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## **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 DOC file (.DOC)  
TIFF 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 its ICON in to the Windows MAIN program group. It also set up the configuration information in the Profile Strings in your WIN.INI file.

You can also install CFS yourself with out the INSTALL program.

## Using the INSTALL Program

To run the INSTALL program select the Run 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 WIN.INI file. The CFS ICON 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 New Folder 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 Open Folder command. Use the Add command to add documents to the FOLDER. Use the Extract 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 WIN.INI 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 New 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 View™**

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

The display options section of the Settings command allow the user to configure the information in the Open Folder View™. The Open Folder View™ 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 View™ 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 Settings command, they will be the currently displayed fields.

## **Settings**

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

The Setting dialog box controls the following options:

Document ID

File Name

File Size

Date

To

From

Subject

Delete Added Document

Search Index

Search Document Text

Match Upper/Lower Case

Launch to Application

Delete if NOT modified

Double Click Extract

Double Click View



**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 [Open Folder View](#).

### **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 file. 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 WIN.INI 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 suits 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 [New](#) 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.

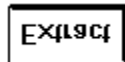
Documents found to match the search string are shown in a list box. Use the scroll bars to look through the list. Select a document by clicking on it. Use the Extract button to extract a copy of the document to a file on the disk.



The Find button starts the search.



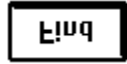
The View button allow you to view the selected document.



The Extract button exports the document to you disk.



## Find



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

**Extract**

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

If Launch to Application 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 edit box or click 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* edit box. 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 Added, information is taken from the Summary to fill in the data base index informat.

MS-WORD Summary CFS Index

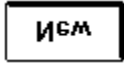
Title	<u>To</u>	
Subject		<u>Subject</u>
Author	<u>From</u>	

**TIFF**



## Release Notes

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



From the About 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 add only the data base is updated. The Document is not imported.

When the document is Extracted the user is prompted to mount the volume that actually contains the file.

When searching 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 Settings 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 Add and Extract 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 Search 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 modify 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.



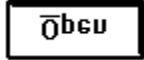
## Scroll Bar

*Scroll Bars* allow the user to move through the text in a list box.



## Push Button

*Push Buttons* let the user choose an action.



## Check Box

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

Date

File Size

File Name

## **Radio Button**

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

**Ok Button**

The *Ok Button* is a Push Button control used to accept the options of function selected, performs the function and closes the dialog box.

## **Dialog Box**

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

## **Cancel Button**

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

## **Double Click Extract**

With the *Double Click Extract* function selected when you Double Click 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 Double Click 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.