the color that you want to use is not listed, select Custom. The standard Windows Color dialog box appears, allowing you to create a color for the color bar.)

Print Tab

The Print tab of the AppXtender Document Manager Configuration dialog box allows you to configure how documents or pages are printed from AppXtender Document Manager. The Print tab of the AppXtender Image Capture Configuration dialog box allows you to configure how pages are printed from AppXtender Image Capture. Some of the options on the AppXtender Document Manager Configuration dialog box Print tab are not available on the AppXtender Image Capture Configuration dialog box Print tab, because they configure features that are not available in AppXtender Image Capture.

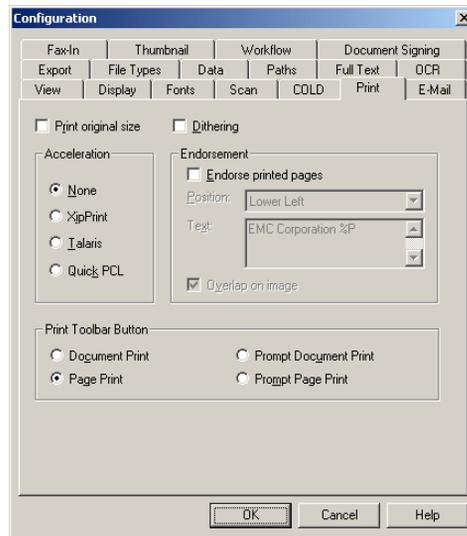


Figure 2-20 Configuration Dialog Box: Print Tab

Print Original Size

When an AppXtender page is printed, the printer automatically fits the contents of the page to a standard printable area. If some characters in the page are outside the printable area of the page, the printer slightly reduces the overall size of the page so that all characters can fit. However, there are occasions when a perfect one-to-one (original to printed) match is required. AppXtender Document Manager meets this requirement through the Print original size feature. This function allows AppXtender Document

Manager to override the printer's fixed printable area. All characters in a page are scaled to print exact original size.

When the Print Original Size option is enabled, AppXtender Document Manager overrides the printer's printable area and prints the selected page in exact original size. When disabled, the printer shrinks or enlarges the selected page to fit the printable area.

This option applies to the following page types:

- ◆ Images
- ◆ Text, as defined on the File Types tab of the Configuration dialog box (For instructions, see *File Types Tab* on page 2-58.)

Dithering

Dithering is a technique used in computer graphics to create the illusion of varying shades of gray on a monochrome display or printer. Dithering relies on treating areas of an image as groups of dots that are colored in different patterns. Dithering takes advantage of the eye's tendency to blur spots of different colors by averaging their effects and merging them into a single perceived shade or color. Depending on the ratio of black dots to white dots within a given area, the overall effect is of a particular shade of gray. Dithering is used to add realism to computer graphics and to soften jagged edges in curves and diagonal lines at low resolutions.

If you are printing a color image to a monochrome (black and white) printer, you can improve the quality of the printout by enabling the Dithering option. When this option is enabled and you send a color image to a monochrome printer, AppXtender Document Manager dithers the image. For example, if you print a color, 400 K, 200 DPI image to a monochrome printer, the result is a black and white, 3600 K, 600 DPI image of the same size. Each pixel in the color image becomes nine pixels in the black and white image.

When the Dithering option is enabled and you send an image to a *color* printer, AppXtender does *not* dither the image.

Print Toolbar Button

The Print Toolbar Button options allow you to configure the Print button on the Main toolbar. You have the following choices:

- ◆ If you want the Print button to print the entire displayed document, select Document print.

- ◆ If you want the Print button to print only the displayed page, select Page print.
- ◆ If you want the Print button to display a Print dialog box for the currently displayed document, so that the user can specify the scope of each print job individually, select Prompt.
- ◆ If you want the Print button to display a Print dialog box for the currently displayed page, so that the user can specify the scope of each print job individually, select Prompt.

Acceleration

The Acceleration options expedite the printing of documents or batches. Document Manager supports XipPrint accelerator cards, Talaris printers, and Quick PCL printing.

Pages with annotations, Cold and AppXtender Reports Mgmt pages with a form overlay, and pages with print endorsements (from AppXtender Document Manager) are not printed in accelerated mode. Whenever a page of one of these types is printed, AppXtender Document Manager ignores the acceleration setting while that page prints.

XipPrint If you have a XipPrint II card, you can use the XipPrint printer acceleration feature. The XipPrint II is a card that can be installed in the SIMM socket of a printer. It takes over file decompression, allowing AppXtender Document Manager to process print jobs more quickly.

Talaris If you have a Talaris 1794FT or 3290FT printer, you can use the Talaris printer acceleration feature. The Talaris 1794FT and 3290FT printers take over file decompression, allowing AppXtender Document Manager to process print jobs more quickly.

Quick PCL If you have a PCL5 compatible printer, such as HP III, HP IV or Compaq, you can use the Quick PCL printer acceleration feature. This feature significantly improves printing performance for black and white images to any PCL5 compatible printers. Quick Print bypasses the Windows GDI layer so that AppXtender Document Manager communicates directly with the Windows printer driver. This substantially reduces cycle time.

Quick Print is valid for bi-tonal images only. Grayscale and color images are processed at the standard rate.

Endorse Printed Pages

You can use this option to print pages with an identifying text message in one corner of each page. The message can include the page number of the page printed. Endorsements print on all pages as long as the option is enabled.

Endorsements are valid for all file types except HTML.

To configure print endorsement:

1. Click the Endorse Printed Pages check box. (To disable the endorsement, clear the check box.)

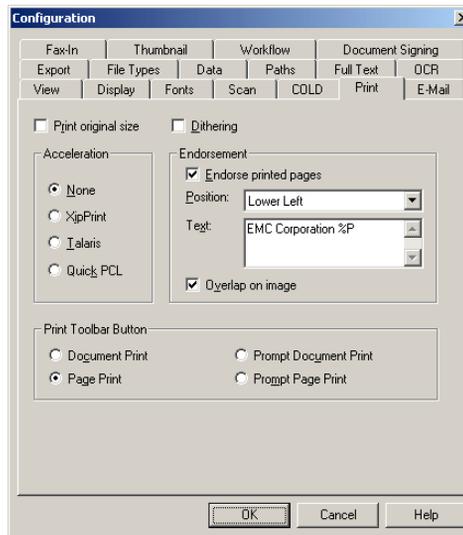


Figure 2-21 Configuration Dialog Box: Print Tab: Endorsement Options

2. From the Position drop-down list, select an option. Available options include Lower right, Lower left, Upper right, and Upper left.
3. In the Text text box, type the message you want printed. To print the number of the current page in the endorsement, include %P in the endorsement text string. Endorsement text strings can be up to 10 lines, and each line can have up to 80 characters, including spaces.
4. Enable or disable the Overlap on image option. (This option is not available when using XipPrint or Talaris acceleration.)

- If this option is enabled, the endorsement overlaps any images. This option allows the image to be printed on a larger area of the page.
- If this option is disabled, the images and the endorsement take up separate areas of the printed page. Also, if this option is disabled, the Print original size option becomes unavailable.

Consider disabling this option if the endorsement overlaps with an important part of the image, or if the endorsement is difficult to read with the image printed behind it.

The endorsement will be printed on every page in the location selected from the Position drop-down list. The page number will be printed wherever the %P is located within the text string.

E-Mail Tab

The E-Mail tab of the AppXtender Document Manager Configuration dialog box provides options for e-mailing AppXtender documents. AppXtender interfaces with Microsoft Outlook® or cc:Mail™ so that you can attach AppXtender documents or pages to electronic mail messages. (The E-Mail tab is not available on the AppXtender Image Capture Configuration dialog box.)

The attachment is displayed as an icon in the body of the e-mail message, and the recipient double-clicks the icon to view documents or pages. AppXtender Document Manager has both a Mail Document Reference feature and a Mail Document Page feature. Use this page to configure the Mail Document Pages feature in the Document menu and the Mail feature in the Page menu.

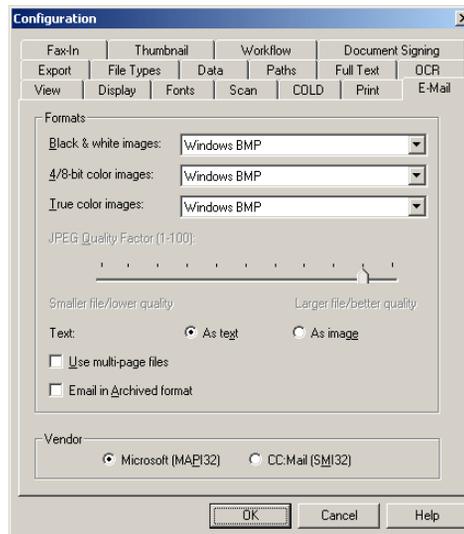


Figure 2-22 Configuration Dialog Box: E-Mail Tab

Through e-mail configuration, any user can receive and view an e-mail message with an AppXtender attachment, even if AppXtender Document Manager is not installed on the user's workstation. This is accomplished by converting the AppXtender document into a format that can be opened by an application that exists on the user's workstation. If the recipient has only the Paint program, for example, AppXtender Document Manager can convert the attachment to a

bitmap format. The recipient can then view the attachment via Paint, because it reads bitmap files.

For instructions on sending documents by e-mail, refer to the "Managing Documents" chapter of the *ApplicationXtender Document Manager User's Guide*.

E-Mail Formats

On the E-Mail tab of the Configuration dialog box, all available formats for each image type (that is, Black & white images, 4/8-bit color images, and True color images), are listed. The following is an explanation of the E-Mail tab options that are available for your use.

Black & White Images for E-Mail

This option determines the file format that AppXtender Document Manager will use for images. Select a file format from the Black & white images drop-down list. Your choices are Windows BMP, TIFF, and TIFF Compressed.

4/8-bit Color Images for E-Mail

This option determines the file format that AppXtender Document Manager will use for 4/8-bit color images. Select an appropriate file format from the 4/8-bit color images drop-down list. Your choices are Windows BMP, Windows BMP Compressed, GIF, TIFF, and TIFF Compressed.

True Color Images for E-Mail

This option determines the file format that AppXtender Document Manager will use when e-mailing true color images. Select an appropriate file format from the True color images drop-down list. Your choices are Windows BMP, GIF, JPEG, TIFF, and TIFF Compressed.

You can compress true color images using Joint Photographic Experts Group (JPEG) image compression. If you select JPEG, the JPEG quality factor (1-100) is enabled. For more information on compressing JPEG images, see *JPEG Quality Factor (1-100)* on page 2-47.

AppXtender does not support progressive JPEGs. Importing a progressive JPEG into AppXtender will result in the file being imported as a foreign file.

JPEG Quality Factor (1-100)

JPEG provides compression of true color images, such as photographs, artwork, and similar still images. There is always some loss of information when you use JPEG compression to compress an image. For example, when compressing a scanned photograph, the output image is not exactly identical to the input image.

JPEG compression allows you to trade off between file size and output image quality. In most cases, you want to obtain a minimum file size by choosing the maximum amount of compression without affecting the output image quality. However, if image quality is not important, you can use a higher compression level to make an extremely small file. Conversely, if the image quality is important, you can use a lesser compression level to increase the quality until there is no visible change to the output image.

The JPEG quality factor (1-100) slider allows you to choose the compression setting for true color images. AppXtender uses the JPEG quality factor scale, which ranges from 1 to 100, where 1 indicates the smallest file size with the lowest quality and 100 indicates the largest file size with the best quality.

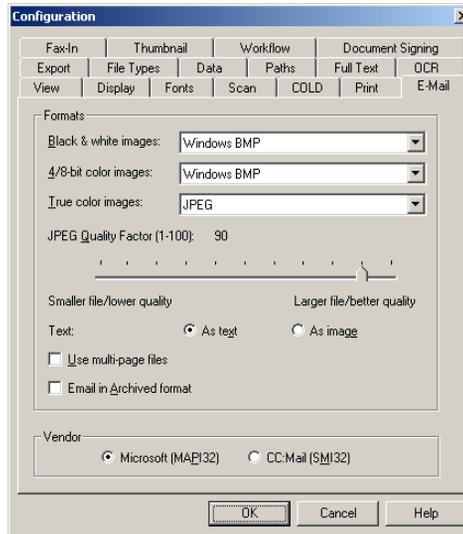


Figure 2-23 Configuration Dialog Box: E-Mail Tab: JPEG Quality Factor

To set the level of JPEG compression for e-mailed images:

1. On the E-Mail tab of the Configuration dialog box, select JPEG from the True color images drop-down list. The JPEG Quality Factor (1-100) slide ruler becomes available.
2. Use the slide ruler on the scale to adjust (reduce or increase) the level of compression and the quality factor that AppXtender applies to True color images when they are sent by e-mail.
3. Click OK to save the settings.

Text for E-Mail This option determines the file format that AppXtender Document Manager will use when e-mailing text pages. By selecting *As text*, AppXtender Document Manager will e-mail pages as text and exclude all annotations except redactions. Redactions cause the area where the redaction is located to be blank. By selecting *As image*, AppXtender Document Manager will e-mail text pages as TIFFs regardless of the image e-mail settings and include all annotations.

Use Multi-Page Files for E-Mail You can combine sequential pages that are similar or of the same file type and send them by e-mail as a combined file attachment or as a sequence of combined file attachments with the *Use multi-page files* option. For example, a document composed of a GIF, a TIFF, two PDFs, and three JPEGs (in that order) would be combined into three files: a TIFF, a PDF, and another TIFF. The first TIFF would contain the GIF and TIFF, the PDF would contain the two PDFs, and the second TIFF would contain the three JPEGs.

AppXtender can combine up to 1024 TIFF pages into a single attachment. For example, if you send a document that contains 1025 consecutive TIFF pages, one attachment contains the first 1024 consecutive TIFF pages and another attachment contains the remaining TIFF page.

The following table details which file types can be combined and how they are combined:

Table 2-5 File Types and Combined Output

File Types	Output When Combined
All supported image files, including: <ul style="list-style-type: none"> • TIFF • GIF • Bitmap • PCX • DCX • JPEG • TGA 	1 TIFF file for each sequence of image pages in the document The number of pages that can be combined into 1 TIFF file is limited to 1024. If there are more than 1024 pages in the document, the combined files are broken up so that each file has no more than 1024 pages in it.
Adobe Portable Document Format (PDF) files	1 PDF file for each sequence of PDF pages in the document
Text files, including: <ul style="list-style-type: none"> • TXT files • AppXtender Reports Mgmt reports 	1 TXT file for each sequence of text pages in the document (if the TXT file type was configured on the Configuration File Types tab in AppXtender Document Manager when the document was created); otherwise 1 TXT file for <i>each</i> TXT page in the document

Table 2-5 File Types and Combined Output (continued)

File Types	Output When Combined
Rich Text Format (RTF) files	1 RTF file for <i>each</i> RTF page in the document
HTML files	1 HTML file for <i>each</i> HTML page in the document
AppXtender-supported foreign file types, including: <ul style="list-style-type: none"> • Word processing files • Spreadsheets • Presentations 	1 file for <i>each</i> file in the document

When the Use multi-page files option is disabled, pages of the same type are not combined. If you send a document by e-mail when this option is disabled, each page of the document is a separate attachment to the e-mail message.

E-mail in Archived Format

The Email in Archived format option allows you to send the archived format of each page by e-mail. That is, instead of specifying that images be sent as Windows BMP, Windows BMP Compressed, GIF, JPEG, TIFF, or TIFF Compressed, you can specify that pages be sent in the same format in which they were stored in the AppXtender system. A page can be sent in its archived format only when both of the following conditions are true:

- ◆ The current user has sufficient privileges to hide all of the redactions on the page (if there are any).
- ◆ The page to be sent is not a certain kind of subpage. (If a subpage number appears after the BIN file name in the Information dialog box for the page to be sent, it can not be sent in its archived format. For instructions on displaying the Information dialog box, see the "Viewing Documents" chapter of the *ApplicationXtender Document Manager User's Guide*.)

If these conditions are true, the archived format of the page is always sent. If these conditions are not true, the page is sent as specified with other format options on the E-mail tab.

For example, if you have the image storage format for black and white images set to TIFF on the Data tab of the Configuration dialog box, and you import a black and white image into AppXtender, it is stored in TIFF format. If you enable the Use archived format option on the E-mail tab, and you send the same image from AppXtender (and the conditions above are met), it is sent as TIFF.

When the archived format of a page is sent by e-mail, no annotations are included on that page.

You can use this option to allow images to be sent in their *original* format. That is, if an image is imported into AppXtender and sent from AppXtender, the format of the sent image is exactly the same as the original image before import. A page can be sent in its original format only when all of the following conditions are true (in addition to the conditions above):

- ◆ The image storage format for the image type on the Data tab of the Configuration dialog box was set to Default when the image was imported.
- ◆ The Separate multi-page TIFFs option on the Data tab of the Configuration dialog box was disabled when the image was imported.
- ◆ The page to be sent is not text. (Text is always compressed before storage.)

If these conditions are true, the original format of the page is always sent.

E-Mail Vendor

This option configures the e-mail package that will be used by AppXtender Document Manager. You can choose from either Microsoft (MAPI32) or CC: Mail (SMI32).

Export Tab

The Export tab of the AppXtender Document Manager Configuration dialog box provides options for exporting AppXtender documents and pages. AppXtender Document Manager can export documents and pages in the system to various file formats. (The Export tab is not available on the AppXtender Image Capture Configuration dialog box.)

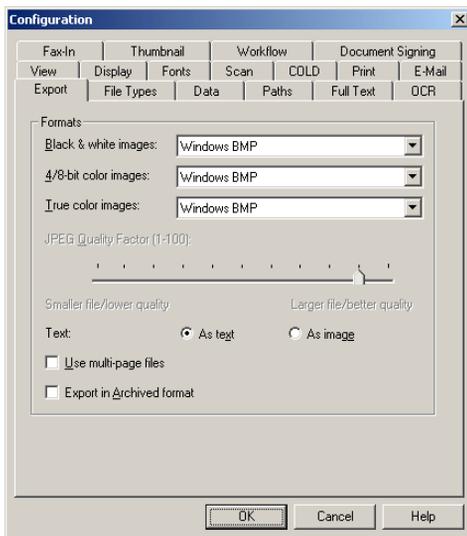


Figure 2-24 Configuration Dialog Box: Export Tab

For instructions on exporting documents, refer to the "Managing Documents" chapter of the *ApplicationXtender Document Manager User's Guide*.

Black & White Images for Export

This option determines the file format that AppXtender will use for images. Select a file format from the Black & white images drop-down list. Your choices are Windows BMP, TIFF, and TIFF Compressed.

4/8-bit Color Images for Export

This option determines the file format that AppXtender will use for 4/8-bit color images. Select an appropriate file format from the 4/8-bit color images drop-down list. Your choices are Windows BMP, Windows BMP Compressed, GIF, TIFF, and TIFF Compressed.

True Color Images for Export

This option determines the file format that AppXtender will use when exporting true color images. Select an appropriate file format from the True color images drop-down list. Your choices are Windows BMP, GIF, JPEG, TIFF, and TIFF Compressed.

You can compress true color images using Joint Photographic Experts Group (JPEG) image compression. If you select JPEG, the JPEG quality factor (1-100) is enabled. For more information, see *JPEG Quality Factor (1-100)* on page 2-54.

JPEG Quality Factor (1-100)

JPEG provides compression of true color images, such as photographs, artwork, and similar still images. There is always some loss of information when you use JPEG compression to compress an image. For example, when compressing a scanned photograph, the output image is not identical to the input image.

JPEG compression allows you to trade off between file size and output image quality. In most cases, you want to obtain a minimum file size by choosing the maximum amount of compression without affecting the output image quality. However, if image quality is not important, you can use a higher compression level to make an extremely small file. Conversely, if the image quality is important, you can use a lesser compression level to increase the quality until there is no visible change to the output image.

The JPEG quality factor (1-100) slider allows you to choose the compression setting for true color images. AppXtender uses the JPEG quality factor scale, which ranges from 1 to 100, where 1 indicates the smallest file size with the lowest quality and 100 indicates the largest file size with the best quality.

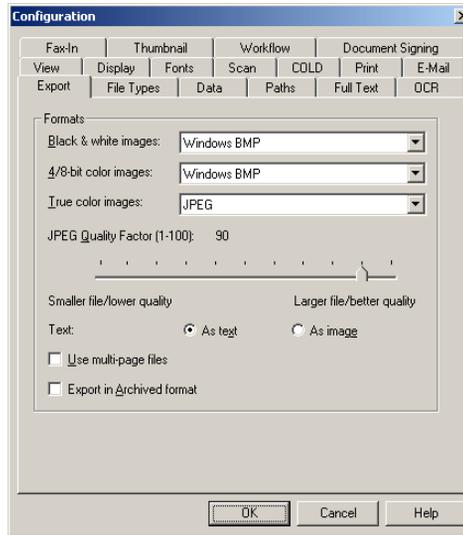


Figure 2-25 Configuration Dialog Box: Export Tab: JPEG Quality Factor

To set the level of JPEG compression for exported images:

1. On the Export tab of the Configuration dialog box, select JPEG from the True color images drop-down list. The JPEG Quality Factor (1-100) slide ruler becomes available.
2. Use the slide ruler on the scale to adjust (reduce or increase) the level of compression and the quality factor that AppXtender applies to True color images when they are exported.
3. Click OK to save the settings.

Text for Export

This option determines the file format that AppXtender will use when exporting text pages. By selecting *As text*, AppXtender will export pages as text and exclude all annotations except redactions. Redactions cause the area where the redaction is to be blank in the exported page. If you select *As image*, AppXtender will export text pages as TIFFs (regardless of the image export settings) and include all annotations.

Use Multi-Page Files for Export

You can combine sequential pages that are similar or of the same file type and export them as a combined file or as a sequence of combined files with the *Use multi-page files* option. For example, a document

composed of a GIF, a TIFF, two PDFs, and three JPEGs (in that order) would be combined into three files: a TIFF, a PDF, and another TIFF. The first TIFF would contain the GIF and TIFF, the PDF would contain the two PDFs, and the second TIFF would contain the three JPEGs.

AppXtender can combine up to 1024 TIFF pages into a single file. For example, if you export a document that contains 1025 consecutive TIFF pages, one file contains the first 1024 consecutive TIFF pages and another file contains the remaining TIFF page.

Files can be combined for export in the same way that they can be combined for e-mail. For detailed information on how files are combined, see *Use Multi-Page Files for Export* on page 2-55.

When the Use multi-page files option is disabled, pages of the same type are not combined. If you export a document when this option is disabled, each page of the document is exported as a separate file.

Export in Archived Format

The Export in Archived format option allows you to export the archived format of each page. That is, instead of specifying that images be exported as Windows BMP, Windows BMP Compressed, GIF, JPEG, TIFF, or TIFF Compressed, you can specify that pages be exported in the same format in which they were stored in the AppXtender system. A page can be exported in its archived format only when both of the following conditions are true:

- ◆ The current user has sufficient privileges to hide all of the redactions on the page (if there are any).
- ◆ The page to be exported is not a certain kind of subpage. (If a subpage number appears after the BIN file name in the Information dialog box for the page to be exported, it can not be exported in its archived format. For instructions on displaying the Information dialog box, see the "Viewing Documents" chapter of the *ApplicationXtender Document Manager User's Guide*.)

If these conditions are true, the archived format of the page is always exported. If these conditions are not true, the page is exported as specified with other format options on the Export tab.

For example, if you have the image storage format for black and white images set to TIFF on the Data tab of the Configuration dialog box, and you import a black and white image into AppXtender, it is stored in TIFF format. If you enable the Use archived format option

on the Export tab, and you export the same image from AppXtender (and the conditions above are met), it is exported as TIFF.

When the archived format of a page is exported, no annotations are included on that page.

You can use this option to allow images to be exported in their *original* format. That is, if an image is imported into AppXtender and exported from AppXtender, the format of the exported image is the same as the original image before import. A page can be exported in its original format only when all of the following conditions are true (in addition to the conditions above):

- ◆ The image storage format for the image type on the Data tab of the Configuration dialog box was set to Default when the image was imported.
- ◆ The Separate multi-page TIFFs option on the Data tab of the Configuration dialog box was disabled when the image was imported.
- ◆ The page to be exported is not text. (Text is always compressed before storage.)

If these conditions are true, the original format of the page is always exported.

File Types Tab

The File Types tab of the Configuration dialog box provides options for importing files into AppXtender. By default, files not natively supported by AppXtender (for example, files other than TIFF, Windows bitmaps, TGA, RTF, JPEG, GIF, PCX, and DCX) are imported as foreign files. (For details on what file types are natively supported, refer to the "Getting Started" chapter of the *ApplicationXtender Document Manager User's Guide*.) Pages imported as foreign files are represented in AppXtender Document Manager in one of the following two ways:

- ◆ Represented by an icon and require a third-party viewer to display the contents of the page
- ◆ Displayed in the Verity KeyView Viewer (For more information, see *Use KeyView to Display Foreign Files* on page 2-26.)

For example, if a Microsoft Word document is imported (using the Import File function) as a new page, a Word icon displays as the AppXtender page. You then double-click the icon to start Word and view the document. The File Type tab provides options for importing file types or extensions.

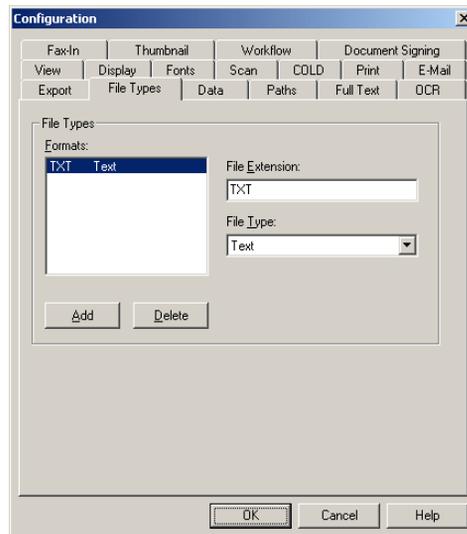


Figure 2-26 Configuration Dialog Box: File Types Tab

AppXtender supports different file types in a variety of ways.

- ◆ Microsoft Word documents can be brought into AppXtender as OLE Objects, in which case the File Types settings do not matter. File Types settings apply only when a document or page is brought into AppXtender using the Import File command. (AppXtender Image Capture does not support OLE Objects.)
- ◆ AppXtender does not support progressive JPEGs. Importing a progressive JPEG into AppXtender results in the file being imported as a foreign file.
- ◆ By default, most text pages are imported into AppXtender as plain text, but some may be imported as foreign files. If you want to import all files with a TXT extension as plain text, add this file type in the File Types tab.

Adding File Types

The File Types tab of the Configuration dialog box allows you to configure AppXtender Document Manager to recognize files by their extensions as certain file types. For example, you can configure AppXtender Document Manager to recognize files with the TXT extension as the Text file type.

To add a file type:

1. In the File Extension text box, type the extension that you want AppXtender Document Manager to recognize.
2. Select a file type from the File Type drop-down list. The File Type options available are Image Format, Text, Rich Text Format, Embedded Object, Foreign File, Web Component, and Adobe PDF.
3. Click Add. The extension and file type are added to the Formats list.
4. Click OK to save the settings.

Deleting File Types

The File Types tab of the Configuration dialog box allows you to remove extensions from the list of recognized file types.

To delete a file type:

1. In the Formats list, select the file type you want to delete.
2. Click Delete. The file type is removed from the Formats list.
3. Click OK to save the settings.

Data Tab

Some of the options on the AppXtender Document Manager Configuration dialog box Data tab are not available on the AppXtender Image Capture Configuration dialog box Data tab, because they configure features that are not available in AppXtender Image Capture.

- ◆ The Data tab of the AppXtender Image Capture Configuration dialog box allows you to set default image formats and other data-related settings.
- ◆ The Data tab of the AppXtender Document Manager Configuration dialog box allows you to set AppXtender Document Manager index options, set default image formats, and other data-related settings.

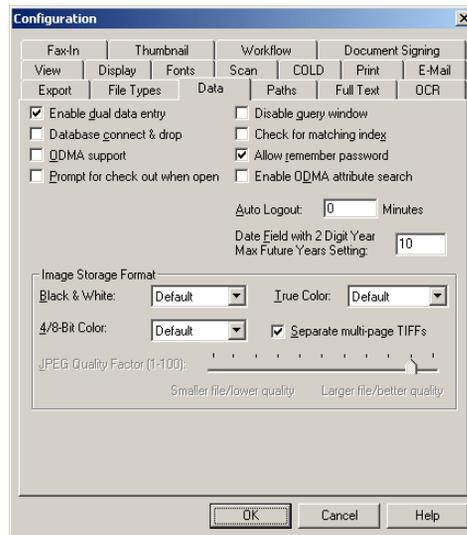


Figure 2-27 Configuration Dialog Box: Data Tab

Enable Dual Data Entry

The Enable dual data entry option on the Data tab works in conjunction with the Dual Data Entry flag configured in AppXtender AppGen. This option is enabled by default. (Dual Data Entry options are not available in AppXtender Image Capture.)

In order for dual data entry to be available for an index field, your system administrator must first enable the Dual Data Entry flag for that field in AppXtender AppGen. For more information, consult your AppXtender system administrator or refer to the "Application Design Reference" appendix of the *ApplicationXtender Core Components Administrator's Guide*.

The Dual Data Entry flag and the Enable dual data entry option together form a validation measure that ensures documents are indexed correctly. When this feature is enabled, you must enter an index field's data twice. AppXtender Document Manager accepts the information upon verification of the second entry.

If the information entered the second time is the same as the first time, the document is indexed and added to the application. If the information is not entered correctly, a Dual Data Entry Error dialog box appears.

If an Auto Index table is used to enter a value into an index field, even if that field is flagged for dual data entry, the user is *not* prompted to enter data a second time. For more information on importing data into an Auto Index table, consult your AppXtender system administrator or refer to the "Import Wizards" appendix of the *ApplicationXtender Core Components Administrator's Guide*. For more information on using an Auto Index table to enter a value into an index field, consult your AppXtender system administrator or refer to the "Using Auto Index to Index Documents" section of the *ApplicationXtender Document Manager User's Guide*.

To activate dual data entry:

1. During application generation in the AppXtender AppGen, apply the Dual Data Entry flag to each index field that requires the validation feature.
2. In AppXtender Document Manager, in the Configuration dialog box, click the Data tab.
3. Make sure that the Enable dual data entry option is enabled. (This option is enabled by default.)
4. Click OK to save the settings.

Disable Query Window

This option allows AppXtender system administrators to control what queries are run in AppXtender. This option limits access to the Query view on the AppXtender Document Manager workstation. (Query options are not available in AppXtender Image Capture.)

This option is intended for systems where the AppXtender SDK has been used to set up access to AppXtender from another interface. You can use this option to force users to run queries from another interface instead of AppXtender.

Database Connect & Drop

This option controls the duration of the database connection held by AppXtender Document Manager. By default, the Database connect & drop option is disabled.

- ◆ If this option is disabled, the AppXtender Document Manager data layer holds the connection to the underlying database for the entire AppXtender Document Manager session.
- ◆ If this option is enabled, the AppXtender Document Manager data layer connects to the database when needed and then drops the connection when it is not needed.

Because the user is connecting to the database and then dropping the connection when it is not needed, if the database goes down and back up or if the database fails over in a clustered server environment, AppXtender Document Manager connects to the restarted database or the new database. However, because users are connecting and dropping, there is performance degradation when this option is enabled (because database connect and drop depends on the data source's ability to perform connection pooling).

If you are planning to run AppXtender Document Manager in a clustered environment, you must enable the Database connect & drop option. For more information on clustering, refer to the "Using AppXtender with a Clustered Environment" section of the *ApplicationXtender Concepts and Planning Guide*.

Check for Matching Index

If this option is enabled, AppXtender Document Manager will automatically check existing documents for a duplicate index. This option allows the same index value or combination of index values to be entered for more than one document in an application. (Index options are not available in AppXtender Image Capture.)

ODMA Support

Use this option to activate the Open Document Management API (ODMA) integration between AppXtender-supported ODMA client applications and AppXtender. By enabling this option, users of AppXtender-supported ODMA client applications can easily store and retrieve documents within AppXtender without leaving an

active client application. (ODMA options are not available in AppXtender Image Capture.)

Allow Remember Password

This option controls the display of the Remember password option on the Login dialog box for AppXtender Document Manager or Image Capture. By default, the Allow remember password option is enabled. The following table indicates the result of enabling or disabling the Allow remember password option on the AppXtender Document Manager or Image Capture Configuration dialog box:

Table 2-6 Allow Remember Password Option

Option Status	Configuration Dialog Box	Result
Enabled	AppXtender Document Manager	The next time you start AppXtender Document Manager, the Login dialog box appears <i>with</i> the Remember password option.
Enabled	AppXtender Image Capture	The next time you start AppXtender Image Capture, the Login dialog box appears <i>with</i> the Remember password option.
Disabled	AppXtender Document Manager	The next time you start AppXtender Document Manager, the Login dialog box appears <i>without</i> the Remember password option.
Disabled	AppXtender Image Capture	The next time you start AppXtender Image Capture, the Login dialog box appears <i>without</i> the Remember password option.

Prompt for Check Out when Open

This option controls the operational mode of AppXtender for the AppXtender Document Manager workstation. If this option is enabled, the AppXtender Document Manager workstation operates in check in/check out mode. If the option is disabled, the AppXtender Document Manager workstation operates in normal mode. In check in/check out mode, users are prompted to either check out a document or open it in read-only mode when they display the document. In AppXtender Document Manager normal mode, users can check out documents if needed, but they are not required to do so to make changes to a document (as long as the document is not checked out to someone else). (Options for document check-out are not available in AppXtender Image Capture.)

When a user checks a document out, AppXtender makes a separate working copy of the document. Any changes made to the document while the user has it checked out are made to the copy. If the user decides to check the document back in, the working copy is saved as

either a new document revision or a replacement document revision of the original document. If the user decides to cancel changes, the working copy is discarded by AppXtender.

When AppXtender is in check in/check out mode, use of revision control with AppXtender documents is mandatory. A user must check out a document to modify it. If the user does not check the document out, it is opened in read-only mode and it cannot be modified.

When AppXtender Document Manager is in normal mode, users can open and modify documents without checking them out. When a user closes a document, the modifications are automatically saved to the AppXtender document repository. Users *can* check out documents while AppXtender is in normal mode, to prevent other users from making modifications while they are working on a document. This is useful if making the document modifications will extend past the current user session.

If a user checks out a document and another user accesses that document while in normal mode, the second user automatically receives the AppXtender repository copy of the checked out document in read-only mode and is not able to make changes to the document until it is checked back in.

A similar option in AppXtender AppGen enables check in/check out mode on an application basis, rather than a workstation basis. If you need to configure your AppXtender system to comply with the Health Insurance Portability and Accountability Act of 1996 (HIPAA), it is recommended that you enable check in/check out mode on an application basis. For more information on configuring AppXtender to comply with HIPAA, refer to the "Entering Application Information" section of the *ApplicationXtender Core Components Administrator's Guide*.

The AppXtender Workflow tab has a related option called Check out document when opening and check in when closing. This option allows you to automatically check out a document when you open it, and check it back in when you close it. If this option is enabled, documents that are checked in or out are automatically given a timestamp as a check-in or check-out comment. For more information, refer to the *ApplicationXtender Workflow User's Guide*.

Enable ODMA Attribute Search

When a user creates an AppXtender document using an ODMA-compliant application, the user can enter optional

information about the document: title, subject, author, keywords, and comment. These pieces of information, including the name of the user that created the document, are considered to be the document's "ODMA attributes." These attributes can be changed once a document has been created. ODMA attributes (document properties) can be changed either within AppXtender or within the ODMA-compliant application that was used to create it. You can configure an AppXtender Document Manager workstation to allow users to use these ODMA attributes to retrieve documents. (ODMA options are not available in AppXtender Image Capture.)

To allow users to search by ODMA attributes:

- ◆ Enable the Enable ODMA attribute search option.

To prevent users from searching by ODMA attributes:

- ◆ Disable the Enable ODMA attribute search option.

Auto Logout

You can configure the AppXtender Document Manager workstation to automatically log out of AppXtender Document Manager after a specified period of idle time. An idle workstation is one on which the pointer and cursor have not been moved over any AppXtender interface, no dialog boxes or messages have appeared, and the current user is not logged onto any active data source as SYSOP. (The Auto Logout option is not available in AppXtender Image Capture.)

To configure Auto Logout:

- ◆ In the Auto Logout text box, specify the number of minutes that you want to allow an AppXtender Document Manager workstation to remain idle. (The maximum number of minutes that you can enter is 480.) When that time is up, the user is automatically logged out of AppXtender Document Manager.

To disable Auto Logout:

- ◆ In the Auto Logout text box, type 0 (zero).

Data Field 2 Digit Year Max Future Years Setting

When a date has been stored in a two-digit date format, AppXtender Document Manager interprets the date in the context of a range of one hundred years. For example, in the context of the range 1910 to 2009, AppXtender Document Manager interprets the year 08 as 2008 instead of 1908.

AppXtender Document Manager calculates the end of this range by adding the number that you specify in the Max Future Years Setting

text box to the current year. For example, if the current year is 2005 and you specify the value 25, AppXtender Document Manager would interpret each two-digit date in the context of the range 1931-2030. This option applies only to two-digit date formats.

It is not necessary to update this option each year, because AppXtender Document Manager calculates the range of years based on the current year. To continue the previous example (in which you have specified 25 in the Max Future Years Setting text box), in the year 2006, AppXtender Document Manager would interpret each two-digit date in the context of the range 1932-2031.

The default value for the Max Future Years Setting is 10. If you use the default value of 10, in the year 1999, AppXtender Document Manager would interpret any two-digit year between 00 and 09 as 2000-2009 respectively. AppXtender Document Manager would interpret any date between 10 and 99 as 1910-1999.

Image Storage Format

You can configure the default storage format for AppXtender Document Manager image files. These settings determine the storage format for documents, batches, and pages created from scanning.

These settings also determine to what storage format imported documents, batches, and pages are converted. This applies to all document imports, such as creating a new document, batch, or page using the Import File command; using the Index Image Import wizard and an import file that precedes each image file name with two "@" symbols (@@); creating a new document or page from a fax-in queue; and so on.

Storage Format for Black & White Images

This option determines the file format that AppXtender Document Manager uses to store bi-tonal images. Select an appropriate file format from the Black & White drop-down list. Your choices are Default, TIFF, and Windows BMP:

- ◆ If you select Default on the Configuration dialog box, imported bi-tonal images are stored in their native format (for example, a GIF file would be stored as GIF) and scanned bi-tonal images are stored as TIFF.
- ◆ If you select one of the specific image formats on the Configuration dialog box, all bi-tonal images are stored in that format, regardless of their original format.

Storage Format for 4/8-bit Color Images

This option determines the file format that AppXtender Document Manager uses for 4/8-bit color images. Select an appropriate file

Storage Format for True Color Images

format from the 4/8-Bit Color drop-down list. Your choices are Default, TIFF, and Windows BMP:

- ◆ If you select Default, imported 4/8-bit color images are stored in their native format (for example, a GIF file would be stored as GIF) and scanned 4/8-bit color images are stored as TIFF.
- ◆ If you select one of the specific image formats, all 4/8-bit color images are stored in that format, regardless of their original format.

This option determines the file format that AppXtender Document Manager uses to store true color images. Select an appropriate file format from the True Color drop-down list. Your choices are Default, TIFF, Windows BMP, and JPEG.

- ◆ If you select Default, imported true color images are stored in their native format (for example, a GIF file would be stored as GIF) and scanned true color images are stored as TIFF.
- ◆ If you select one of the specific image formats, all true color images are stored in that format, regardless of their original format.

You can compress true color images using Joint Photographic Experts Group (JPEG) image compression. If you select JPEG, JPEG compression is enabled. You can set the JPEG Quality Factor (1-100) slider to control the level of compression and the quality of the compressed images. For more information on compressing images using this slider, see *JPEG Quality Factor (1-100)* on page 2-67.

JPEG Quality Factor (1-100)

JPEG provides compression of true color images, such as photographs, artwork, and similar still images. There is always some loss of information when you use JPEG compression to compress an image. For example, when compressing a scanned photograph, the output image is not identical to the input image.

JPEG compression allows you to trade off between file size and output image quality. In most cases, you want to obtain a minimum file size by choosing the maximum amount of compression without affecting the output image quality. However, if image quality is not important, you can use a higher compression level to make an extremely small file. Conversely, if the image quality is important, you can use a lesser compression level to increase the quality until there is no visible change to the output image.

The JPEG quality factor (1-100) slider allows you to choose the compression setting for true color images. AppXtender Document Manager uses the JPEG quality factor scale, which ranges from 1 to 100, where 1 indicates the smallest file size with the lowest quality and 100 indicates the largest file size with the best quality.

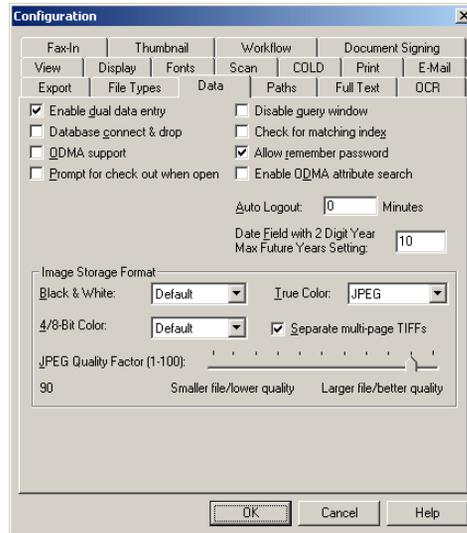


Figure 2-28 Configuration Dialog Box: Data Tab: JPEG Quality Factor

To set the level of JPEG compression for stored images:

1. On the Data tab of the Configuration dialog box, select JPEG from the True color images drop-down list. The JPEG Quality Factor (1-100) slide ruler becomes available.
2. From the True Color drop-down list, select JPEG.
3. Use the slide ruler on the scale to adjust (reduce or increase) the level of compression and the quality factor that AppXtender Document Manager applies to True Color images when they are stored.
4. Click OK to save the settings.

Separate Multi-Page TIFFs

This option controls how AppXtender Document Manager imports a multi-page TIFF or multi-page DCX file.

- ◆ If this option is enabled, AppXtender Document Manager imports a multi-page TIFF or multi-page DCX file by separating each page of the imported file into a page within the new document or batch. Each page is stored as a separate BIN file.

If you enable this option, file storage format for multi-page image files depends on the image storage format settings discussed above (for black and white, 4/8-bit color, or true color settings). If this option is enabled, AppXtender Document Manager applies the selected image storage format (for example, BMP) to each stored page separated from the multi-page file. If this option is enabled and the image storage format is set to Default, all multi-page image files are saved in the file's native format.

- ◆ If this option is disabled, AppXtender Document Manager imports a multi-page TIFF or multi-page DCX file in its native format, regardless of the image storage format settings discussed above. All of the pages in the multi-page file are stored together as one BIN file. Disabling this option greatly increases the speed at which system conversion is completed.

Paths Tab

The Paths tab of the Configuration dialog box allows you to configure local and personal write paths for the AppXtender Document Manager workstation. These are separate from the write paths established in AppXtender AppGen for the application. You may also enter volume label search drive(s) for the AppXtender Document Manager workstation. This setting tells AppXtender Document Manager to look at the specified drives for the images.

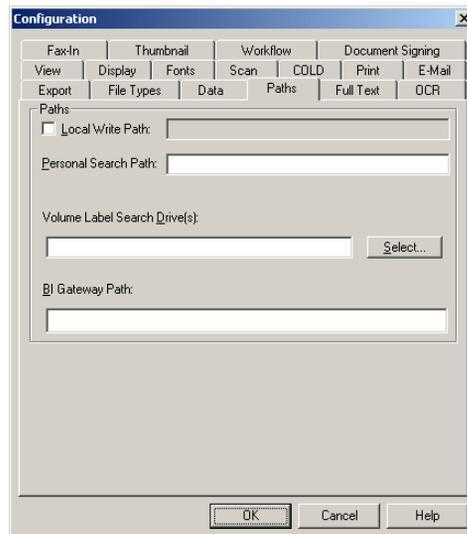


Figure 2-29 Configuration Dialog Box: Paths Tab

Path settings are saved in the Windows registry for each AppXtender Document Manager workstation. Whether you configure path settings on the Paths tab in the AppXtender Image Capture Configuration dialog box, or in the AppXtender Document Manager Configuration dialog box, the settings are saved to the same place in the registry and apply only to the workstation where the configuration takes place.

Local Write Path

Using this option, you can activate a temporary storage area for scanning in AppXtender Document Manager, such as a local hard drive. You can even configure a different local write path for each data source. If you index documents when scanning locally in

AppXtender Document Manager, the index information is stored in the AppXtender application just as if you had scanned to the primary document write path, except the images are stored locally. The Local Write Path option enables you to use the local write path when needed and the document write path at other times. When this option is enabled, documents are stored in the path entered in the Local Write Path text box.



CAUTION

Do not enable a local write path on the AppXtender Document Manager workstation where the AppXtender Index Server is installed. If a local write path has been configured and enabled when you attempt to start the AppXtender Index Server, an error message appears and the AppXtender Index Server automatically shuts down.

The Local Write Path option should be enabled when scanning locally. The option remains enabled until you clear the check box in the Paths tab of the Configuration dialog box.

You cannot use volume labels for the local write path.

You can use AppXtender Move Online to move locally scanned documents to the document write path. For instructions on using AppXtender Move Online, refer to the "AppXtender Move Online" appendix of the *ApplicationXtender Document Manager User's Guide* or the *ApplicationXtender Image Capture User's Guide*.

Personal Search Path

Using this option, you can configure additional paths to search for AppXtender documents or batches. If documents or batches for an application are stored in a location that is not referenced in any of the other path settings, a personal search path should be set to allow for retrieval of those documents or batches.

When retrieving documents or batches, AppXtender Document Manager searches first in the primary search path, then the application's write path, and then the paths listed in the Personal Search Path text box. AppXtender Document Manager then searches all the remaining configured write paths.

Volume Label Search Drives

The Paths tab of the Configuration dialog box allows you to specify the drives that AppXtender Document Manager searches to find documents or batches that were stored on removable media using volume labels.

If removable media with volume labels are used as document write paths to store documents or batches, this option is used to configure retrieval of those documents or batches. The drive letter (or letters) where the media will be mounted must be specified as Volume Label Search Drives. AppXtender Document Manager checks each of the drives specified to determine if the media labeled with the volume label is mounted in one of those drives. If not, AppXtender Document Manager prompts the user to insert the appropriate media.

To specify a drive:

1. You have the following choices:
 - In the Volume Label Search Drive(s) text box, type the drive letter. (To specify multiple drives, type each drive letter separated by a semicolon.)
 - Click Select. Select a drive. (To specify multiple drives, hold down the [CTRL] key or [SHIFT] key while selecting the drives.)
2. Click OK to save the settings.

Business Intelligence Gateway Path

The Paths tab of the Configuration dialog box allows you to configure the path for submitting documents/reports to BI Gateway. (This path is not available in the AppXtender Image Capture Configuration dialog box because it configures a feature that is not necessary in AppXtender Image Capture.) This path must be configured before submission to BI Gateway is allowed. For more information, refer to the *ApplicationXtender Document Manager User's Guide*.

To specify a BI Gateway path:

1. In the Business Intelligence Gateway path text box, type the path to the location where the `ERMx.INI` file was stored by AppXtender Reports Mgmt.
2. Click OK to save the settings.

Full Text Tab

The Full Text tab of the AppXtender Document Manager Configuration dialog box provides options for full-text indexing. The following is an explanation of the Full Text tab options that are available for your use. (The Full Text tab is not available on the AppXtender Image Capture Configuration dialog box, because it configures features that are not necessary in AppXtender Image Capture.)

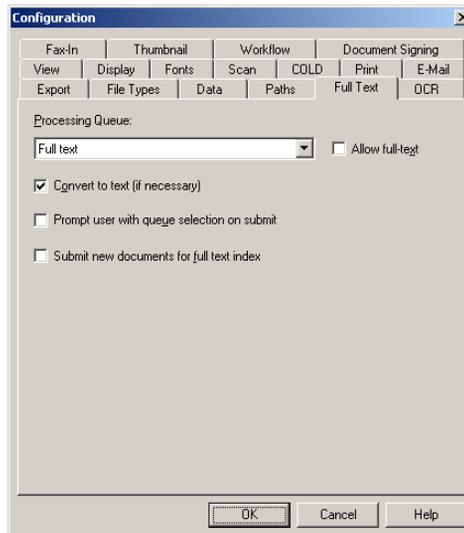


Figure 2-30 Configuration Dialog Box: Full Text Tab

Processing Queue

Use this option to choose the queue that will be used to process full-text indexing jobs. Full-text queues are created in the AppXtender Index Server Configuration dialog box or in AppXtender Queue Manager and can be selected at any AppXtender Document Manager workstation. Select the queue you want to use from the Processing Queue drop-down list.

When considering which queues to assign to each workstation, keep in mind that you cannot use more than one AppXtender Index Server for the same AppXtender application.

Allow Full-Text

Using this option, you can make all full-text commands unavailable to an AppXtender Document Manager workstation. This option may be useful when, for example, you are configuring a workstation for a user who does not need to use full text and you have a limited number of full-text licenses. If this option is enabled for an AppXtender Document Manager workstation when a user logs in to that workstation, a full-text license is used.

To make all Full-Text commands unavailable on an AppXtender Document Manager workstation:

1. Disable the Allow full-text option.
2. Restart AppXtender Document Manager. The full-text commands are now unavailable on this workstation.

Convert to Text (if necessary)

When this option is enabled, all image pages that you submit to the AppXtender Index Server for full-text indexing are automatically processed using optical character recognition (OCR). When this option is not selected, you must use OCR to process an image page before you can submit it. In addition, when the OCR option is not selected, only text pages can be submitted to the AppXtender Index Server.

When you submit an image to the AppXtender Index Server for full-text indexing, if the OCR (if necessary) option is enabled and if the image does require OCR processing, the result of the OCR processing is automatically plain text, regardless of the OCR Result Format configuration on the OCR tab.

Prompt User with Queue Selection

When this option is selected, AppXtender Document Manager will prompt you to pick a full-text queue every time a job is submitted to the AppXtender Index Server. Disabling this option will result in every full-text index job being submitted to the queue selected in the Processing Queue drop-down list.

Submit New Documents for Full Text Index

When this option is enabled, all new documents (that are imported or scanned into AppXtender) are automatically submitted to the AppXtender Index Server for full-text indexing. When the document is saved and closed, a message appears indicating that the full text index job has been submitted to the AppXtender Index Server. For instructions on configuring the AppXtender Index Server, consult

your AppXtender system administrator or refer to the *ApplicationXtender Index Server Administrator's Guide*. For instructions on creating a document, refer to the "Creating Documents" chapter of the *ApplicationXtender Document Manager User's Guide*.

OCR Tab

The OCR tab of the AppXtender Document Manager Configuration dialog box contains options for using optical character recognition (OCR) with AppXtender. (The OCR tab is not available on the AppXtender Image Capture Configuration dialog box, because it configures features that are not available in AppXtender Image Capture.)

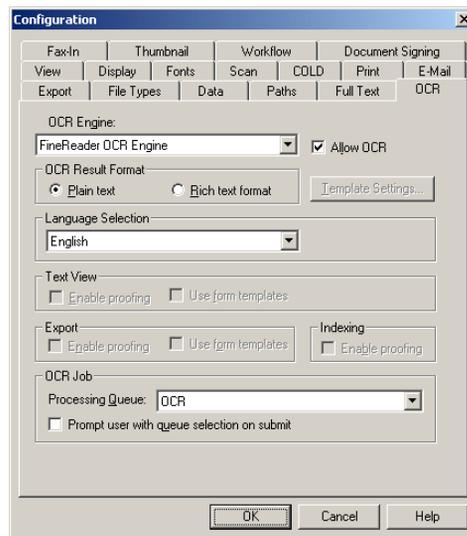


Figure 2-31 Configuration Dialog Box: OCR Tab

OCR Engine

Using this option, you can choose the OCR engine to be used by AppXtender. The "FineReader OCR Engine" option is always available as an OCR engine. (FineReader 6.0 OCR Engine is always installed with AppXtender Document Manager.) Other options are available only if you have purchased, installed, and configured the following products:

- ◆ If you have purchased, installed, and configured FineReader 7.0 Scripting Edition, the "FineReader 7" option becomes available.
- ◆ If you have purchased, installed, and configured FormReader 6.5, the "FormReader 6.5" option becomes available.

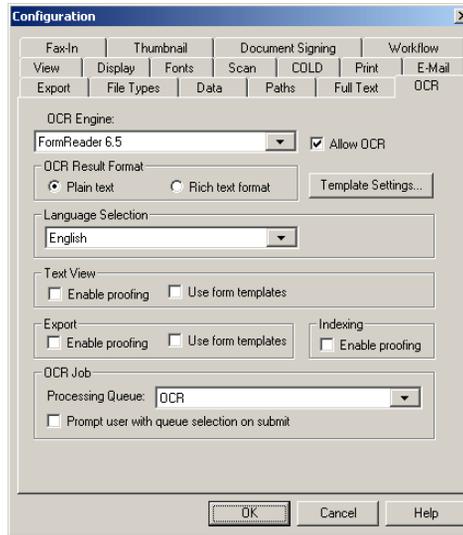


Figure 2-32 Configuration Dialog Box: OCR Tab: OCR Engines

When you select FineReader 7 or FormReader 6.5 as the OCR Engine, other options become available. For more information, see *Text View* on page 2-80, *Export* on page 2-80, and *Indexing* on page 2-81.

Allow OCR

Using this option, you can make all OCR commands unavailable to an AppXtender Document Manager workstation. This option may be useful when, for example, you are configuring a workstation for a user who does *not* need to use OCR.

To make all OCR commands unavailable on an AppXtender Document Manager workstation:

1. Click the Allow OCR check box to disable the option.
2. Restart AppXtender Document Manager. The OCR commands are now unavailable on this workstation.

OCR Result Format

Using this option, you can choose the OCR output file format. When you use OCR to process documents or pages in AppXtender, they are

stored in the selected file format. Select either Plain text (TXT), or Rich text format (RTF). The following table explains each file format.

Table 2-7 OCR Result Format Options

Option	Description
Plain text (TXT)	The plain text format is an ASCII text format, readable on MS-DOS/Windows operating systems. Plain text format retains formatting options that are available in MS-DOS text format, such as bold and italics.
Rich text format (RTF)	Rich text format is a format that can be read on all platforms. This format should be used if the document text will be exported for use on non-MS-DOS/Windows systems. Rich text format retains most formatting.

If Rich text format is selected, documents processed using OCR cannot be indexed using OCR proofing. Only plain text documents can be indexed using OCR Proofing.

Template Settings

If you have installed FineReader 7.0 Scripting Edition and have selected FineReader 7 as the OCR engine, or if you have installed FormReader 6.5 and have selected FormReader 6.5 as the OCR engine, you can configure the FineReader/FormReader template that AppXtender uses when you process an image with OCR.

Adding a Template

To add a template:

1. Create a template in FineReader (.BLK file) or FormReader (.FRM file). Make sure that the field names in the template match the field names in the AppXtender application. For more information on creating a template in FineReader or FormReader, refer to your FineReader or FormReader documentation.
2. On the OCR tab of the Configuration dialog box, click Template Settings. The OCR Form Templates dialog box appears.



Figure 2-33 OCR Form Templates Dialog Box

- Click Add. The Add OCR Forms Template dialog box appears.

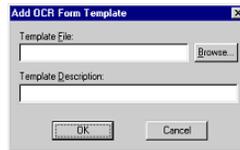


Figure 2-34 Add OCR Forms Template Dialog Box

- In the Template File text box, enter a path and file name for a FineReader or FormReader template file (.FRM).
- In the Template Description text box, type a description for the form template. This description is for identification purposes.
- Click OK. The form template is added to the list of form templates.

Configuring a Template

To configure a template:

- Click Template Settings. The OCR Form Templates dialog box appears.



Figure 2-35 OCR Form Templates Dialog Box

- Select a form template and click Set Default.
- If you want a list of form templates as you process each image using OCR, enable the Show list selection before form OCR option.
- Click Close.

Language Selection

The Language Selection drop-down list allows you to select from a variety of languages. Selection of a language that matches the images to be processed improves the results of OCR processing. For example, if you select Spanish, the results of OCR processing will be better for

images of Spanish text than for images of English text. The language selection in the OCR tab of the Configuration dialog box sets the default for the workstation. The languages that are available for selection depend on the OCR engine you chose.

Text View

If you have installed FineReader 7.0 Scripting Edition and have selected FineReader 7 as the OCR engine, or if you have installed FormReader 6.5 and have selected FormReader 6.5 as the OCR engine, you can use the Enable proofing and Use form templates options. The Enable proofing option configures AppXtender to enable OCR proofing when a text view is created. The Use form templates option configures AppXtender to use the selected template when a text view is created.

If the Use form templates option is enabled for exporting OCR results, the text view contains only the text specified by the template. Otherwise, the text view contains all of the text on the image.

Export

If you have installed FineReader 7.0 Scripting Edition and have selected FineReader 7 as the OCR engine, or if you have installed FormReader 6.5 and have selected FormReader 6.5 as the OCR engine, you can use the Enable proofing and Use form templates options. The Enable proofing option configures AppXtender to enable OCR proofing during export. The Use form templates option configures AppXtender to use the selected template during export.

If the Use form templates option is enabled for exporting OCR results, the exported file contains only the text specified by the template. Otherwise, the exported file contains all of the text on the image. For more information on OCR exporting, see *OCR Job* on page 2-81.

Indexing

If you have installed FineReader 7.0 Scripting Edition and have selected FineReader 7 as the OCR engine, or if you have installed FormReader 6.5 and have selected FormReader 6.5 as the OCR engine, you can use the Enable proofing option. The Enable proofing option configures AppXtender to enable OCR proofing during indexing.

OCR Job

The following topics describe the two ways that you can configure OCR jobs.

- Processing Queue** Use this option to choose the queue that will be used to process OCR jobs. OCR queues can be created in the AppXtender Index Server Configuration dialog box or in AppXtender Queue Manager and can be selected at any AppXtender Document Manager workstation. Select the queue you want to use from the Processing Queue drop-down list. (For more information on creating an OCR queue, consult your AppXtender system administrator or refer to the *ApplicationXtender Index Server Administrator's Guide*.)
- Prompt User with Queue Selection** When this option is selected, AppXtender Document Manager prompts the user to select an OCR queue each time a job is submitted to the AppXtender Index Server. Disabling this option results in every OCR job being submitted to the queue selected in the Processing Queue drop-down list.

Fax-in Tab

The Fax-in tab of the AppXtender Document Manager Configuration dialog box allows you to choose a Fax-in server. (The Fax-in tab is not available on the AppXtender Image Capture Configuration dialog box, because it configures features that are not necessary in AppXtender Image Capture.)

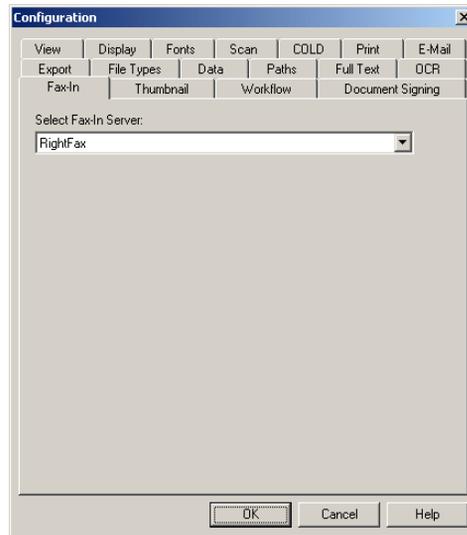


Figure 2-36 Configuration Dialog Box: Fax-in Tab

To configure the Fax-in tab:

- ◆ From the Select Fax-in Server drop-down list, select the server that you want to use. AppXtender supports each of the following Fax-in servers:
 - Castle FAX Press Server (Software Version 8.0.0/8.1.0)
 - RightFax (Software Version 9.0)

If you select RightFax, everything that you need to connect to the FAX server is included in AppXtender Document Manager. If you select a version of the Castle FAX Press Server, the Castle FAX Press client must be installed on the workstation. The Castle FAX Press client is not included with AppXtender Document Manager.

If you select RightFax, you can customize the way columns appear in fax server queue dialog boxes, which list each incoming or outgoing fax from a selected queue. Customizable options include column title, column order, which columns appear, and the type of faxes that appear. To modify these options, open the RFFIELDLIST.INI file, which is located in the *C:\Program Files\XtenderSolutions\Content Management* directory (or wherever AppXtender Desktop was installed), in Notepad and follow the instructions in the file to edit it.

Thumbnail Tab

The Thumbnail tab of the AppXtender Document Manager Configuration dialog box allows you to configure the Thumbnail view. (The Thumbnail tab is not available on the AppXtender Image Capture Configuration dialog box.)

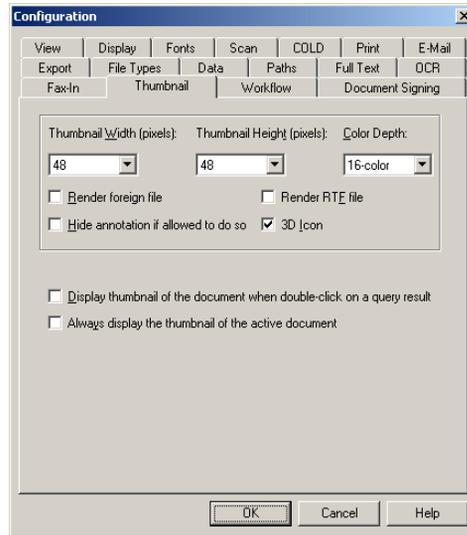


Figure 2-37 Configuration Dialog Box: Thumbnail Tab

The following table describes each option on the Thumbnail Tab:

Table 2-8 Thumbnail Tab Options

Option	Description
Thumbnail Width (pixels)	Allows you to specify the width of the thumbnails, in pixels. You can choose from 48, 64, 80, 96, and 128.
Thumbnail Height (pixels)	Allows you to specify the height of the thumbnails, in pixels. You can choose from 48, 64, 80, 96, and 128.
Color Depth	Allows you to specify the color depth of the thumbnails. You can choose from any of the color depths available for your monitor, including 16-Color, 256-Color, and True Color, up to 24-Bit Color. The color depth 16-Color is enough for most thumbnails.

Table 2-8 Thumbnail Tab Options (continued)

Option	Description
Render foreign file	Allows you to display thumbnails of foreign files as miniature images, rather than as icons. To display the thumbnail of a foreign file as a miniature image, you must also have the foreign file configured to display as an image, rather than as an icon.
Render RTF File	Allows you to display thumbnails of Rich Text Format (RTF) files as miniature images, rather than as icons.
Hide annotation if allowed to do so	Allows you to hide annotations on thumbnail images. You <i>must</i> have the Edit Annotations privilege to use this option.
3D Icon	Allows you to display thumbnails as a three-dimensional icon.
Display thumbnail of the document when double-click on a query result.	Allows you to display the Thumbnail view instead of the Document Display view when you double-click a record in the Result Set.
Always display the thumbnail of the active document.	Allows you to keep the Thumbnail view displayed, regardless of other activity on the AppXtender Document Manager window. The Thumbnail view changes to reflect the currently displayed document.

Document Signing Tab

The Document Signing tab of the Configuration dialog box allows you to specify a digital certificate and comment to be used by default when documents are signed. This tab is available only for applications in which the Document signing option has been enabled.

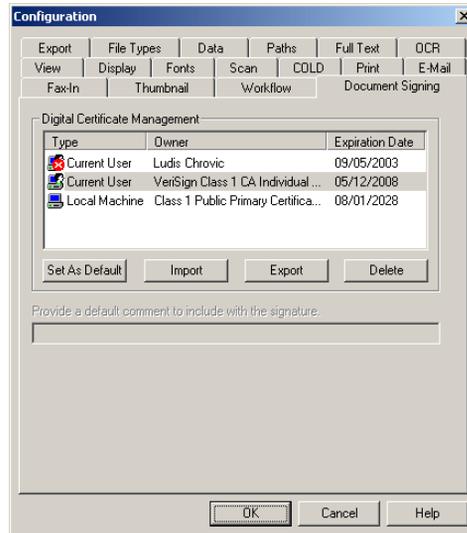


Figure 2-38 Configuration Dialog Box: Document Signing Tab

For more information, see the following topics:

- ◆ *Importing Digital Certificates* on page 2-87
- ◆ *Exporting Digital Certificates* on page 2-88
- ◆ *Specifying a Default Digital Certificate* on page 2-88
- ◆ *Clearing Default Digital Certificate* on page 2-88
- ◆ *Deleting Digital Certificates* on page 2-89

Importing Digital Certificates

Import a digital certificate on each AppXtender Document Manager workstation that will be used to sign AppXtender page versions.

To import digital certificates:

1. On the Document Signing tab, click Import. The Import Certificate dialog box appears.



Figure 2-39 Import Certificate Dialog Box

2. Specify the certificate file to import. (You can click Browse to locate the file.)
3. Specify the password for the private key.
4. Specify whether you want the certificate file to be available only for the current user or for any user on the computer.
5. Specify whether you want to enable strong private key protection.
6. Specify whether you want the certificate to be exportable.
7. Click OK.
8. On the Document Signing tab, click OK.

Exporting Digital Certificates

To export a certificate:

1. On the Document Signing tab, click Export. The Export Certificate dialog box appears.



Figure 2-40 Export Certificate Dialog Box

2. Specify the certificate file to export. (You can click Browse to locate the file.)
3. Specify the password for the private key.
4. Click OK.

Specifying a Default Digital Certificate

To specify a default certificate and comment:

1. On the Document Signing tab, select the certificate that you want to designate as default.
2. Click Set As Default. The default comment text box becomes available.
3. In the default comment text box, type the comment that you want to include each time a document is signed.
4. On the Document Signing tab, click OK.

Clearing Default Digital Certificate

To clear the default certificate designation:

1. On the Document Signing tab, select the default certificate.
2. Click Clear.
3. On the Document Signing tab, click OK.

Deleting Digital Certificates

To delete a certificate from configuration:

1. On the Document Signing tab, select the certificate that you want to delete.
2. Click Delete. A message appears asking you to confirm the deletion.
3. Click Yes.
4. On the Document Signing tab, click OK.

Workflow Tab

AppXtender Workflow is an AppXtender add-on module. The Workflow tab of the AppXtender Document Manager Configuration dialog box contains various options that enable you to use AppXtender Workflow in conjunction with AppXtender Document Manager. (The Workflow tab is not available on the AppXtender Image Capture Configuration dialog box.)

For details on configuring the Workflow tab and on using AppXtender Workflow, refer to the *ApplicationXtender Workflow User's Guide*.

Saving and Loading Settings

To make AppXtender system deployment easier for you, Save Settings and Load Settings features allow you to copy workstation settings from one AppXtender Document Manager workstation to another. You (or the user) customize the configuration of the AppXtender Document Manager workstation in several ways, and then you save the configuration. To copy the saved configuration to other workstations, you then just load the saved settings file on each workstation and all of the saved configuration settings are applied. The following topics detail the settings that are saved and explain how to save and load settings.

The Save Settings and Load Settings features are not available in AppXtender Image Capture.

Saving Settings

Once the AppXtender Document Manager workstation has been configured, you can save the customized settings to a configuration file. The saved settings file can be loaded on other AppXtender Document Manager workstations to copy the saved configuration settings to those workstations.

If a profile is created in one version of AppXtender, this profile cannot be applied to later versions of AppXtender. You must save a new settings file for each AppXtender release.

When you save settings for a workstation, AppXtender saves information about all of the options in the Configuration dialog box. When you load the settings on another workstation, the settings you saved are loaded for that workstation. If an option is enabled on the workstation where the settings are saved, the option is enabled on the other workstation once you load the settings.

In addition to Configuration dialog box options, Save Settings saves information about the views and toolbars on the AppXtender Document Manager window. If, for example, Allow Docking is enabled for the Query view on the workstation where you save settings, Allow Docking is enabled on the AppXtender Document Manager window of the second workstation once you load settings.

Additional information saved when you save settings includes default settings for annotations, the data source configurations on the

AppXtender Document Manager workstation, and the last directories used for several AppXtender Document Manager functions. For details on setting AppXtender annotation defaults, refer to the *ApplicationXtender Document Manager User's Guide*. For more information on setting up AppXtender data sources, refer to the *ApplicationXtender Core Components Guide*.

For a detailed list of the settings that are saved, see *Saved Workstation Settings* on page 2-95.

To save a workstation settings file:

1. Make the appropriate changes to the Configuration settings, annotation defaults, data source configuration, and window arrangement.
2. Select Save Settings from the File menu. The Save AppXtender Document Manager Settings dialog box appears.

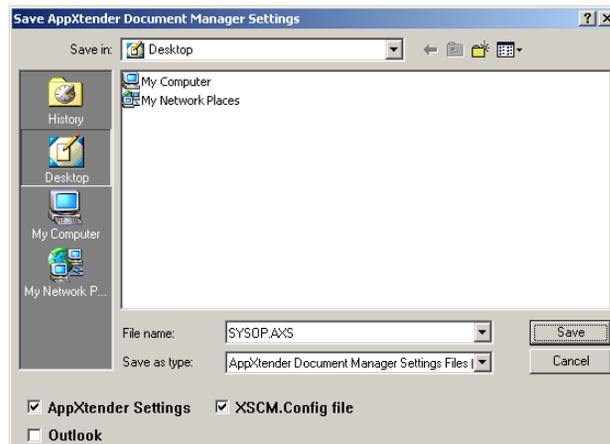


Figure 2-41 Save AppXtender Document Manager Settings Dialog Box

3. If you want to specify the type of file you are saving, from the Save as type drop-down list, select the type of files that you want to save. Your available choices are AppXtender Document Manager Settings Files (*.AXS) or All Files (*.*) .
4. Select the location to save the file. You can select the location from the Save in drop-down list and double-click a folder or file in the box below to open it, or enter a path and file name.
5. You also have the following options:

- To save the AppXtender Document Manager workstation configuration settings, leave the AppXtender Document Manager Settings check box enabled. Enabling this option saves all AppXtender Document Manager configuration settings, toolbar configuration, views, and status bar settings.
 - To save data source settings, leave the XSCM.Config check box enabled. For more information, see *Important Information about XSCM.CONFIG* on page 2-93.
 - To save settings from an AppXtender integration with Microsoft Outlook, such as targets and field mappings, enable the Outlook check box. (For information on the Outlook for AppXtender integration, refer to the *Microsoft Outlook Integration for ApplicationXtender Integration Guide*.)
6. Click Save. The file is saved in the specified location.

Important Information about XSCM.CONFIG

When you use AppXtender Admin, Component Registration, Data Source Selector, or web service, settings are read from and written to *C:\Documents and Settings\All Users\Application Data\XSCM.CONFIG*. Each component writes different settings to this file.



CAUTION

Do not edit or distribute the XSCM.CONFIG file.

The recommended method for providing each user with access to a data source group is to have each user use the AppXtender Data Source Selector to locate a data source, as described in the *ApplicationXtender Document Manager User's Guide*.

However, the XSCM.Config file check box on the Load AppXtender Document Manager Settings dialog box and the Save AppXtender Document Manager Settings dialog box provides another method for distributing data source connectivity. When you save workstation settings with the XSCM.Config file check box selected, the contents of the *XSCM.CONFIG* file are included in the AppXtender Document Manager settings file. The contents of the *XSCM.CONFIG* file are located at the end of the AppXtender Document Manager settings file starting with line [XSCM.CFG]. The AppXtender Document Manager settings file can be distributed to other AppXtender Document Manager workstations. When your users load an AppXtender Document Manager settings file that has an [XSCM.CFG] section in it, with the XSCM.Config file check box selected, a new *XSCM.CONFIG*

file is created. Each user is then prompted to log in to the default data source, as specified in the new *XSCM.CONFIG* file.



CAUTION

If you choose to use this method for distributing data source connectivity, you must take both of the following precautions:

- ◆ Ensure that AppXtender Admin, Component Registration, Web Server, Rendering Server, and web services have not been installed on any of the computers on which you intend to save or load the AppXtender Document Manager workstation settings.
- ◆ Ensure that no changes are made in AppXtender Admin or Component Registration on any computer in your AppXtender system between saving and loading AppXtender Document Manager workstation settings.

If problems occur after deployment on an AppXtender Document Manager workstation, use the AppXtender Data Source Selector to locate a data source, as described in the *ApplicationXtender Document Manager User's Guide*. If problems occur after deployment on a workstation with AppXtender Web components, run AppXtender Component Registration to register components again as described in the *ApplicationXtender Web Access Administrator's Guide*.

Saved Workstation Settings

The following table lists the settings that are saved when you save settings for an AppXtender Document Manager workstation:

Table 2-9 Saved Workstation Settings

AppXtender Document Manager Configuration	Saved Settings
AppXtender Document Manager Window Configuration	<ul style="list-style-type: none"> • The tab of the Configuration dialog box that was most recently viewed • The data source set as the active data source (shown in bold in the Application view) • The application set as the active application (shown in bold in the Application view) • Allow Docking option for the Application view • Allow Docking option for the Query view • Allow Docking option for the Thumbnail view • Allow Docking option for the AppXtender Workflow Workbox • Hide On Use option for the Application view • Hide On Use option for the Query view • Hide On Use option for the AppXtender Workflow Workbox • Float as MDI Window option for the Application view • Float as MDI Window option for the Query view • Float as MDI Window option for the Thumbnail view • Float as MDI Window option for the AppXtender Workflow Workbox • New Document Index view location • Modify Document Index view location • Batch Index view location • Batch Index view column settings • Display of Enhance Image dialog box
Annotation Settings	<ul style="list-style-type: none"> • Foreground color • Background color • Line width • List of most recently used rubber stamp annotations for each AppXtender application • Default annotation group for each data source
Toolbars	<ul style="list-style-type: none"> • For all toolbars: <ul style="list-style-type: none"> Small icons Large icons • For each toolbar: <ul style="list-style-type: none"> Display location Whether the toolbar is hidden

Table 2-9 Saved Workstation Settings (continued)

AppXtender Document Manager Configuration	Saved Settings
Query Result Set column Configuration	<ul style="list-style-type: none"> • The settings for result set column display in the result set for each application
View Tab Configuration	<ul style="list-style-type: none"> • Image Size <ul style="list-style-type: none"> Fit to window Fit to window height Fit to window width Actual size Use zoom setting • Zoom settings are pixels • Display text view of page • Scale-to-gray • Restore last layout at startup • Use KeyView to display foreign files • Allow map of unknown data sources to existing data sources
Display Tab Configuration	<ul style="list-style-type: none"> • Screen DPI <ul style="list-style-type: none"> Vertical Horizontal • Maximum Query Results • Sort result set automatically • Sort Order of Document ID <ul style="list-style-type: none"> Ascending Order Descending Order • PgUp/PgDn in dual-page view <ul style="list-style-type: none"> Next/previous 2 pages Next/previous page
Fonts Tab Configuration	<ul style="list-style-type: none"> • Screen Fonts • Printer Fonts • Simulate Box Drawing Characters <ul style="list-style-type: none"> Enable Support for Form Text Enable Support for Data Text
Scan Tab Configuration	<ul style="list-style-type: none"> • Remove blank pages (and Threshold) • Synchronized scan • Scanner manual feed timeout

Table 2-9 Saved Workstation Settings (continued)

AppXtender Document Manager Configuration	Saved Settings
COLD Tab Configuration	<ul style="list-style-type: none"> • Cache forms • Allow paste text • Allow zoom • Display as image only • Form Overlay Settings <ul style="list-style-type: none"> Screen Printer • Default Color Bar settings <ul style="list-style-type: none"> Show Lines Color
Print Tab Configuration	<ul style="list-style-type: none"> • Print original size • Dithering • Toolbar Print Button • Acceleration <ul style="list-style-type: none"> None XipPrint Talaris Quick PCL • Endorsement <ul style="list-style-type: none"> Endorse printed pages Position Text
OCR Tab Configuration	<ul style="list-style-type: none"> • OCR Engine • Allow OCR • OCR Result Format • Template Settings • Language Selection • Text View <ul style="list-style-type: none"> Enable proofing Use form templates • Export <ul style="list-style-type: none"> Enable proofing Use form templates • Indexing <ul style="list-style-type: none"> Enable proofing • Processing Queue • Prompt user with queue selection on submit

Table 2-9 Saved Workstation Settings (continued)

AppXtender Document Manager Configuration	Saved Settings
Fax-in Tab Configuration	<ul style="list-style-type: none"> • Select Fax-in Server
Thumbnail Tab Configuration	<ul style="list-style-type: none"> • Thumbnail Width (Pixels) • Thumbnail Height (Pixels) • Color Depth • Render foreign file • Render RTF file • Hide annotation if allowed to do so • 3D icon • Display thumbnail of document when double-click result set • Always display the thumbnail of the active document
Workflow Tab Configuration	<ul style="list-style-type: none"> • Workflow Server Name • Workflow Database Name • Use AppXtender user name and password for login • Always open latest revision
Document Signing Tab Configuration	<ul style="list-style-type: none"> • Default certificate • Default comment
E-Mail Tab Configuration	<ul style="list-style-type: none"> • Black &White Images Format • Pseudo Color Images Format • True Color Images Format <ul style="list-style-type: none"> • JPEG Quality Factor • Text Format • Use multi-page files • Vendor <ul style="list-style-type: none"> • Microsoft (MAPI32) • CC: Mail (SMI32)
Export Tab Configuration	<ul style="list-style-type: none"> • Black &White Images Format • Pseudo Color Images Format • True Color Images Format <ul style="list-style-type: none"> • JPEG Quality Factor • Text Format • Use multi-page files
File Types Tab Configuration	<ul style="list-style-type: none"> • File types that have been added and their associated file extensions

Table 2-9 Saved Workstation Settings (continued)

AppXtender Document Manager Configuration	Saved Settings
Data Tab Configuration	<ul style="list-style-type: none"> • Enable dual data entry • Disable query window • Database connect & drop • Check for matching index • ODMA support • Allow remember password • Prompt for checkout when open • Enable ODMA Attribute Search • Auto Logout • Date Field with 2-digit Year Max Future Years Setting • Image Storage Format • Black & White • 4/8-Bit Color • True Color • Separate multi-page TIFFs • JPEG Quality Factor
Paths Tab Configuration	<ul style="list-style-type: none"> • Local write path use • Local write path • Personal search path • Volume label search drives

Table 2-9 Saved Workstation Settings (continued)

AppXtender Document Manager Configuration	Saved Settings
Full-Text Tab Configuration	<ul style="list-style-type: none"> • Processing Queue • Allow Full text • Convert to text (if necessary) • Prompt user with queue selection on submit • Submit new documents for full text index
Directories	<ul style="list-style-type: none"> • Last import directory • Last export directory • Last Batch Create directory • Last Batch Import directory • Last OCR export directory
Data Source Configuration	<ul style="list-style-type: none"> • Default data source setting • Selected data sources • For each data source: <ul style="list-style-type: none"> Description Encoded data source connection string Full-text queues OCR queues Print queues

Loading Settings

When you choose Load Settings from the File menu, AppXtender Document Manager displays the Load AppXtender Document Manager Settings dialog box. This dialog box allows you to load previously saved configuration settings on an AppXtender Document Manager workstation. The settings consist of the AppXtender Document Manager settings that are found in the Configuration dialog box, toolbar configuration, AppXtender Document Manager views, and status bar settings, user data source settings, and system data source settings.

When you attempt to open AppXtender Document Manager, if a message appears indicating that AppXtender cannot find the data source or licensing information it needs to connect to the AppXtender database, you can load settings to provide AppXtender with connection information.

To load a workstation settings file:

1. From the File menu, select Load Settings. The Load AppXtender Document Manager Settings dialog box appears.

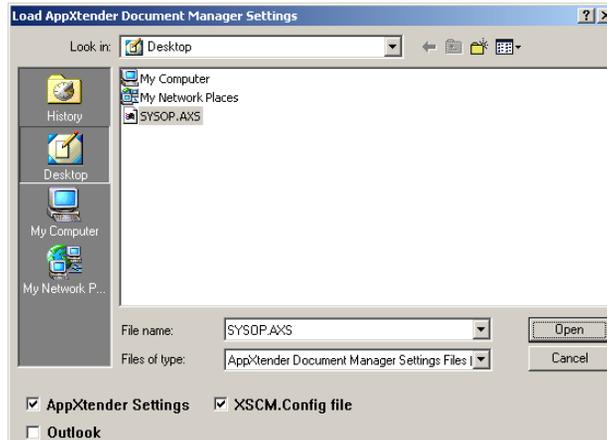


Figure 2-42 Load AppXtender Document Manager Settings Dialog Box

2. Select the file name. You can select the appropriate folder from the Look In drop-down list and double-click a folder or file in the box below to open it, or enter a path and file name and click Open.
3. Specify which settings are loaded from the file. You have the following choices:
 - To load the AppXtender Document Manager workstation configuration settings, leave the AppXtender Document Manager Settings check box enabled. Enabling this option loads all Configuration settings, toolbar configuration, AppXtender Document Manager views, and status bar settings.
 - To load the data source settings, leave the XSCM.Config check box enabled. For more information, see *Important Information about XSCM.CONFIG* on page 2-93.
 - To load settings such as targets and field mappings from an AppXtender integration with Microsoft Outlook, enable the Outlook check box. (For information on the Outlook for AppXtender integration, refer to the *Microsoft Outlook Integration for ApplicationXtender*)

If AppXtender is having trouble connecting to the AppXtender database on your computer, you can copy the data source settings for a workstation that can successfully connect to the database and load the data source settings on your computer. If you choose not to load AppXtender Document Manager Settings when you load settings, you can load the data source configuration without affecting the rest of your AppXtender configuration.

4. Click Open. The Login dialog box appears.

Your login procedure may vary depending on the security provider in use for the current data source. For information, refer to the *ApplicationXtender Core Components Administrator's Guide*.

You must re-login to AppXtender Document Manager to load the saved profile.

5. In the User Name text box, type a user name that is valid for the default data source.
6. In the Password text box, type your password.
7. Click Login. AppXtender resets your AppXtender Document Manager workstation to the new workstation profile settings.

If AppXtender is unable to connect to the database, check the database to make sure that it is running and accessible.

Maintaining the AppXtender Desktop Installation

The following sections describe how to modify, repair, or remove an AppXtender Desktop installation:

- ◆ Modifying an AppXtender Desktop InstallationA-2
- ◆ Repairing an AppXtender Desktop Installation.....A-4
- ◆ Uninstalling AppXtender Desktop 5.30.....A-5

Modifying an AppXtender Desktop Installation

This section describes how to modify an AppXtender Desktop installation. These instructions may be necessary if you need to use a component of AppXtender that was not included during the original installation.

To modify an AppXtender Desktop installation:

1. Close all AppXtender components and ensure that the AppXtender Index Server is not running.
2. Obtain the installation files for AppXtender Desktop. You have the following choices:
 - Download the `Desktop_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. From the Windows Start menu, select Settings and then Control Panel. From the Control Panel menu, select Add/Remove Programs. The Add/Remove Programs dialog box appears. Select ApplicationXtender Desktop and click Change.

The AppXtender Desktop setup wizard appears, beginning with the Application Maintenance page.
4. Enable the Modify option and click Next. The Select Features page appears.
5. Indicate which components you want to include and which components you want to exclude. For details, see *Select Features Page* on page 1-12.
6. Click Next. The Ready to Modify the Application page appears.

7. Click Next. AppXtender Desktop begins the modification process. When AppXtender Desktop has been modified, the next page of the wizard indicates a successful installation.
8. Click Finish.

Repairing an AppXtender Desktop Installation

This section describes how to repair an AppXtender Desktop installation. These instructions may be necessary if AppXtender Desktop files or registry keys have been deleted.

To repair an AppXtender Desktop installation:

1. Close all AppXtender Desktop components and ensure that the AppXtender Index Server is not running.
2. Obtain the installation files for AppXtender Desktop. You have the following choices:
 - Download the `Desktop_5.30.xxx.zip` file from one of the following locations to a temporary directory on your computer:
 - The Documentum download center (<https://documentum.subscribenet.com>)
 - The FTP site (<ftp.emc.com>\Software\AppXtender5.30\Desktop)

Extract the installer zip file to the temporary directory. If you download multiple products, download all of them to the same temporary directory.

 - Insert the AppXtender Desktop/Web setup CD-ROM into your CD-ROM drive.
3. From the Windows Start menu, select Settings and then Control Panel. From the Control Panel menu, select Add/Remove Programs. The Add/Remove Programs dialog box appears. Select ApplicationXtender Desktop and click Change.

The AppXtender Desktop setup wizard appears, beginning with the Application Maintenance page.
4. Enable the Repair option and click Next. The Ready to Repair the Application page appears.
5. Click Next. AppXtender Desktop begins the repair process. When AppXtender Desktop has been repaired, the next page of the wizard indicates a successful installation.
6. Click Finish.

Uninstalling AppXtender Desktop 5.30

This section describes how to uninstall AppXtender Desktop 5.30. These instructions may be necessary when you upgrade from 5.30 to a later release.

To uninstall AppXtender Desktop 5.30:

1. Close all AppXtender components and ensure that the AppXtender Index Server is not running.
2. From the Windows Start menu, select Settings and then Control Panel. From the Control Panel menu, select Add/Remove Programs. The Add/Remove Programs dialog box appears. Select ApplicationXtender Desktop and click Change.

The AppXtender Desktop setup wizard appears, beginning with the Application Maintenance page.

3. Enable the Remove option and click Next. The AppXtender Desktop Uninstall page appears.
4. Click Next. AppXtender Desktop begins the uninstall process. When AppXtender Desktop has been uninstalled, the next page of the wizard indicates a successful uninstallation.
5. Click Finish.



CAUTION

Restart your computer before installing the latest release of AppXtender Desktop.

This glossary contains terms related to ApplicationXtender (AppXtender) components. Many of these terms are used in this manual.

A

accessible security

Accessible security grants access to the users in the group for only documents with index field values matching the secured value list. (See also Document Level Security.)

annotation

An annotation is a note or a shape added to a document or batch page, typically to focus attention on a particular part of the page. Users can use annotations to comment on the contents of a page, block areas of the page from view, or highlight important information. When a user creates an annotation, it is associated with the AppXtender page on which he or she created it. Annotations are edited and stored separately from the image, but they are displayed along with the image in ApplicationXtender Document Manager and Web Access. The types of annotations available include text, highlighting, lines, arrows, shapes, and rubber stamps.

annotation group

Annotation groups allow you to create associations between users, groups, and specific annotations. You can specify which users and groups can view or modify specific annotations, and which users and groups can hide or modify specific redactions.

appender

An appender allows you to select the specific ApplicationXtender Web Access .NET or Rendering Server information you want to log and to publish that information to a specific reporting venue.

application	An AppXtender application is an index-driven data storage structure where documents can be stored and retrieved. An AppXtender application is based on an index that is composed of one or many fields. AppXtender applications are created in ApplicationXtender Application Generator (AppXtender AppGen).
application security profile	<p>Application security profiles, like global security profiles, allow you to grant a particular set of privileges to a user or group of users. You can define different privileges for a user or group of users in each application.</p> <p>When a profile is application-specific, however, the privilege settings are not carried over to a new application when it is created. If a group of users has an application-specific profile for a certain application, but no global profile, then when a new application is created, the members of the group will not be able to access the new application. Application-specific security settings override global security settings.</p>
ApplicationXtender Auto Index Import	AppXtender Auto Index Import allows use of the <F7> key to import index values from a text file, so users adding documents can automatically populate indexes using the imported data. Auto Index is ideal for the import of index records that are applicable to only one document. In an Auto Index Import table, once a record (or a group of index values) has been used to index a document, the record is deleted.
ApplicationXtender Index Image Import	AppXtender Index Image Import allows you to import index data and document files in a single step. A text file is required which contains a line of text for each document to be imported, with a value for each index field and a reference to the location of the file to be imported. No manual document indexing is required.
ApplicationXtender Index Server	ApplicationXtender Index Server is an optional module that adds full-text indexing and OCR functionality to AppXtender systems.
ApplicationXtender Key Reference Import	AppXtender Key Reference Import allows use of the <Tab> key to import index values from a text file. Key Reference is most effectively used in situations where each imported record may describe several documents. Key Reference Import maintains the index records in the Key Reference table even after records have been used to index documents. Any change made to a record in the Key Reference table is reflected in the indexes of all documents described by that record.

audit trail	The Audit Trails feature allows you to track user activity within the AppXtender system. System-wide activities such as the creation, modification, and deletion of applications, users, and groups can be tracked. You can also track user activity in applications by tracking items such as the creation and deletion of documents, the addition of pages, and the modification of index information for documents. By default, AppXtender logs audit trail events to a table in the AppXtender database. You can configure audit trails to log to this table, to a log file, or to both locations.
authentication	Authentication requires all users to enter a valid user name and password to access software modules. Authentication ensures that each user is who he or she claims to be.
authorization	Authorization is the granting of specific access privileges according to the user name. Security profiles contain information pertaining to a user's specific privileges within the AppXtender system.
C	
check in/check out mode	When an AppXtender application or an AppXtender Document Manager workstation is in check in/check out mode, use of revision control with AppXtender documents is mandatory. Users must check out a document to modify it. If they do not check the document out, it is opened in read-only mode and it cannot be modified.
COLD	COLD (computer output to laser disk) data is report data generated for existing applications. COLD data can be added to AppXtender as documents through the use of ApplicationXtender Reports Management (AppXtender Reports Mgmt).
collection	A collection is a Verity full-text database.
D	
data source	A data source is the means by which AppXtender accesses data from a database. When a data source is defined, an OLE DB data provider is configured to access the database. All of these characteristics in combination – where the data is stored, the format of the data stored, and the data provider used to access the data – comprise the data source.

data source group	A data source group in ApplicationXtender Administrator (AppXtender Admin) associates a list of data sources with everything that has been configured in AppXtender Admin, such as ApplicationXtender Web Access (AppXtender Web) settings and connections to License Server computers. This feature provides convenience in that the work of configuration does not have to be repeated every time you create a data source.
database	A database is a collection of data tables of a particular database format (such as Oracle or Microsoft SQL Server). AppXtender uses databases to store application information. When an application is created, details such as the field definitions and security information are stored in database tables. Once documents are added to an application, index information is stored in a table, as are the pointers to the location of the documents.
document	A document is a page or group of pages stored in an application and identified by index information. Each page of a document is comprised of a single object such as a scanned image file or a word processing document. To create a new document, users add an object to an application and attach index information to it. Subsequent objects can be added as additional pages of the same document.
Document Level Security	Document Level Security (DLS) pinpoints user access within an AppXtender application. With DLS, you can deny a group of users access to any classified or sensitive document(s), without restricting access to other documents in the application. DLS can also be configured to grant a group of users access to only a specific set of documents in an application.
E	
ERM	ERM (enterprise report management) data is report data generated for existing applications. ERM data can be added to AppXtender as documents through the use of ApplicationXtender Reports Management (AppXtender Reports Mgmt).
extended applications	Extended applications are AppXtender applications that can be called from within other software applications, adding document storage and processing functions.

F

full-text Users can index documents for full-text searching by submitting them to the AppXtender Index Server. With a full-text search, users can find documents even if they do not know any of the index values. Users can also use full-text searching to refine an index value search.

G

global security profile Global security profiles can be established to automatically assign a uniform set of access privileges for a user or group of users every time a new application is created. When a global profile exists for a user or group of users, the privileges assigned in that profile are automatically assigned for every application created. If a user or group of users does not have a global profile, an application-specific profile must be created for that user or group before they can access an application.

grab bar An AppXtender Document Manager docked view has a grab bar. A grab bar is similar to a title bar except that it does not contain a title.

I

impersonation account The AppXtender Index Server impersonation account grants security privileges to AppXtender Index Server and is essential for the AppXtender Index Server to operate properly. AppXtender Index Server uses the AppXtender Index Server impersonation account to access remote and server resources, including AppXtender document paths, the License Server, the registry, and the image repository (in some cases, the DiskXtender Document Server).

import specification A specification is a set of rules that AppXtender follows when importing data from an import file using the AppXtender Auto Index Import, Index Image Import, or Key Reference Import wizard.

inaccessible security Inaccessible security denies access to the users in the group for documents with index field values matching the secured value list. (See also Document Level Security.)

index An AppXtender index contains a group of fields where descriptive information pertaining to documents can be stored. This group of field definitions is used by AppXtender when storing index information within an application.

J

JDBC Java Database Connectivity (JDBC) is a programming interface for accessing data in a Java 2 Edition application such as the ApplicationXtender Web Access J2 (AppXtender WebJ2) deployment model. For more information, refer to the *ApplicationXtender Web Access J2 Administrator's Guide*.

N

node A node is an element of a tree structure such as in AppXtender Admin, AppGen, Document Manager, or Reports Mgmt. A node can be expanded to reveal subnodes or can be collapsed.

O

OCR Users can process bi-tonal images using optical character recognition (OCR). This process converts an image of text into text. After a user processes an image using OCR, it can then be submitted to the AppXtender Index Server for full-text searching.

ODMA Open Document Management API (ODMA) support allows users to work with AppXtender documents within other ODMA-compliant applications.

OLE DB OLE DB is a programming interface for accessing data, and is a fundamental building block for storing and retrieving data using Microsoft's Data Access Components (MDAC). OLE DB provides flexible data architecture that offers applications like AppXtender efficient access to databases. Data is accessed through OLE DB data providers

P

page The word "Page" typically implies a single entity. Since AppXtender supports multiple object types, the term "page" is redefined within AppXtender to mean a single object. A very long word processing file is considered a page to AppXtender. A page could also be, for example, a single scanned image, a 30-minute video clip, or an audio recording. Each page of a document has the same index record attached.

privileges Privileges govern the ability of a user or group of users to access functions in AppXtender.

R

redaction A redaction is a filled and opaque annotation shape that can be used to secure or hide portions of image and text pages. Users can apply redaction to all available annotations. When applied, the area of the page behind the redaction is not visible.

S

security Security is the combination of authentication and authorization.

security mapping When AppXtender Migration is used to migrate documents and security information, the administrator has the option to map users and groups in the source database to users and groups in the destination database. Similarly, when the ApplicationXtender Media Distribution (AppXtender Distribution) Extraction Wizard is used to extract AppXtender documents and security information before the creation of an AppXtender Distribution CD-ROM, the administrator has the option to map users and groups in the source database to users and groups in the database on the CD-ROM (or in the database where the CD-ROM will be reintegrated).

security provider Security providers implement authentication, which requires all users to enter a valid user name and password to access most modules. AppXtender Admin offers two pre-packaged security providers (CM and Windows) to ensure that each user is who he or she claims to be. You can also create a directory service security provider, if necessary.

W

write paths Write paths are used to instruct AppXtender where to store documents, annotations, OCR output, and the ProIndex full-text database for a particular AppXtender application.

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