

documill

User's Guide

Sarasoft

First Edition-~~documill~~ User's Guide

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Sarasoft
2796 Harbor Blvd., Suite #303
Costa Mesa, CA 92626
fax: (714) 435-1084
e-mail: SarasoftA@aol.com

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Preface

Welcome and congratulations on your purchase of documill™—a powerful and versatile document imaging management system from Sarasoft. documill is the choice of consumers and businesses alike because of its price performance and intuitive user interface.

This guide explains how to install and use documill. It includes information about:

- Preparing for installation
- Installing documill
- Creating drawers and folders
- Inputting, processing, and outputting documents

This guide assumes that you are familiar with computer hardware (including fax/modems and scanners) and the Windows operating system. To gain more understanding about these products, read the setup and operation manuals shipped with them before installing and using documill.

About this guide

This guide contains all the information you need to install and use documill. There are 6 chapters:

- Chapter 1: “Introducing documill,” gives an overview of documill, including its features and basic operation.
- Chapter 2, “Installing documill,” explains how to install documill software and set up related hardware devices such as scanners, fax boards, and printers. This chapter also shows you how to set up the main application window.
- Chapter 3, “Creating drawers and folders,” describes documill’s file storage hierarchy and explains how to set up new drawers and folders.
- Chapter 4, “Inputting files,” gives the procedure for sending images and other files to documill by using a scanner, a fax/modem, or the graphic conversion feature.
- Chapter 5, “Managing documill files,” explains how to view, browse, search, and apply pointers to documill files.
- Chapter 6, “Outputting files,” shows you how to send new faxes, resend or forward existing faxes, print a file, and export a file in a standard graphic format.

documill road map

All users should read Chapter 2 before installing documill and then refer to Chapters 4–6 as needed while operating the application.

If you are unfamiliar with documill or document imaging management systems, read Chapter 1.

For help with creating and organizing documill directories, read Chapter 3.

Document conventions

This guide uses the following conventions:

- New terms in text are italicized.
- References to menus, menu items, commands, buttons, and so on are enclosed in “quotationmarks.”
- Computer voice is indicated using the `Courier font`.
- Lists displayed in text are either numbered (1, 2, 3,...) or bulleted (•). Numbered items in a list represent a sequence such as steps in a procedure. Bulleted items in a list are members of a group that have no particular order or priority.
- List items may be subdivided as shown below:
 - Each item is preceded by a dash
 - In a numbered list, each item of the sublist must be completed from top to bottom before proceeding to the next step
 - In an unnumbered list, the sublist items have no order or priority
- Notes, cautions, and warnings appear as nested paragraphs within the main body of text. These paragraphs contain important information that relates directly to the main topic of discussion. Cautions contain information that must be followed to avoid equipment or program damage. Warnings contain information that must be followed to avoid personal injury.

Introducing documill

documill is a versatile document imaging management system that combines sophisticated send-and-receive fax, scanning, file format conversion, document management, and printing functions in a single application. With documill, you have complete control of your documents and images at every step of the process.

How documill works

documill consists of three main processes linked seamlessly together:

- Importing documents using a scanner, fax, or graphics program
- Processing documents, including filing, viewing, browsing, searching, etc.
- Exporting documents by printing, faxing, or converting to one of 11 different graphic file formats.

Pages can be imported to documill by fax, scanner, or graphics software program. Fax pages and graphic software files are converted to TIFF (Tag Image File Format) and immediately filed in a folder that you designate. Scanned pages (also TIFFs) go to a queue where they await commitment to a folder.

All documill folders are contained in drawers.

Once the pages have been filed, they may be viewed, browsed, searched, annotated, bookmarked, grouped with other pages and so on.

Finally, the pages may be output from documill to a fax, printer, or graphics application in any one of 11 file formats (see "Features" in this chapter.)

Pages from any file, folder, or drawer can be grouped together in any order to create a document for output.

documill features

documill has the following wide range of indispensable features:

- Complete document imaging system solution. documill is a complete solution, providing many options for scanning, filing, searching, browsing, faxing, printing, and viewing documents.
- Device independence. documill works with virtually any printer; monitor; Level 1, 2, or 2.0 fax card; and TWAIN scanner.
- Advanced fax operation. documill can send and receive faxes in the background, fax from any Windows® application that supports a Print function, and schedule out-going faxes. documill also provides a built-in fax phone book.
- Intuitive interface. documill is extremely quick and easy to use. At every level, you have a view of the document you are working on and you can jump from level to level with ease.
- Enhanced document management capabilities. With documill, you can view, search, annotate, and mark pages with bookmarks you can name. Up to 10 bookmarks may be assigned per folder. With the viewer window, you can view any number of folders at the same time.

- Compatibility with 11 graphic file formats. For both import and export functions, documill supports the following graphic file formats:
 - PCX. Supported color formats include monochrome, 16 color, 256 color, and 24 bit.
 - TIFF. Supports TIFF Specification 5.0 files. Supported Compression types include no compression, LZW, packbits, Modified Huffman encoding, CCITT Group 3 1D, CCITT Group 3 2D, and CCITT Group 4. Supported color formats include monochrome, 256 color, grayscale, and 24 bit.
 - BMP, DIB. Supports 1-, 4-, 8-, 24-bit images in Windows or OS/2 format files. Currently Run Length encoded files are not supported.
 - Targa. Supports Targa version 1 & 2 files including 16, 24, and 32 color and grayscale images. Both compressed and uncompressed image are supported.
 - EPSF. Encapsulated postscript files with and without display images are supported. If the EPS file doesn't contain a TIFF or Windows Metafile display image then the filename of the EPS image will be displayed.
 - WMF. Only metafiles which conform to the Aldus Placeable Metafile Format are supported. Most applications which export or import metafiles support this format.
 - IMG. GEM Image format. Monochrome only.
 - WPG. Wordperfect Graphics Format. Supports both raster and vector files.
 - JPG. Supports JFIF compliant files.
 - DCX. Intel-DCA Multiple image file format. Supports Monochrome and color files.

Minimum System requirements

The following are minimum system requirements for documill:

- CPU: 486/33 MHz
- System memory: 8 MB
- Available hard disk space: 5 MB
- Display adapter: VGA (640 x 480)
- Operating system: Windows v3.1 or Windows 95
- Printer: any Windows-supported printer
- Scanner: any TWAIN scanner
- Fax card: any Level 1, 2, or 2.0 fax card

documill user interface

This section gives a quick reference to specific documill menus, Toolbar, Status bar, and custom documill user interface conventions.

NOTE: documill conforms to the Microsoft Windows user interface in terms of the general operation of menus, dialogs, and windows.

Custom user conventions

In addition to following the standard Windows user interface, the documill application uses these conventions:

- Drawers. documill uses drawers as well as folders and files in its hierarchical filing system. As explained earlier in this chapter, drawers are receptacles for

- folders. Only one hierarchy of folders is allowed.
- User-friendly dialogs. The file, folder, and drawer dialogs have the following attributes:
 - All major functions for each icon are linked to a single dialog using dialog tabs. This means you can switch from Delete Folder, for example, to Modify Folder without leaving the Folder dialog.
 - When working with a drawer or folder, you always see current information about the drawer or folder displayed in the dialog. In the case of folders, you also see a “tree” diagram of drawers and folders.
 - Once opened, each dialog remains open so you can work with multiple items.
 - Clear and simple error messages. documill uses either a message dialog or “red flags” to indicate errors. For most errors (for example, if you enter an illegal date), the field simply becomes highlighted in red. When an explanation is necessary (for example, you enter a name that is not unique), the field becomes highlighted in red and a message appears, clearly defining the error and what you must do to correct it.

Toolbar and Status bar

The Toolbar and Status bar (Figure 1-2) contains documill command icons and a status display, respectively. The icons in the Toolbar make major documill controls and functions accessible.

documill Center

The documill Center (Figure 1-3) combines documill input, output, and management features in a single dialog box. To open the documill Center, click the “documill” button in the Speed Palette.

Installing documill

This chapter explains how to install and set up the documill application and to set up peripheral equipment such as fax/modems, printers, and scanners to work with documill..

NOTE: This guide does not include any hardware installation procedures. To install computer or peripheral hardware or system software, refer to the manufacturer's documentation.

After documill is installed, the application and equipment setups explained in this chapter may be performed or modified at any time.

Preparing for installation

Before beginning the installation in this chapter, set up your computer system and connect any peripheral devices that are to be used with documill. Don't be concerned if some peripheral equipment is unavailable at the time of installation. This equipment can be set up for use with documill at a later time. Simply use the instructions in this chapter after connecting the equipment to your system.

For the compatibility requirements of peripheral equipment, refer to "System requirements" in Chapter 1.

Installing documill software

documill software is shipped on two 3.5-inch diskettes. To install the application:

1. Insert diskette #1 in your computer's floppy disk.
2. Open the Windows Explorer to either select an existing program group or to create a new program group.
3. Click on the diskette icon to launch the installer. A dialog box appears.
4. In the "Name" field, type the name of the program in the text box and click "OK".
5. In the "Path" field, type the path to the program and click "OK".
6. Follow the on-screen prompts. When prompted to do so, insert diskette #2.
7. When the installation is complete, a dialog box informs you that the installation was successful.
8. Click "OK" to return to the Installation menu.
9. Click the "Exit" radio button and then click "OK."

The documill application is now installed and ready to use.

Configuring documill

After installing documill, you need to launch the application and set some defaults. You can configure the documill Main Window, Fax Log, and Document Viewer.

Launching documill

To launch the documill application, simply double-click the documill icon. The documill Main Window appears (Figure 2-4).

Configuring the Main Window

To configure the Main Window:

1. From the documill Main Window, choose "Application" from the "Setup" menu. The Main Window Setup menu appears (Figure 2-5).
2. To display the Toolbar or Status bar in the documill Main Window (default condition), leave the appropriate checkbox checked. To remove either of these displays, uncheck the appropriate checkbox.
3. Configure the Toolbar as follows:
 - Assign the default Toolbar location by clicking the "Left Aligned" or "Right Aligned" radio button.
 - Select whether to display icons and text or just icons by clicking the appropriate Toolbar Appearance radio button.
4. To select a background color for the Main Window, click the "Window Color" button and select a color from the palette. Then, click "OK."

Setting up the Fax Log

The Fax Log maintains a record of all faxes received, sent, currently being processed, pending, and failed. This procedure enables you to arrange and resize Fax Log entry columns.

2. Use the mouse cursor to drag columns to a new location or to resize columns. To complete this setup, position the mouse cursor over the column border and drag to make the column larger or smaller.
- To set up the Fax Log:
1. Choose "Fax Log" from the "Setup" menu. The Fax Log Setup dialog box appears (Figure 2-6).
 3. Click "OK" to save new defaults and exit.

Setting up the Document Viewer

The Document Viewer is a window that allows you to view documents you select. The Viewer Setup dialog box allows you to turn the viewer function on or off and to select a default zoom value.

To set up the Document Viewer:

1. Turn the viewer function on by checking the "Auto view" checkbox and turn it off by unchecking the checkbox.
3. Choose a default zoom value for the viewer by clicking the appropriate radio button.
4. Click "OK" to save the setup and return to the Main Window.

Configuring peripheral devices

Use the "Setup" menu to configure a fax/modem, printer, or scanner for documill operation. This section gives specific instructions for each type of peripheral device.

Fax/modem

To set up a Level 1, 2, or 2.0 fax/modem:

1. Install the fax/modem as explained in the manufacturer's documentation.
2. Start your computer system and launch documill by double-clicking the documill icon. The documill Main Window appears (see Figure 2-4).
3. Choose "Fax" from the "Setup" menu. The Fax Setup dialog box appears (Figure 2-8).
4. Configure the Program page of the Fax Setup dialog box:
 - Enter the number of retries. This is the number of times documill will attempt to complete a fax call.
 - Enter the retry interval. This is the number of minutes documill will wait between retries.
 - Enter the dial prefix. This is any number that must be dialed before the fax area code and phone number. (For example, some office phone system require you to dial "9" to reach an outside line.)
 - Enter the fax ID number.
 - Enter the fax banner. This is a line of text that will appear at the top of each page of your fax.
 - If you want to use the Arrange Fax Pages dialog box (see Chapter 4), click the checkbox. In default configuration, the Arrange Fax Pages dialog box appears after creating a new fax so you can rearrange and delete fax pages prior to sending the fax.
 - Click the "User" tab to bring forward the User page of the Fax Setup dialog box (Figure 2-9).
5. Configure the User page of the Fax Setup dialog box by entering your name, company name, and voice and fax telephone numbers. When you have finished, click the "Modem" tab to bring the Modem page forward (Figure 2-10).
6. Select one or more modems for documill from the list of available modems and click the "AutoConfig Modem" icon.
7. Click "OK" to save the configuration and exit the Fax Setup dialog box.

Printer

To set up a printer:

1. Install the printer as explained in the manufacturer's documentation.
2. Start your computer system and launch documill by double-clicking the documill icon. The documill Main Window appears (see Figure 2-5).
3. Choose "Printer" from the "Setup" menu. A standard Windows Printer Setup dialog appears.
4. Configure the printer in this dialog as desired.
5. When you have finished, click "OK" to save the configuration and return to the Main Window.

Scanner

To set up any TWAIN scanner:

1. Install the scanner as explained in the manufacturer's documentation.
2. Start your computer system and launch documill by double-clicking the documill icon. The documill Main Window appears (see Figure 2-6).
3. Choose "Scanner" from the "Setup" dialog. The Scanner Setup dialog appears (Figure 2-11).
4. In the Resolution area, click the appropriate radio button to configure a default resolution or use the scanner's resolution.
5. In the Color area, click the appropriate radio button to choose either "Black and White" or "256 Colors/Gray Scale."
6. In the Options area, do the following:
 - Click the "Use ADF" checkbox to use the scanner's automatic document feeder. If you check this box, you must enter a number of pages in the text box to the right.
 - Click the "Show Scanner Dialog" to display the scanner's dialog before every scan. This gives you more control over the scans to make. If you uncheck this option, scanning will operate in the background with default settings.
7. If you have two or more scanners, click the "Select TWAIN Scanner" button to open a list dialog box of all TWAIN scanners. Select a scanner to use with documill and click "OK" to return to the Setup Scanner dialog box.
8. In the Scanner Setup dialog box, click "OK" to save the configuration and return to the Main Window.

Chapter 3 Setting Up

Drawers and Folders

Before you can begin using documill, you must set up at least one drawer and one folder as a storage location for document pages. As the name implies, a drawer is a receptacle for folders and folders hold document pages. As this chapter will show, you can utilize drawers and folders to organize your scans, faxes, and other on-line documents in a variety of ways.

This chapter explains how to:

- Create drawers and folders
- Use drawers and folders
- Rename and modify drawers and folders
- Delete folders

Using drawers and folders

Let's suppose you purchased documill to handle your personal and business documents. This suggests the need for at least two drawers: Personal and Business. But you probably also have several categories of personal and business documents to save. These categories can be represented by simply creating other drawers or folders.

For example, let's say you create three personal drawers (Correspondence, Family Photos, and Financial) and one business drawer (Business). Then, you create folders within each drawer as follows:

- Correspondence: Incoming and Outgoing
- Family Photos: A folder for each family member plus folders for vacation trips, family activities, other relatives, and so on
- Financial: Current bills, Utilities, Telephone, Mortgage, Tax Forms, and so on
- Business: A folder for each project, Memos, Reports, Expenses, and so on

This represents a good start toward organizing your on-line documents. And additional drawers and folders may be added easily at any time. Some other typical drawers to add might include:

- School
- Hobbies
- Legal
- Medical
- Investments
- Travel

NOTE: You can create an unlimited number of drawers and folders, but you should create drawers carefully, since they cannot be deleted (only renamed).

Creating drawers and folders

This section explains how to create new drawers and folders.

Creating a new drawer

To create a new drawer:

1. Choose "NewDrawer" from the "File" menu. The Create Drawer dialog box appears (Figure 3-1).
2. Enter a unique name for the new drawer in the "Name" field. (This is the only required entry.)
NOTE: The name you enter must be unique. If it is not, a warning message appears and you must enter another name to continue.
3. If desired, enter information in the "Description," "Source," and "Remarks" fields. (Entries in these fields may be useful as search criteria but they are not required.)
4. To automatically create a default folder within the new drawer, click the "Create default" checkbox.
5. Click "OK"
6. Repeat Steps 2-5 to create other drawers.
7. When you have finished creating drawers, click "Cancel" to close the Drawer dialog box.

Creating a new folder

After creating one or more drawers, you are ready to create the folders that go inside the drawer(s). To do this:

1. Choose "NewFolder" from the "File" menu. The Create Folder dialog box appears (Figure 3-2).
2. Enter a unique name for the new folder in the "Name" field. (This is the only required entry.)
NOTE: The name you enter must be unique. If it is not, a warning message appears and you must enter another name to continue.
3. Associate the new folder with a drawer by choosing a drawer from the "Drawer" pull-down menu.
4. If desired, enter information in the "Description," "Source," "Date," "Time," and "Remarks" fields. (Entries in these fields may be useful as search criteria but they are not required.)
5. Click "OK"
6. Repeat Steps 2–5 to create other folders.
7. When you have finished creating folders, click "Cancel" to close the Folder dialog box.

Once drawers and folders are in place, you can begin to import documents as explained in Chapter 4.

Modifying drawers and folders

You can use the "Edit" menu to modify drawers and folders, as explained in this section.

Modifying drawers

Use the following procedure to rename a drawer or change any information in the descriptive fields associated with the drawer.

1. Choose "Drawers" from the "Edit" menu. The Modify Drawer dialog box appears (see Figure 3-1).
2. Select the drawer you would like to modify from the list on the right side of the dialog box. After you select a drawer, current information about the drawer appears on the left side of the dialog box.
3. Edit any of the fields in the dialog box. To rename the drawer, for example, edit the "Name" field, click "Save" to save all changes.
4. To modify other drawers, repeat Steps 2–4.
5. When you have finished editing folders, Click "Done" to close the Modify Drawer dialog box.

Modifying folders

You can modify folders in the same way you modify drawers.

1. Choose "Folders" from the "Edit" menu. The Modify Folder dialog box appears (see Figure 3-2).
2. Click the "Modify" tab at the top of the dialog box
3. Select the folder you would like to modify from the list on the right side of the dialog box. After you select a folder, information about the folder appears on the left side of the dialog box.

4. Edit any of the fields in the dialog box. To rename the folder, for example, edit the "Name" field, Click "Save" to save all changes.
5. To modify other folders, repeat Steps 2–4.
6. When you have finished editing folders, Click "Done" close the Modify Folders dialog box.

Deleting Folders

You can delete folders as easily as you create them.

NOTE: When a folder is deleted, all files contained in the folder that do not have aliases elsewhere are also deleted. Files with aliases remain until all aliases have been deleted. For more information about working with files, see Chapter 5.

To delete a folder:

1. Choose "Folder" from the "Edit" menu. The Delete Folder dialog box appears (see Figure 3-2).
2. Click the "Delete" tab at the top of the dialog box.
3. Select a folder to be deleted from the right side of the dialog box. When a folder is selected, information about the folder appears on the left side of the dialog box.
4. Click the "Delete" button to delete the folder.
5. To delete other folders, repeat Steps 2–4.
5. When you have finished deleting folders, click "Done" to close the Folder dialog box.

Inputting Documents

Once you have installed documill, set up peripheral equipment, and established and organized drawers and folders for your needs, you are ready to start inputting and storing documents. As mentioned in Chapter 1, you can input documents in three ways:

- By scanning
- By receiving a fax
- By importing an image from a graphics program

This chapter describes each of these procedures in detail.

Scanning documents

To scan a document:

1. Click the "Scan" button. The Scan dialog box appears (Figure 4-1).
NOTE: As an alternative, choose "Scan" from the "File" menu.
2. Choose a queue to receive the scan by clicking the desired queue icon in the left most list box of the dialog. The files currently found in the selected queue (if any) appear in the "QueueFiles" list box.
NOTE: To view any file in the queue, click the "Autoview" button and select the file from the Queue Files list.
3. To change the scanner setup, click the "Setup" button. For more information about setting up the scanner, refer to Chapter 2.
NOTE: Scanner setup allows you to select or modify defaults concerning resolution, color, manual/automatic feed, etc..
4. Click the "Scan" button to perform the scan. If you selected "ShowScanner Dialog" when you set up the scanner, the scanner manufacturer's dialog box appears. This dialog box may give you additional control over the scanning function.
NOTE: If you selected the automatic document feeder (ADF) option when you set up the scanner, the number of pages you specified will be scanned.
5. Repeat Steps 2–4 to perform other scans.
6. When you have finished scanning, click the "Done" button.
NOTE: The scans will remain in the queue you chose in Step 2 until you move them into a folder. This procedure is explained in the Chapter 5.

Receiving faxes

documill allows you to receive faxes automatically as long as the "AutoReceive" option in the "Fax" menu is checked (default condition). Whenever a fax comes in, it is saved in a special documill data folder and an entry appears in the Fax Log.

To view and process faxes you receive, go to Chapter 5.

Importing graphic files

To import a graphic file to documill:

1. Choose "Import" from the "File" menu. The Import Graphic File dialog box appears (Figure 4-2).
2. Choose the desired file or files using the Directories and Files list boxes. To view the file, click the "AutoView" button. (Click the checkbox to scale the image in the viewer.)
3. Choose a destination folder from the list box on the far right.
4. Click the "Import" button.
5. Repeat Steps 2–4 to import other files.

Managing Documents

This chapter explains how to manage the documents and graphic files input into documill. Using documill management functions, you can:

- View queues, folders, and faxes
- Rescan a document page
- Mark document pages by annotating document page or assigning bookmarks
- Find a particular file
- Browse drawers and folders
- Editing files (copying, moving, and deleting)
- Editing folders (modifying and deleting)
- Modifying drawers
- Deleting a fax

Other documill management functions are concerned with document export. These functions are described in Chapter 6.

Viewing documents

documill allows you to view the contents of any queue or a folder. Queues are temporary storage receptacles for scans; folders organize documill files within a drawer. For more information about queues, folders, and drawers, go to Chapter 1.

Viewing the contents of a queue

The documill Center provides the easiest way to view the contents of a queue. To do so:

1. Click the “documillCenter” button in the Toolbar. The documill Center appears (Figure 5-1).
2. Make sure the “Autoview” checkbox is checked.
3. Click the “Select” menu. A drop-down list appears. Drag through the list to choose the desired queue. The chosen queue will be checked in the list. The contents of the chosen queue appears in the list box above the “Select” button.
NOTE: The Select menu also allows you to select multiple files in a queue (all files, odd files, even files, and so on.)
4. Highlight an item to view. A representation of the item appears in the viewer to the right of the text box.
5. To file the selected item in a folder:
 - Click the “File” button. The File Images from Queue dialog box appears (Figure 5-2).

As shown in the figure, this viewer enables you to:

- Go from page to page through a multiple page document
- Go to a specific page in the document
- Zoom in on a page
- Rotate the page in 90° increments
- Annotate a document page
- Place up to ten bookmarks per folder

NOTE: Detailed instructions for using notes and bookmarks can be found later in this chapter.

Viewing a fax

To view a fax:

1. Choose “View” from the “Fax” menu. The Fax Log appears (Figure 5-6).
2. If necessary, tab to the desired page in the Fax Log and double-click the desired fax entry. The Fax Viewer appears (Figure 5-7).
NOTE: The Fax Viewer is similar to the Folder Viewer. You can scroll from page to page, go to a particular page, zoom in on a page, and rotate the page in 90° increments. The Fax Viewer does not allow you to make annotations or place bookmarks.
3. When you are finished viewing the fax, click “Done” to return to the Fax Log.
4. Repeat Steps 2–3 to view other faxes.
5. When you have viewed all faxes, click “OK” to exit the Fax Log.

Rescanning a document page

If, after viewing a scanned document, you decide that one or more pages were not scanned properly, you can rescan them as follows:

1. Click the “Scan” button in the documill Center or choose “Scan” from the “File” menu. The Scan dialog box appears (Figure 5-8).
2. Double-click the appropriate queue and highlight the page to be rescanned from the list.
3. Insert the page in the scanner.
4. Click the “Rescan” button in the Scan dialog box. The new scans replace the old automatically.

Marking documents

documill provides two ways for you to mark scanned documents and image files: by annotation and by bookmark.

Annotating documents

You can annotate documents by “affixing” electronic “stickynotes” directly to the document page. These notes can hold useful comments, reminders, or search criteria. To annotate a document:

1. Open the Folder Viewer (see Figure 5-6).
2. Open the page you wish to annotate.
3. Click the annotate button (the “paperclip” icon at the bottom right corner of the Viewer).
4. Click anywhere inside the note to activate the text cursor. Type a message of any length.

5. Repeat Steps 2–5 to create additional annotations.
6. Click “OK” to close the Folder Viewer.

Assigning bookmarks

You can also mark document pages with bookmarks. Each folder has ten bookmarks which you can name and assign.

NOTE: In default condition, all ten bookmarks are assigned to the first page saved to the folder.

To assign a bookmark to a different page:

1. Open the Folder Viewer (see Figure 5-6).
2. Open the page you wish to mark.
3. Highlight any “Bookmark” at the bottom of the Folder Viewer.
4. Click the highlighted bookmark with the right mouse button. A small dialog appears, allowing you to name the bookmark.
5. Type a name for the bookmark and click “OK” to return to the Folder Viewer.
6. Repeat Steps 2–5 to name and assign other bookmarks.
7. Click “OK” to close the Folder Viewer.

Searching documill

documill allows you to search for documents in two ways: by “finding” specific criteria or by “browsing” all the documents in a particular folder.

Using the Find command

Use the Find command to search for a particular folder or an annotation that you placed on a document page. To use the Find command:

1. Click the “Search” button in the documill Toolbar or choose “Find” from the “Search” menu. The Find dialog box appears (Figure 5-9).
2. To search for an annotation, enter the appropriate criteria at the top of the dialog box. To search for a particular folder, enter the appropriate information in the Drawer Name, Folder Name, Description, Source, or Remarks fields.
3. Click the “Search” button to begin the search. Files and folders that meet the criteria you entered appear in the “File” and “Folder” text boxes.
4. Repeat Steps 2–3 to search for other files and folders.
5. When you have finished searching for documents, click “Done.”

Using the Browse command

Use the Browse command to look at the content of a particular folder. To browse a folder:

1. Click the “Browse” button in the documill Toolbar or choose “Browse” from the “Search” menu. The Browse dialog box appears (Figure 5-10).

2. Choose a folder from the list. A list of files appears in the "File" list box.

Editing files

You can edit files by copying, moving, or deleting them.

Copying files

The copy function creates an alias of any document page so it can be filed in two or more folders at the same time. Because they are "aliases," document copies do not occupy any additional disk space. You can create as many copies of a document as desired using the following procedure:

1. Choose "File" from the "Edit" menu. The Edit File dialog box appears (Figure 5-11).
2. Choose the file to be copied from the "Source" list box. If the "View" checkbox is checked, the document appears in the small viewer.
3. Highlight a destination folder in the far right list box.
4. Click "Copy."
5. Repeat Steps 2–4 to copy other files.
6. Click "Done" to close the Edit File dialog box.

Moving documents

Moving documents is similar to copying except that the Move command removes the source file pointer. The destination file pointer becomes the new source.

To move a document:

1. Choose "File" from the "Edit" menu. The Edit File dialog box appears (see Figure 5-11).
2. Click the "Move" tab. The Move File dialog box appears (Figure 5-12).
3. Choose the file to be moved from the "Source" list box. If the "View" checkbox is checked, the document appears in the small viewer.
4. Highlight a destination folder in the far right list box.
5. Click "Move."
6. Repeat Steps 3–5 to move other files.
7. Click "Done" to close the Edit File dialog box.

Deleting files

You can delete files as easily as you copy or move them.

NOTE: If the file you are deleting has an alias, the alias must also be deleted. If you only delete one copy of a file, other copies can still be accessed.

To delete a file:

1. Choose "File" from the "Edit" menu. The Edit File dialog box appears (see Figure 5-12).
2. Click the "Delete" tab. The Delete File dialog box appears (Figure 5-13).
3. Choose the file to be deleted from the "Source" list box. If the "View" checkbox is checked, the document appears in the small viewer.
4. Click "Delete."

5. Repeat Steps 3–4 to move other files.
6. Click “Done” to close the Edit File dialog box.

Edit folders

You can edit folders by deleting or modifying them.

Deleting folders

When you delete a folder, any files in the folder are also deleted.

NOTE: If the files have aliases in other folders, those files will remain intact.

To delete a folder:

1. Choose “Folder” from the “Edit” menu. The Edit Folder dialog box appears (Figure 5-14).
2. Choose the folder to be deleted from the folder list. The folder name and description appears in the fields on the left.
3. Click the “Delete” button.
4. Repeat Steps 2–3 to delete other folders.
5. Click “Done” to edit the Edit Folder dialog box.

Modifying folders

When you modify a folder, you change the associated drawer; the folder name; or the folder description, source, date, time or remarks. To do this:

1. Choose “Folder” from the “Edit” menu. The Edit Folder dialog box appears (see Figure 5-15).

2. Click the "Modify" tab.
3. Click the folder you want to modify in the list box. The folder name and description appears in the fields to the left.
4. Enter new information in any of the fields.
5. Click the "Modify" button to save the changes you made in the dialog.
6. Repeat Steps 3–5 to modify other folders.
7. Click "Done" to exit the Edit Folder dialog box.

Modifying drawers

Once created (see Chapter 3), drawers cannot be deleted. They can, however, be modified using this procedure:

1. Choose "Drawer" from the "Edit" menu. The Modify Drawer dialog box appears (Figure 5-16).
2. Select a drawer from the list box. The current drawer name and description appears in the fields on the left.
3. Enter new information in any of the fields.
4. Click the "Modify" button.
5. Repeat Steps 2–4 to modify other drawers.
6. Click "Done" to exit the Modify Drawer dialog box.

Outputting Documents

This chapter explains how to output documents from documill by faxing them, printing them, or exporting them as graphic files. The chapter also contains instructions for developing and maintaining a fax phone book.

Faxing documents

documill has powerful features for sending faxes. Using documill, you can create a fax phone book; collect and arrange pages from any queue, folder, or file; send and resend the fax; and forward, print, or delete received faxes.

Using the Fax Phone Book

Use the “EditPhone Book” command to enter a new fax number, to edit a fax number, or to search or browse the fax directory.

1. Choose “EditPhone Book” from the “Fax” menu. The Phone Book dialog box appears (Figure 6-1).

2. To make a new entry:
 - Click the "plus" button.
 - Fill out each field in the dialog box.
 - Click the "next" or "previous" button to save the entry.
 - Repeat this step to make more entries.
3. To browse the phone book, use the arrow buttons.
4. To edit a phone book page, go to the page and enter the new information in the appropriate field. Then, click the "next" or "previous" button to save the changes you make.
5. When you are finished working with the Phone Book dialog box, click "Cancel" to exit.

Printing the Phone Book

To print the Phone Book:

1. Choose "PrintPhone Book" from the "Fax" menu. The Print Phone Book dialog box appears (Figure 6-2).
2. Select "Short" or "Long" list by clicking the appropriate radio button. The short list prints only names and fax numbers. The long list prints all information recorded in the Phone Book for each entry.
3. Click the "PickFont" button. A list of fonts and sizes appears. Choose any font and font size desired and then click "OK" to return to the Print Phone Book dialog box.
4. Set desired margins for the print out by typing a value (in Pixels) in each of the four boxes. These boxes define the top, bottom, right, and left margins.
5. Click the "Print" button to print the Phone Book.

Sending a fax

documill allows you to send faxes composed of document pages from any combination of queues and folders. You can send a fax to a single recipient or to a list of recipients.

To send a fax:

1. Click the "Fax" button in the documill Toolbar or choose "Send" from the "Fax" menu. (You can also click the "Fax" button in the documill Center.) The Collect Fax Pages dialog box appears (Figure 6-3). This dialog allows you to collect the pages for your fax.

2. Choose pages from any queue, folder, or file.
 - Use the tabs at the top of the dialog box to switch between queues, folders, and files.
 - Use the “Select” button to select multiple files in any queue or folder.
 - Click the “Add” button to add the selected page(s) to the fax.
3. After all selections have been made, click the “Next” button to go to the Arrange Fax Pages dialog box (Figure 6-4).
4. Drag the entries in the Pages list to arrange them in any order. Click the “view” button (sunglasses) to view the selected page. Click the “Delete” button to delete a selected page from the list.
5. When you have finished arranging the pages of the fax, click the “Next” button to go to the Send Fax dialog box (Figure 6-5).

NOTE: To return to the Collect Fax dialog box, click the “Back” button.

6. Complete the dialog box fields as follows:
 - Enter a fax number (single-recipient fax) or choose recipients from the Fax Book list at the bottom of the dialog box (single- or multiple-recipient fax).
 - Enter a time in the “FaxTime” field to schedule a time within the next 24 hours to send the fax. The format of this entry should be “930” or “2145” If you do not enter a time, the fax will go out immediately.
 - If desired, enter a subject for your fax in the “FaxSubject” field.
 - To send a slower, higher-quality, check the “HiRes” checkbox.
 - To create a cover page for the fax, check the “CoverPage” checkbox.
7. When you have filled out the dialog box, click the “Fax” button to send the fax.

After completing these steps, the fax will appear as an entry in the Fax Log. You will see it in the “Sending” page if it is being sent immediately or in the “Pending” page if it is to be sent out at a later time. To open the Fax Log, choose “View” from the “Fax” menu.

Resending a fax

The Resending Fax command assumes that you want to send an existing fax (properly collected and arranged) to a new recipient. To do this:

1. Choose “Resend” from the “Fax” menu. The Send Fax dialog box appears (see Figure 6-6).

2. Select the fax you want to resend.
3. Complete the dialog box fields as explained in Step 6 of the "Sending a fax" procedure.
4. Click the "Fax" button to send the fax.

Forwarding a fax

When you forward a fax, you are sending a fax you received to another recipient. To do this:

1. Choose "Forward" from the "Fax" menu. The Send Fax dialog box appears (see Figure 6-6).
2. Select the fax you want to forward.
3. Complete the dialog box fields as explained in Step 6 of the "Sending a fax" procedure.
4. Click the "Fax" button to send the fax.

Printing documents

With documill, you can print scanned documents, graphic files, or faxes.

Printing scans and graphic files

To print images imported to documill via the scanner or a graphics application:

1. Click the "Print" button from the documill Toolbar or choose "Print" from the "File" menu. (If you are using the documill Center, you can also click the "Print" button.) The Print dialog box appears (Figure 6-7).
2. Select the file(s) you want to print from any queue or folder. Use the tabs at the top of the dialog box to toggle between queues and folders.
NOTE: Use the "Select" menu to make multiple file selections within a queue or folder.
3. To view a selected file, check the "View" checkbox. Once a file is in the viewer, you can use the "Zoom" and "rotation" buttons.
4. Enter the number of copies you wish to print in the bottom right-hand corner of the dialog box.
NOTE: To change the printer setup before printing, click the "Setup" button. Printer setup is explained in Chapter 2.
5. Click "Print."

Printing faxes

To print a received fax:

1. Choose "Print" from the "Fax" menu. The Print Fax dialog box appears with a list of fax pages from the Received Fax Log (Figure 6-8).

2. Select the pages you want to print. Use the Select menu to make multiple selections.
3. To view a selected fax page, click the "view" button (sunglasses). Once a page is in the viewer, you can use the "Zoom" and "rotation" buttons.
4. Enter the number of copies you wish to print in the bottom right-hand corner of the dialog box.
NOTE: To change the printer setup before printing, click the "Setup" button. Printer setup is explained in Chapter 2.
5. Click "Print."

Exporting graphic files

documill allows to export documill scanned images and graphic files in any of the following formats: PCX, TIFF, BMP/DIB.

NOTE: documill can be useful as a file format conversion program. If your graphics application does not support a particular file format you require, you may import the file to documill and export it again in the required format. See Chapter 4 for instructions about importing graphic files.

To export a graphic file:

1. Choose "Export" from the "File" menu. The Export dialog appears (Figure 6-9). A list of files in the selected folder appears in the "Files" list box.
2. Choose the source folder from the list box on the left-hand side of the dialog.
3. Select a file from the list. Click the "view" button (sunglasses) to view the file.
4. Choose a format from the menu under the "Files" list box.
5. Choose a destination directory in the far right list box. Use the menu at the bottom of the list box to change volumes.
6. Click the "Export" button.