Index

Introduction

The Correspondence Filing System™, CFS,   provides a system to file, index and retrieve documents and files under the windows environment.   The system stores files, called documents,   in an orderly well defined data base.   The documents are stores in one compact database including indexing information.   This allows for easy access through the windows graphical user interface.   By viewing the index information displayed on the screen the user can select a document, extract it from the data base and launch the application required to access it.   The simplified menu system and structure of CFS provides quick start up for new users and access to new applications to improve productivity of the users.

CFS can store any type of Document, word processing, Spread sheet data, Fax files, Images, Text or Binary data and program files.   The type of data and structure of the data is not considered by CFS when storing or retrieving.   CFS does however know of some special file types. These include:

> Windows Word <u>DOC</u> file (.DOC)
> <u>TIFF</u> image files (.TIF)

When these files are detected CFS fills its index information from the appropriate fields from in the file.   The user has the option to change this information if desired or accept the default information.

The user can examine the index information of an FOLDER to locate the desired document or search the index and document for a text string.   Once the desired document has been located it can be extracted from the folder to its original file name or a new one entered. Once extracted the application used to process the document can be started and the document automatically opened (if supported by the application).

CFS builds a database of index information and the actual file data. This database replaces the original file, the file is optionally deleted after it has been inserted in to the database. This eliminates the problem of filename clutter that can occur when attempting to give each file a meaning name.

Getting Started

Installing CFS

CFS is provided with an automatic installation program.   This program can be used to install the program and insert it's <u>ICON</u> in to the Windows MAIN program group.   It also set up the configuration information in the <u>Profile Strings</u> in your <u>WIN.INI</u> file.

You can also install CFS yourself with out the <u>INSTALL</u> program.

Using the INSTALL Program

To run the INSTALL program select the <u>Run</u> command from the Program Managers File Menu. Enter:

      A:INSTALL

The INSTALL program will be started, you will be prompted for information on how you want CFS installed.   These options must be specified for CFS to operate correctly.   Once the options have been entered the INSTALL program copies CFS to your hard disk and sets up the configuration information in the Windows <u>WIN.INI</u> file.   The CFS <u>ICON</u> is installed in the Main program group and CFS is ready to go to work for you.

The first thing you must do is to create the FOLDERS that will hold your Documents.   Do so by using the <u>New Folder</u> command in the File menu.   You can create additional FOLDERS at any time. You will probably need to do so from time to time.

Open one of your new FOLDERS using the File <u>Open Folder</u> command.   Use the <u>Add</u> command to add documents to the FOLDER.   Use the <u>Extract</u> command to extract a copy of the document for editing, printing or any other use.   The original remains in the database even if newer copies of the document are added.   This provides a revision history of the document.

Manual Installation

The manual installation process is very simple, the steps are as follows:

1. Copy CFS.EXE to the Windows directory.
2. Edit the <u>WIN.INI</u> file, add CFS=CFS.EXE ^.CFS to the extensions section.
3. Run Windows, add CFS to the Program Group or group of your choosing, using the Program Manager File <u>New</u> command.
4. Start CFS and create the new FOLDERS to contain your documents.

Customer Support

To obtain customer support on this product contact us 9:00AM to 4:30PM eastern time, Monday thru Friday except Holidays:

CSD Incorporated
PO Box 253
Sudbury Massachusetts 01776

(508) 443-2750

We can also be reached on the following Electronic Mail services:

PRODIGY   RPNV62A

COMPUSERVE   70312,2245

We check these services daily and make a best effort to answer inquires with in 24 hours.

Operation

Open Folder ViewTM

The Open Folder ViewTM provides the user with a flexible presentation of the contexts of the Folder.

The display options section of the <u>Settings</u> command allow the user to configure the information in the Open Folder ViewTM.   The Open Folder ViewTM is the main display screen and the main user interface to the FOLDER information.   To display the information for an item in the data base, select it to set the check box.   All Items remain in the data base, only the checked ones are displayed.   At any time you may change the selected information. The Open Folder ViewTM will be updated to show the new selections.

File

The File menu group provides access to the commands to create, open and close folders. This group also contains commands to configure the index entries presented on the main display view.

FILE

    New Folder
    Open Folder
    Close Folder
    Print
    Settings
    Exit
    About CFS

New Folder

The *New Folder* command is used to create a new FOLDER.   The FOLDER file is created and formatted to contain index and document information.   Enter the file name for the new FOLDER.   The file name may contain the complete path or the current default will be used. If an existing FOLDER was being displayed it is closed and the new FOLDER is opened and displayed.

Open Folder

The *Open Folder* command is used to open an existing FOLDER to display its contents.   If another FOLDER was being displayed it is automatically closed before the selected FOLDER is opened.

Close Folder

The *Close Folder* command is used to close an open FOLDER.

Print

The *Print* command is used to print the index for hard copy reference.   The index fields printed are selected using the <u>Settings</u> command, they will be the currently displayed fields.

Settings

The *Settings* command is used to configure the operating characteries of the CFS program. The configuration setup is stored in the Windows <u>WIN.INI</u> file.   It is accessed each time CFS is started so that CFS is set up to the same configuration as the last section.

The Setting dialog box controls the following options:
<u>Document ID</u>
<u>File Name</u>
<u>File Size</u>
<u>Date</u>
<u>To</u>
<u>From</u>
<u>Subject</u>
<u>Delete Added Document</u>
<u>Search Index</u>
<u>Search Document Text</u>
<u>Match Upper/Lower Case</u>
<u>Launch to Application</u>
<u>Delete if NOT modified</u>
<u>Double Click Extract</u>
<u>Double Click View</u>

Document ID

The *Document ID* is an incrementing count of the number of documents in the folder

File Name

The *File Name* is the MS-DOS file name of the file when it was stored in the CFS data base. The disk and path name are removed, only the base file name is preserved.

File Size

The *File Size* is the number of bytes or characters in the MS-DOS file when it was stored in the CFS data base.

Date

The *Date* field is the date entered when the file was stored in the CFS data base.

To

The *To* field is the name of the person the document was addressed to. This field is limited to 20 characters.

From

The *From* field is the name of the person sending the document.   This field is limited to 20 characters.

Subject

The *Subject* field is a brief description of the document contents.   This field is limited to 40 characters.

Delete Added Document

Once the document has been added to the CFS database the original file is usually no longer needed and can be deleted.   If this box is checked the file will be deleted.   The advantage of CFS is that the small files with letters or memos can be eliminated and managed through the <u>Open Folder View</u>.

WARNING

Warning, Make MULTIPLE BACKUPS of important information.   Never rely on one single source for the storage of important information.   CSD assumes no liability for lost or destroyed data, see the License Agreement.

Launch to Application

When a document is extracted from the data base it is written into a fie.   CFS can then launch the application that created the document.   If this box is checked CFS will attempt to launch the application and pass the file name on its command line.

In order to launch to an application an association in the Windows <u>WIN.INI</u> file must exist for the extension.   You can use the Windows File Manager command *Associate* to set up any associations that do not already exist or change ones that do.

Search Command Configuration

This group of options established the operating mode of the search command.You can set up the search command to operate in a way that best suites the way you work and the way you set up your FOLDERS.

The Search command configuration options are:

    Search Index
    Search Document Text
    Match Upper/Lower Case
    Launch to Application
    Delete if NOT Modified

Search Index

The *Search Index* option enables search to consider the following fields in the FOLDER index:
- File Name
- To
- From
- Subject

The search of the index information is very fast and should be the primary search.

Search Document Text

The *Search Document Text* option enables search to consider the document text.   The document text is always stored on the disk.   Searching the text is therefor much slower. For best performance only enable this option after the Search Index failed to return the desired results.

Match Upper/Lower Case

The *Match Upper/Lower Case* option enables search to consider the case of the text. Documents match only if the case matches.

Exit
The *Exit* command terminates CFS.

About

The *About* command displays the copyright and version information.

The Release Notes for this version of the product can be viewed using the <u>New</u> button.

Search

The *Search* command is used to locate Documents in the open FOLDER that contain the desired string of text.   Options allow you to configure the search for index or document text and character case.

For quick searches enable only the index information. Searching the document text may take long amounts of time due to the slow speed of the disk and the size of the document.
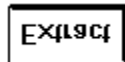
Documents found to match the search string are shown in a list box.   Use the scroll bars to look through the list.   Select a document by clicking on it.   Use the <u>Extract</u> button to extract a copy of the document to a file on the disk.
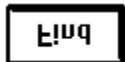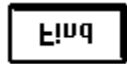
The <u>Find</u> button starts the search.

The <u>View</u> button allow you to view the selected document.

The <u>Extract</u> button exports the document to you disk.

Find

Find The *Find* button initiates the search process.   The search can also be started by pressing ENTER.   Using the selection criteria the search is preformed.   Any matching documents are displayed in the <u>list box</u>.

Extract

The *Extract* command copies a document to a file on the disk.   Select the document by clicking on it.

If <u>Launch to Application</u> is enabled the application is started and the file name passed on the command line.

Add

The *Add* Function is used to add new documents to a FOLDER.

Add Document

Select the document to add by typing its file name into the <u>edit box</u> or <u>click</u> on it in the list box.

Add Document to Folder

Detailed information about the Document and File are maintained in the data base.   Some of this information is automatically generated and is not user modifiable.   Other information that can be entered by the user is prompted with default information.   You can accept the default information or enter new by selecting the field and typing any new information required.

Extract to File Name

The name of the file is proposed in the *Extract to File Name* <u>edit box</u>.   You can accept the file name or enter any other valid file name.

CFS will not over write an existing file. If a file with the same name already exists you will be prompted to reenter the name.

Windows Word DOC

If CFS detects that a MS-WORD DOC format file is being <u>Added</u>, information is taken from the Summary to fill in the data base index informat.

```
MS-WORD Summary  CFS Index
      Title                    To
      Subject                         Subject
      Author             From
```
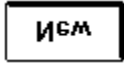
TIFF

Release Notes

The product *Release Notes* can be viewed in the Help system.

New

From the <u>About</u> dialog click on the *New* button.

External Volume

The *External Volume* option allows the document to be stored on disks not currently installed in the system.   When the Document is <u>add</u> only the data base is updated. The Document is not imported.

When the document is <u>Extracted</u> the user is prompted to mount the volume that actually contains the file.

When <u>searching</u> only the data base information is considered, the document text is not available.

WIN.INI

CFS uses profile strings in your WIN.INI file.   CFS sets up and maintains a section like this:

        [CFS]
        Settings=8826
        DefaultFolder=d:\tony\letters\1991.cfs
        DefaultPath=d:\tony\letters

The *Setting* Profile String is controlled by the <u>Settings</u> dialog box and the options found in other dialog boxes.

The *DefaultFolder* tells CFS where to find the default Document Folder

The *DefaultPath* tells CFS the default directory to locate document files for the <u>Add</u> and <u>Extract</u> functions.

View

The *View* functions display the selected document.   The text of the document is displayed.

If a list of documents is selected through the <u>Search</u> function the advance buttons can be used to move through the list.

[<<] Move to the previous document in the list.

[>>] Move to the next document in the list.

ICON

CFS contains several ICONs that can be used to graphically display the contexts of a Folder.

Delete if NOT Modified

This feature is not operational.

Edit Box
The *Edit Box* displays text and lets the user mofify it.

List Box

The *List Box* displays a list of text.   The text may be a list of file names or document text.
Scroll bars are provided if the list is larger than can be displayed in the list box.
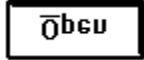
Scroll Bar
Scroll Bars allow the user to move through the text in a <u>list box</u>.

Push Button

Push Buttons let the user choose an action.

Open

Check Box

Check Boxes allow the user to make a slection to configure the action of the program.

☒ Date

☐ File Size

☒ Filename

Radio Button
Radio Buttons work in groups to select one of a group of options.

Ok Button

The *Ok Button* is a <u>Push Button</u> control used to accepts the options of function selected, performs the function and closes the <u>dialog box</u>.

Dialog Box

The Dialog Box is a window that the program open to communicate with the user.

Cancel Button

The *Cancel Button* is <u>Push Button</u> control used to exit a <u>Dialog Box</u> with out performing the function or saving the options selected.

Double Click Extract

With the *Double Click Extract* function selected when you <u>Double Click</u> on a document in the Open Folder View the document is extracted to a file.   See the Extract function.

Double Click View

With the *Double Click Extract* function selected when you <u>Double Click</u> on a document in the Open Folder View the document is viewed.

Double Click
Double click by pressing the Mouse Button twice quickly.

Click

Click by pressing the Mouse Button once.