

# Content Central User Guide

Document Management Software



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# Preface

## 1. Foreword

When we at Ademero set out to design a document management system, we wanted to provide the framework and feature set that *you* the user have requested over the years. We believe Content Central has accomplished just that. We respect your thoughts and opinions and consider all feedback we receive from our customers. Always feel free to drop us a line via phone, Web, or e-mail. Customer satisfaction is our primary goal.

We've attempted to write this documentation in a way that provides concepts and definitions first and foremost before instructions. If for any reason any part of this document is unclear or the product does not perform as indicated or expected, please contact our support center below for a quick response and resolution to the issue you're experiencing. We pride ourselves on customer service; that's why we offer our support to you 24 hours-a-day, 7 days-a-week on any day of the year.

### Ademero Support Channels

Phone (863) 937-0272

Toll-Free (888) 276-2914

E-mail [support@ademero.com](mailto:support@ademero.com) [<mailto:support@ademero.com>]

Web Site <http://www.ademero.com/>

## 2. Content Central Concepts

This section identifies the key concepts behind how this document management system operates. This information will help you throughout the rest of this document.

### 2.1. Documents

A document is represented as a file on the file system. What sets a document apart from other files is its use. documents usually contain text or other data that can be searched for retrieval. Common document formats include PDF [Definition: Portable Document Format], Microsoft® Word®, and Microsoft® Excel®. Some document formats contain content and/or metadata that may be inherited when imported. For a full list of these file types, see [Appendix A, Supported File Types with Existing Content](#).

Document properties, also known as index fields, tags, or metadata, provide a classification system that helps you find documents more quickly and accurately in Content Central.



#### Note

Ademero strongly recommends the use of document properties when capturing information.

When paper images have been captured from a scanner or other input device, Content Central converts them to PDF files. The PDF format conveniently stores images, text, and document properties in one file.

## 2.2. Document Types

Each document is described by a document type, which serves as a template for the document. Unique security permissions, fields for document properties, and more can be defined at the document-type level. Each document inherits these settings when captured.

## 2.3. Catalogs

A catalog contains information about a related set of documents in the system. You can create as many catalogs as needed. Catalogs usually take the form of an existing business department or business process. The information stored in a catalog is as follows:

- Document types
  - User & Group Permissions
  - Fields (metadata)
  - Text-Recognition Zones (Zonal OCR)
  - Barcode-Recognition Zones (Zonal Barcode)
  - Field-Lookup Integration
  - Approval Processes [*Enterprise Edition*]
  - Workflow Rules [*Enterprise Edition*]
  - Message Templates [*Enterprise Edition*]
  - Folder & File Building
  - Capture Forms
  - Retention Policy
  - Search & Results Display Fields
- Documents
  - Document Name (file name)
  - Document Location (file path)
  - Document properties (metadata)
  - Document Text (full text of a text-supported file format or OCR [Definition: Optical Character Recognition] from a captured image of a paper document)

Catalogs are created and managed by Content Central and are stored within the SQL database designated for Content Central.

## 2.4. Capture Types

DirectScan™ (Browser)

This Java™ applet allows users to scan paper into the Web browser using a TWAIN-compliant scanner.

QCard™ (Browser, Monitored Folder, E-mail)	QCards™ contain barcodes used to identify individual paper documents in a batch. Users create and print QCards™ from their Web browser. QCard™-attached documents can be scanned to the Web browser using the DirectScan™ applet, saved to a monitored folder, or sent to a monitored e-mail address.
CustomBarcode (Browser, Monitored Folder, E-mail)	Pages containing barcodes may be used to identify the beginning of paper documents in a batch. The information provided within the barcodes may be assigned to field data automatically. The paper documents can be scanned to the Web browser using the DirectScan™ applet, saved to a monitored folder, or sent to a monitored e-mail address.
PDF Form (AcroForm/XFA) (Browser)	New documents can be generated by filling out a PDF form based on a template in the system.
Drag & Drop Upload (Browser)	Users can drag one or more folders and files to one of two Java™ applets in the Web browser.
Single Upload (Browser)	Users can browse to a single file, classify it if desired, and upload it using the Web browser.
Multi Upload (Browser)	Users can browse to one or more folders and files and upload them using the Web browser.
Electronic (Monitored Folder, E-mail)	Files can be saved to a monitored folder or sent to a monitored e-mail address. They will be left in their native format and can be routed to either the <i>Coding Queue</i> or directly to a catalog.
Image-Only (Monitored Folder, E-mail)	Scanned images (TIFF, PDF, JPEG, BMP, PNG, GIF) can be saved to a monitored folder or sent to a monitored e-mail address. They will be converted to fully-searchable PDF files and can be routed to either the <i>Coding Queue</i> or directly to a catalog.
XML (Monitored Folder, E-mail)	Files can be identified with XML descriptors and saved to a monitored folder or sent to a monitored e-mail address. The XML file can contain document properties used to classify the document when captured. The target catalog and document type can also be defined in the XML file. For more information on the XML descriptor, visit <a href="http://www.ademero.com/XmlSchemas/ContentCentral/XmlCaptureDescriptor/">http://www.ademero.com/XmlSchemas/ContentCentral/XmlCaptureDescriptor/</a> .

## 2.5. Coding Methods

Pre-Capture Coding	Users select a catalog and document type and provide document properties <i>before</i> the capture process. Content Central automatically converts and routes these documents to their storage areas without the need for further user intervention.
Post-Capture Coding	Users designate the catalog, document type, and document properties <i>after</i> the capture process. Content Central routes these documents to the user's <i>Coding Queue</i> where they await catalog and document type selection and document properties coding. After a user codes a document in the <i>Coding Queue</i> , the document is routed to the storage area. Users who capture with this method will find the documents in

their personal *Coding Queue*. The nature of a Post-Capture Coding QCard™ allows the user to reuse the same QCard™.

Versatile Coding

Users select a catalog, document type and *Coding Queue Destination* to which the document should be sent, and are given the option to provide document properties before *and/or* after capture. Documents will be routed to the *Coding Queue* for review and additional document properties before being routed to the storage area.

OCR Only / Capture Only

Users select a catalog and document type before capture, but document properties will *not* be added to these documents. Only the OCR process (images) or capture process (electronic) will be performed, and each document will be routed to its storage area using the filename from the original image or electronic file.

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# Revision History

2013-04-15	User Guide	<i>Default Capture Catalog</i> in <a href="#">Preferences</a> <i>Catalog Filtering</i> in <a href="#">Approval/Work Queue</a>
	Administration Guide	<i>Merge Field Values</i> in <a href="#">Workflow Action Types</a> <i>Combine Notes</i> in <a href="#">Approval Processes</a> <i>Hide After Assignment</i> in <a href="#">AP Groups</a> <i>Inactivity Logout</i> in <a href="#">System Settings</a> <i>Catalog Gathering Performance</i> in <a href="#">System Settings</a> <i>Search Synonym Character</i> in <a href="#">System Settings</a> <i>Minimum Annotations</i> in <a href="#">Dynamic Capture Forms</a> <i>Workflow-only Lookups</i> in <a href="#">Field Lookups</a>
2012-12-12	User Guide	<i>Subfolder paging</i> in <a href="#">Catalog Browser</a> <a href="#">Streaming PDF Documents</a>
	Administration Guide	<i>Combine Field Values</i> in <a href="#">Workflow Action Types</a> <i>Field-Lookup Bypass</i> in <a href="#">System Settings</a> <i>PDF Streaming Viewer Settings</i> in <a href="#">System Settings</a> <i>Allow Limitations on Fields</i> in AP <a href="#">System Settings</a> <i>Catalog Browser Paging</i> in Folder <a href="#">System Settings</a> <i>Auto Open Properties</i> in Folder <a href="#">System Settings</a> <i>Combo-box Paging</i> in Grid-Results <a href="#">System Settings</a> <i>Enable Thumbnails</i> in Grid-Results <a href="#">System Settings</a> <i>Allow non-admin system fields</i> in <a href="#">System Settings</a> <i>Allow capture-form field updates</i> in <a href="#">System Settings</a> <i>Lookup Column</i> in <a href="#">Packet Templates</a> <i>Thumbnail Creation</i> in <a href="#">Managing Catalogs</a> <i>Pages Captured</i> in <a href="#">System Fields</a> <i>Approval-Process Timeframe</i> in <a href="#">Report Templates</a> <i>\$clickid</i> in <a href="#">External Applications</a> <i>Field Permissions</i> in <a href="#">Approval Processes</a> <i>Deleted-Content XML Compliance</i> in <a href="#">System Folders</a> <a href="#">Dynamic Capture Forms</a>
	Barcode Symbolologies	Added Code 128 (EAN-128)
2012-08-31	User Guide	Added <a href="#">Mobile Site</a> <i>Document-Type Filtering</i> in <a href="#">Approval/Work Queue</a> <i>2010 64-bit</i> in <a href="#">Office Integration</a>
	Administration Guide	<i>Global-Field in DocType Update</i> in <a href="#">Trigger Types</a> <i>Report Scheduler</i> in <a href="#">Trigger Types</a> <i>Calculate Range</i> in <a href="#">Workflow Action Types</a> <i>Export Data</i> in <a href="#">Workflow Action Types</a> <i>Generate Report</i> in <a href="#">Workflow Action Types</a> <i>Capture-Type Visibility</i> in <a href="#">System Settings</a> <i>Hide Auto Capture-Date Properties</i> in <a href="#">System Settings</a> <i>Allow Properties DocType Change</i> in <a href="#">System Settings</a> <i>Always Use Full-Text Search Engine</i> in <a href="#">System Settings</a> <i>ODBC drop-down list</i> in <a href="#">Field Details</a> Added <a href="#">Export-Data Templates</a> Added <a href="#">Report Templates</a>

## Revision History

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		<i>Session Expiration</i> in <a href="#">Capture Forms</a> <i>Priority</i> in <a href="#">Capture Jobs</a> <i>Disable ODBC/Workflow</i> in <a href="#">Capture Jobs</a>
	Added <a href="#">Advanced Search Syntax</a> Appendix	
2011-04-29	User Guide	<i>Refresh Grid on DocProp Update</i> in <a href="#">Preferences</a> Added <a href="#">Saved Searches</a> in <a href="#">Searching</a> Office® 2010 compatibility in <a href="#">Editing</a> <i>Key-field lookup at capture</i> in <a href="#">QCards</a>
	Administration Guide	<i>PIN</i> in Approval-Process <a href="#">System Settings</a> <i>Include Creator Folder Setting</i> in <a href="#">System Settings</a> <i>Notification Settings</i> in <a href="#">System Settings</a> <i>Size columns to fit</i> in Grid-Results <a href="#">System Settings</a> <i>Blank-page removal</i> in Image-Capture <a href="#">System Settings</a> <i>Wildcard/Row Search Settings</i> in <a href="#">System Settings</a> <i>Thread &amp; 2-pass OCR Settings</i> in <a href="#">System Settings</a> <i>Run External App</i> for <a href="#">Custom Menu Items</a> <i>Packet lookups</i> in <a href="#">Field-Lookup Integration</a> <i>Allow View in AQ</i> in <a href="#">DocType Permissions</a> <i>New Document</i> option in <a href="#">Zonal Recognition</a> <i>Remove Page</i> option in <a href="#">Zonal Recognition</a> <i>Regular Expressions</i> in <a href="#">Zonal Recognition</a> <i>Use only left portion of field</i> in <a href="#">Folder Building</a> <i>File Version</i> in <a href="#">System Fields</a> <i>Limit duplicates by other field</i> in <a href="#">Field Details</a>
	Added <a href="#">Advanced Search Syntax</a> Appendix	
2010-06-17	Updated Recommended <a href="#">Requirements</a> for Server(s)	
2010-05-28	User Guide	Expirations for <a href="#">Work Queue</a> Added <a href="#">Document Sharing</a>
	Administration Guide	<i>Limit Expiration (Work Queue)</i> in <a href="#">System Settings</a> <i>Guest User</i> option in <a href="#">Users</a> <i>Allow Document Sharing</i> in <a href="#">Permissions</a>
2010-04-15	User Guide	Added <a href="#">Address Book</a> Added <a href="#">Grid-Results Fields</a> Added <a href="#">Event Viewer</a> Added <a href="#">Document-Type QCard™</a> Added <a href="#">Content Central Office Integration</a> Icon info for <a href="#">Approval Queue/Messages</a> DirectScan™ and Electronic for <a href="#">Append/Replace</a> <i>System-Field</i> info in <a href="#">Document Properties</a> <i>Missing Document-Type</i> info in <a href="#">Viewing Packets</a>
	Administration Guide	<i>Drag-and-Drop</i> settings in <a href="#">System Settings</a> <i>PDF Capture</i> settings in <a href="#">System Settings</a> <i>RelayFax Response Capture</i> in <a href="#">System Settings</a> <i>Administration Permissions</i> for <a href="#">Users/Groups</a> Added <a href="#">System Fields</a> <i>Document Creator</i> <a href="#">Permissions</a> <i>Peer-Review</i> routing type for <a href="#">Approval Processes</a>

*Starting Member* option for [Approval Processes](#)  
*Creator* member type for [Approval Processes](#)  
*No-Deadlines* for members in [Approval Processes](#)  
*Custom Member Names* option for [Approval Processes](#)  
*System Field* option for [Approval Processes](#)  
*Global-Field Update* in [Workflow Trigger Types](#)  
*Equals Current Date* for [Workflow Field Evaluation](#)  
*<= Current Date (+ Offset)* for [Field Evaluation](#)  
*Perform Field Lookup* in [Workflow Action Types](#)  
*Merge Packet Field Values* in [Workflow Action Types](#)  
*Duplicate* for [Triggers](#), [Actions](#), [Rules](#), & [Templates](#)  
*System Field* option for [Packet Templates](#)  
Added [Custom Menu Items](#)

Appendices

Added [Supported ODBC Providers](#)

2010-01-07 Updated [Requirements](#) for Server(s) and Client Workstations

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# Part I. User Guide



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# Chapter 1. Introduction

In this chapter you will become familiar with the user interface of Content Central and gain an understanding of the basic procedures and abilities you will have. It's a good idea to read through the entire User Guide; however, if you will only be designated to a single operation, such as *Document Capture*, then you may wish to read only the section that pertains to you.

## 1. User Interface

To access Content Central you will need to launch your preferred Web browser and enter the URL (address) provided by your administrator. Once you've successfully accessed Content Central, you will need to provide your **Username** and **Password** (you should have received from your administrator) to login to the system.

If you would like to prevent having to log in each time, select the **Keep me logged in** check box.

### Note

This option may not be available in all configurations. Selecting the **Logout** button on the main menu will require you to log in again.



*Logging In to Content Central*

## 2. The Main Menu

The main menu is always located at the top of Content Central. From the main menu you can access the **Search**, **Folders**, and **Capture** areas. You can also **Search All Catalogs**, access your **Options**, **Logout** of Content Central, and get **Help**. Administrators can access the administration menu with the **Admin** button.

## 3. The Dashboard

The **Dashboard** displays your most recent [Messages](#), [Approval Queue](#) documents, [Work Queue](#) documents, and [Coding Queue](#) documents. Clicking on any of these panels will take you to that specific

area in Content Central. Access the **Dashboard** at any time by selecting the logo located in the far-left area of the main menu.

The screenshot shows the Content Central Dashboard for user Mark Thomas (MThomas). The interface includes a search bar and navigation buttons. The dashboard is divided into four main sections:

- Messages (1 unread):** A table with columns From, Subject, and Received. One message from CMorgan is listed.
- Work Queue (3):** A table with columns Document, Catalog, and Received. Three documents by Josh Powers are listed.
- Approval Queue (3):** A table with columns Document, Catalog, and Received. Three admission application documents are listed.
- Coding Queue (2):** A table with columns Document, Catalog, and Captured. Two admission application documents are listed.

The **Dashboard**

## 4. The Results Grid

The results grid displays information about documents and other content in the right frame (the *Results Frame*) below the main menu.

Each row in the grid contains a checkbox at the beginning of the row. These checkboxes may be selected to perform document actions on multiple documents at once. Use the **Check** menu to check **All**, check **None**, or **Invert** the value of each checkbox.

Next to each checkbox is a status icon. This icon displays the *Approval-Queue*, *Work-Queue*, or *Check-Out* status of each document in most results grids as defined below:

- Document is in your approval queue.
- Document is on one or more approval processes.
- Document is in your work queue.
- Document is in one or more work queues.
- Document is available for check out.
- Document is currently checked out by another user.
- Document is currently checked out by you.
- Your permissions do not allow you to check out this document.

For icons displayed in the *Messages* folder, see [Chapter 5, The Messages Folder](#). For icons displayed in the *Approval Queue*, see [Section 17, "The Approval Queue \[Enterprise Edition\]"](#). For icons displayed in the *Coding-Queue*, see [Section 8, "The Coding Queue"](#).

Other features of the grid may be useful to you:

### Column Sorting

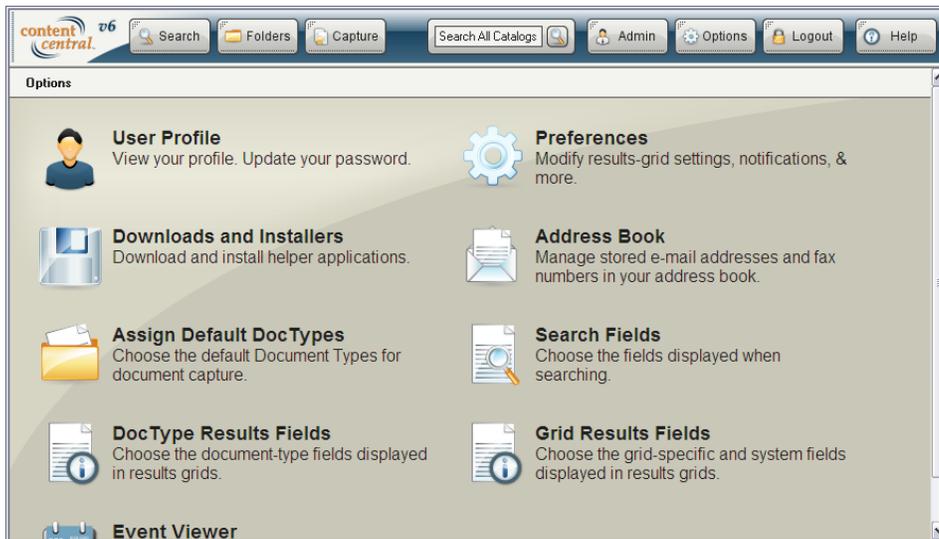
To sort the grid either ascending or descending based on the data in any particular column, click the header for that column (the cell containing the field name). Click it again to alternate the sort direction (ascending vs. descending). The column sorted, as well as the direction sorted, is indicated

on the grid header with the ▲ and ▼ icons. To remove sorting, select the **Remove Sorting** link next to the menu bar.

Field Grouping	You may group the results by one of the columns for a different view of your results. Click and hold the column header you would like to group by, and drag it into the area above the header with the message, "Drag a column header here to group by that column". To revert to the original results view, click and hold the column header again and drag it back into the results grid.
Column Arrangement	You can rearrange the order of the columns in the grid by clicking and holding a column header then moving it to the left or right until two red arrows appear. The new order will be saved for future results.
Column Resizing	You can resize columns in most grids by clicking and holding a column-header divider (the area between two column headers) followed by moving it to the left or right.
Refresh	Select the ↻ icon to refresh the grid at any time.
Export to Excel	The information contained within the grid can be exported to Microsoft® Excel® by selecting the 📄 icon in the upper-right portion of the results-grid frame.

## 5. User Options

The **Options** screen lets you update many settings specific to your user account. Access it by selecting the  button on the main menu.



The **Options** Screen

### 5.1. User Profile

You may update your profile information by selecting the  icon in the **Options** screen. You can change your *name*, *e-mail address*, and *password* depending on your security level.

The screenshot shows the 'Options > Profile' page in Content Central v6. The page title is 'Your Profile' with a subtitle 'You may update your profile from this page.' Below this, there are several input fields: Username (MThomas), First Name (Mark), Last Name (Thomas), E-mail Address (mt@ademero.com), Change Password (masked with asterisks), and Confirm Password (masked with asterisks). At the bottom of the form are two buttons: 'Apply' and 'Cancel'.

User Profile

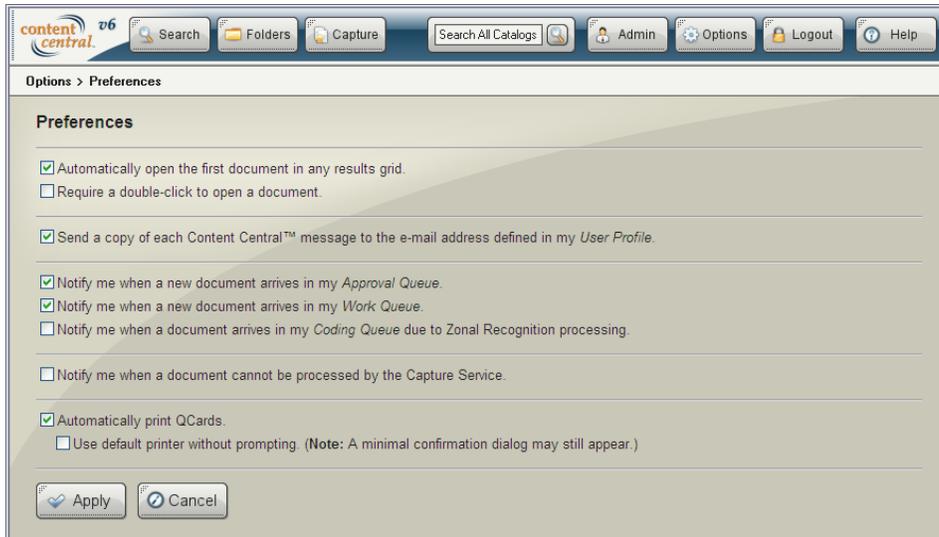
## 5.2. Preferences



There are several system preferences you can configure by selecting the  icon in the **Options** screen. The following list explains each of the preferences.

Language	Select the language that you prefer to use while navigating the application. <b>Default</b> uses the language setting configured in your Web browser.
Default Capture Catalog	This selection determines the default Catalog selection when accessing the Capture area.
Automatically open the first document in any results grid.	When selected, the first document in a results grid will be opened.
Require a double-click to open a document.	By default, a single click on any results-grid row will open the document. This preference will require a double click to open a document.
Refresh grid when changing document properties.	Enabling this feature will cause any list of results to immediately update after document properties have been committed.
Disable PDF Streaming	This option appears when administrators have enabled PDF streaming. Select this checkbox if you wish to disable PDF streaming for your personal account.
Send a copy of each Content Central message to the e-mail address defined in my <i>User Profile</i> .	When selected, a copy of each Content Central message will be sent to your e-mail address.
Notify me when a new document arrives in my <i>Approval Queue</i> . [Enterprise Edition]	When selected, a message will be sent to you every time a document lands in your <i>Approval Queue</i> .

<p>Notify me when a new document arrives in my <i>Work Queue</i>. [Enterprise Edition]</p>	<p>When selected, a message will be sent to you every time a document lands in your <i>Work Queue</i>.</p>
<p>Notify me when a document arrives in my <i>Coding Queue</i> due to Zonal OCR processing. [Enterprise Edition]</p>	<p>When selected, a message will be sent to you when a document lands in your <i>Coding Queue</i> because of a potential problem with Zonal OCR processing.</p>
<p>Notify me when a document cannot be processed by the Capture Service. [Administrators]</p>	<p>When selected, a message will be sent to you when a document cannot be captured.</p>
<p>Automatically print QCards™.</p>	<p>When selected, Content Central will launch the print dialog in your PDF viewer when you select the  button to produce a QCard™.</p>
<p>Use default printer without prompting.</p>	<p>If the previous and current selections are enabled, the print dialog will be bypassed, and your default printer will receive the print job containing the QCards™. Your PDF viewer may require a confirmation for security reasons.</p>



User Preferences

## 5.3. Downloads and Installers



Select the  icon in the **Options** screen to download and/or install helper applications.

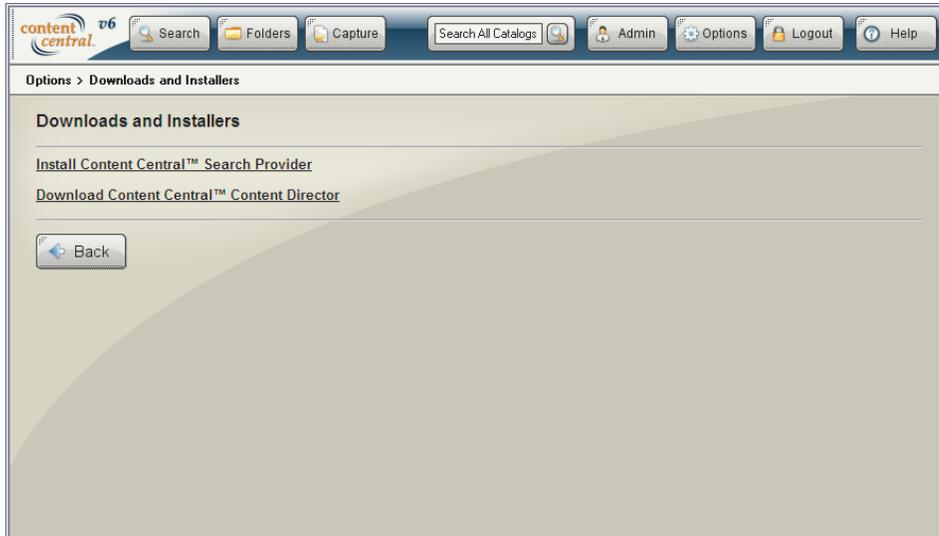
Install Content Central Search Provider

Select this link to install Content Central as one of the search providers in your Web browser. With this feature installed, you will be able to use your Web browser's *Search* function to search for information within Content Central. Your query will be used to search all catalogs where you have the search permission.

Download Content Central *Content Director*

Select this link to install the *Content Director* application on your local desktop computer. This application allows you to edit

documents directly from the Content Central browser interface. Saving a document upon exiting its native application will automatically upload it to the Content Central server. For more information see [Section 9, "Editing Documents"](#).

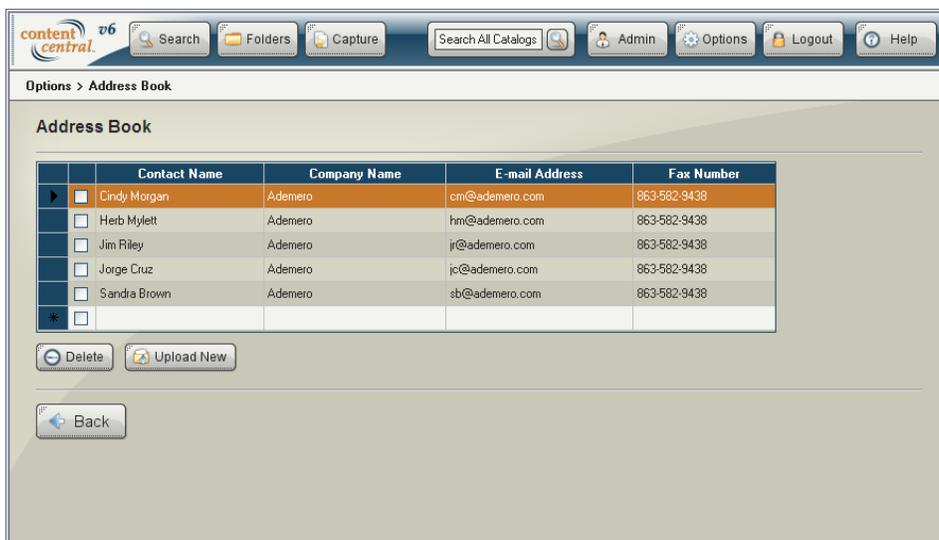


Downloads and Installers

## 5.4. Address Book

Select the  icon in the **Options** screen to access your personal **Address Book**.

Contacts in your address book can be used when sending documents via [e-mail](#) or [fax](#) or [sharing documents](#). Records are stored unique by **Contact Name**.



Address Book

### 5.4.1. Adding or Modifying a Contact

To modify an existing contact, double click the row you would like to modify, make changes, and click off the row to save the changes.

To add a new contact, double click the last row displayed on the current page. You must provide a valid **Contact Name** for each record. All additional columns are optional. When you have finished adding a record, click off the row or select the  button to return to the **Options** screen.

You can upload a comma-delimited text file containing a list of contacts by selecting the  button, browsing to the file, and selecting the  button to process the file. Do not include a header record. Duplicate contacts will be discarded. The required format for the file is as follows:

Contact Name (required), Company Name (optional), E-mail Address (optional), Fax Number (optional)

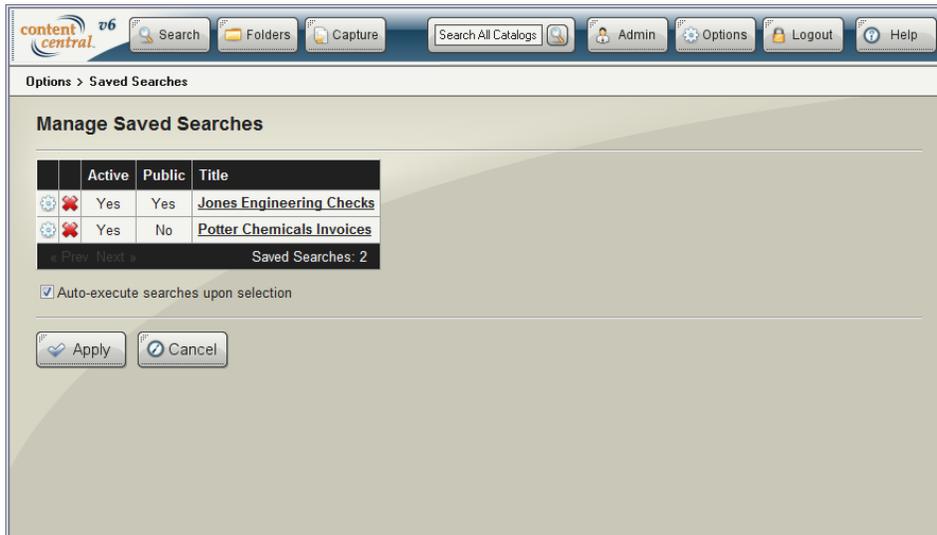
### 5.4.2. Deleting One or More Contacts

To remove one or more contacts from your address book, select the checkbox in the row or rows you would like to delete from the current page, and select the  button.

## 5.5. Saved Searches

Manage your saved searches by selecting the  icon in the **Options** screen.

To automatically perform a search when a saved search has been selected from the *Search* area, select **Auto-execute searches upon selection**. Select the  button to apply your changes and return to the **Options** screen.



*Saved Searches*

### 5.5.1. Modifying a Saved Search

To modify a search query, select the  icon in the appropriate row. Here you can edit the **Title**, determine whether the query will be **Enabled** and available for searching, and select whether the query will be

available for other users by making it **Public**. Select the  button when you have finished modifying the query.

### 5.5.2. Deleting a Saved Search

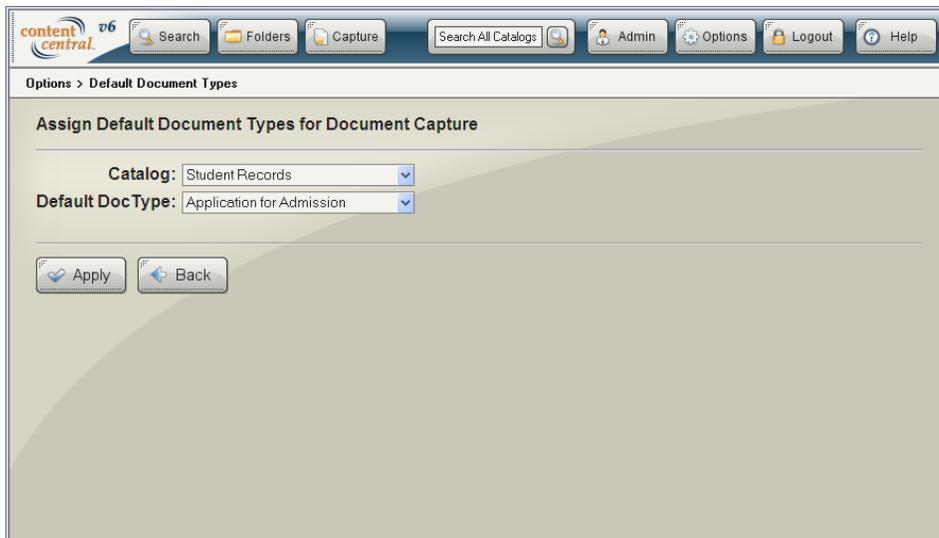
To delete a search query, select the  icon in the appropriate row, followed by selecting the  button to permanently delete the saved search.

## 5.6. Default Document Types

Choose your **Default Document Types** for each catalog by selecting the  icon in the **Options** screen. A default document type is used for the following:

- Determines the document type of one or more uploaded files when using the results-grid drag-and-drop tool in the **Catalog Browser**.
- Determines the document type used when pasting one or more documents in the **Catalog Browser**.
- Appears first in document-type drop-down lists in the **Capture** frame and in the **Drag & Drop Upload** applet.

When you have finished selecting a default document type for a catalog, select the  button to save the changes. Select the  button to return to the **Options** screen.



*Default Document Types*

## 5.7. Search Fields

You may pick the fields you wish to use during a search by selecting the  icon in the **Options** screen. Select the catalog and document type that you would like to manage.

Use the  icon to add fields from the **Available Fields** box to the **Search Fields** box.

Use the  and  icons to change the order that the fields will appear on the screen.

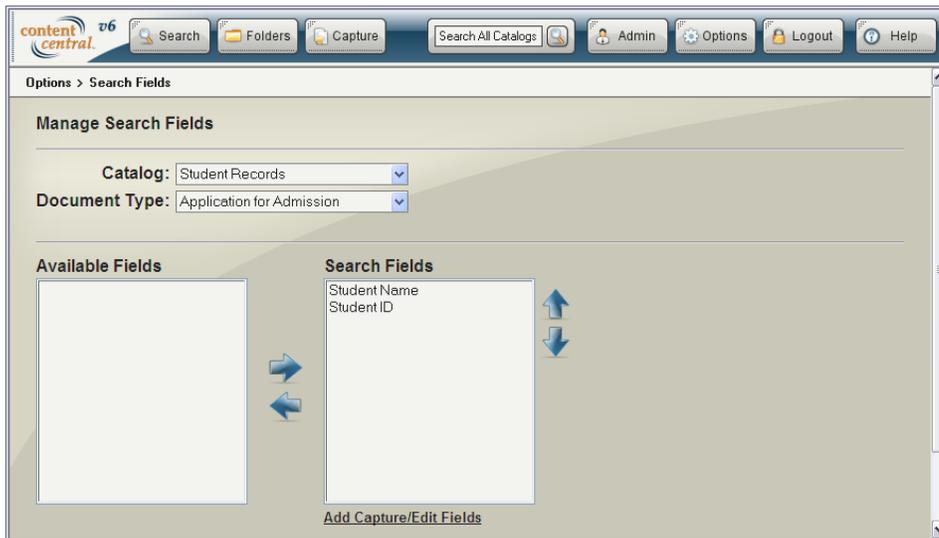
The administrator may have defined a default set of fields that you can remove, if desired, using the  icon.

 **Tip**

Select **Add Capture/Edit Fields** below the **Search Fields** box to save time and add the fields designated as *capture fields*.

When you have finished selecting fields for a document type, select the  button to save the changes.

Select the  button to return to the **Options** screen.



User *Search Fields*

## 5.8. PIN

Define your personal identification number by selecting the  icon in the **Options** screen.

Your PIN will be needed when approving or rejecting documents. For more information, see [Section 17.1, “Approving”](#).

When you have finished adding or modifying your PIN, select the  button to save the changes.

Select the  button to return to the **Options** screen.

## 5.9. DocType Results Fields

You may pick the document-type fields you wish to see in the results grid by selecting the  icon in the **Options** screen.

Select the catalog and document type that you would like to manage.

Use the  icon to add fields from the **Available Fields** box to the **Results Fields** box.

Use the  and  icons to change the order that the fields will appear in the grid.

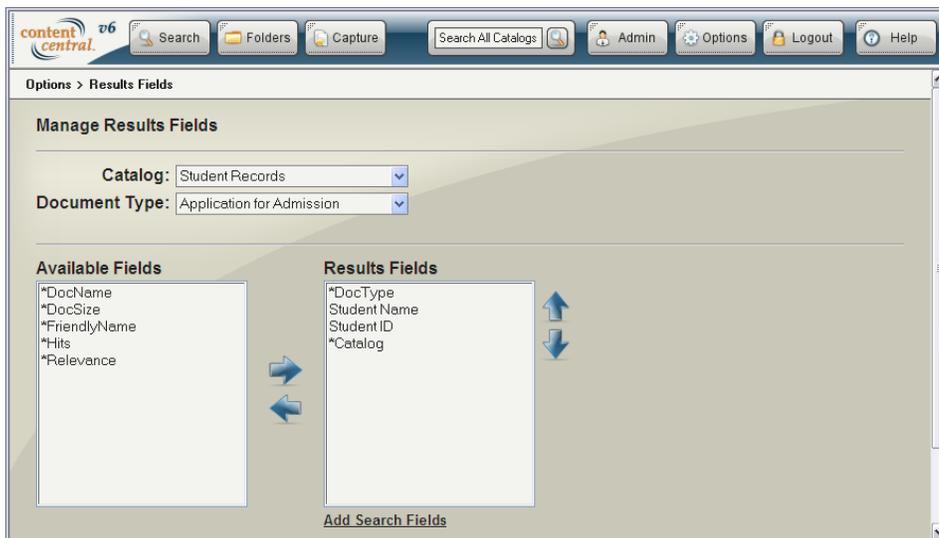
The administrator may have defined a default set of fields that you can remove, if desired, using the  icon.

 **Tip**

Select **Add Search Fields** below the **Results Fields** box to save time and add the fields from the **Search Fields** option.

When you have finished selecting fields for a document type, select the  button to save the changes.

Select the  button to return to the **Options** screen.



*User Results Fields*

## 5.10. Grid Results Fields

You may pick the grid-specific fields and system fields you wish to see in each results grid by selecting

the second  icon in the **Options** screen.

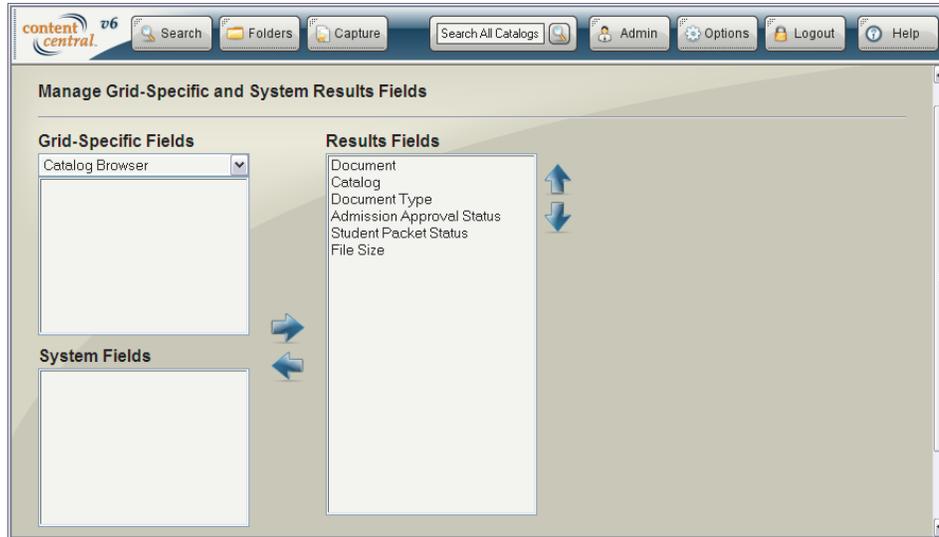
Each grid type can have its own unique set of fields displayed as columns. Select the type of grid you would like to configure by selecting it from the drop-down list under the **Grid-Specific Fields** label.

Use the  icon to add fields from the **Grid-Specific Fields** and **System Fields** boxes to the **Results Fields** box.

Use the  and  icons to change the order that the fields will appear in the grid.

When you have finished selecting fields for a grid type, select the  button to save the changes.

Select the  button to return to the **Options** screen.



User *Grid-Results Fields*

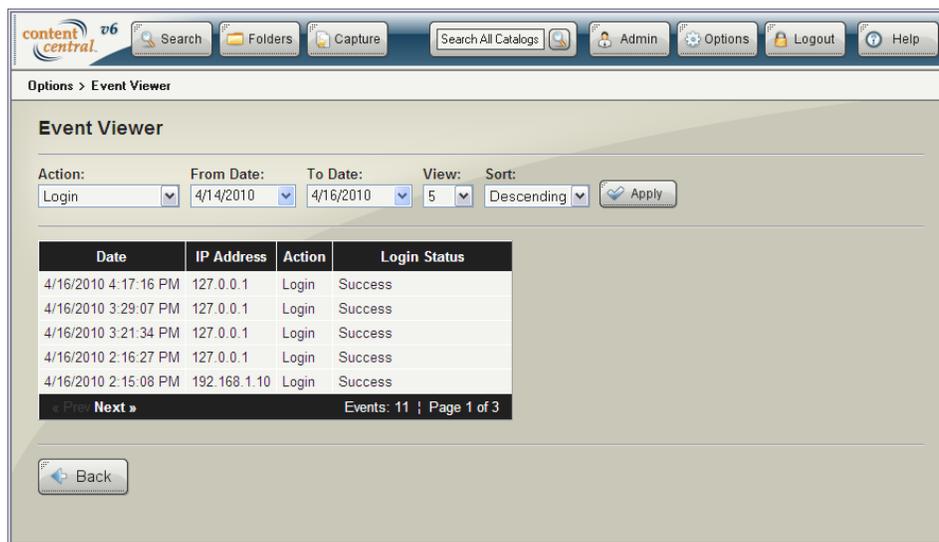
## 5.11. Event Viewer

The event viewer allows you to track actions that you have performed while logged in to Content Central.

The event log also maintains records of documents that you have captured. Access it by selecting the  icon from the **Options** screen.

You may filter your view by selecting any combination of options from the drop-down list above the log table. Select the  button to update the log table after you've chosen your filters. Use the paging bar below the log table to view additional pages of log entries.

Select the  button to return to the **Options** screen.



*Event Viewer*

## 6. Getting Help

If you get stuck or need to reference this documentation at any time, select the  button at the top of the current dialog.

# Chapter 2. Capturing Documents

This chapter will teach you how to capture both paper documents (from a scanning device) and electronic documents. If you haven't read the introductory sections, [Capture Types](#) and [Coding Methods](#), you should do that now.

Access the **Capture** frame by selecting the  button from the main menu.

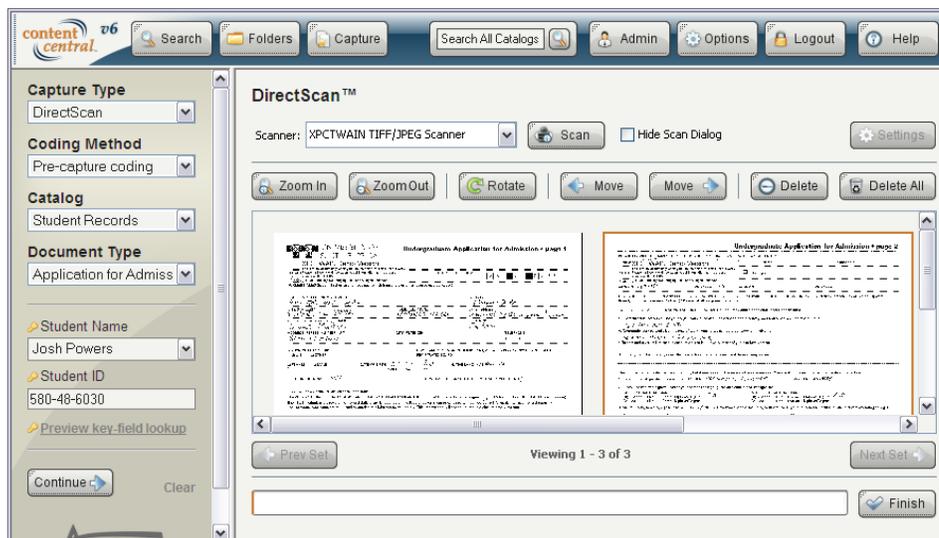
## 1. Capturing Paper Documents - DirectScan™

The **DirectScan** applet allows you to capture paper documents from a scanning device connected to your computer. The following describes each of the coding methods available when capturing with **DirectScan**.

### 1.1. Pre-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *before* scanning.

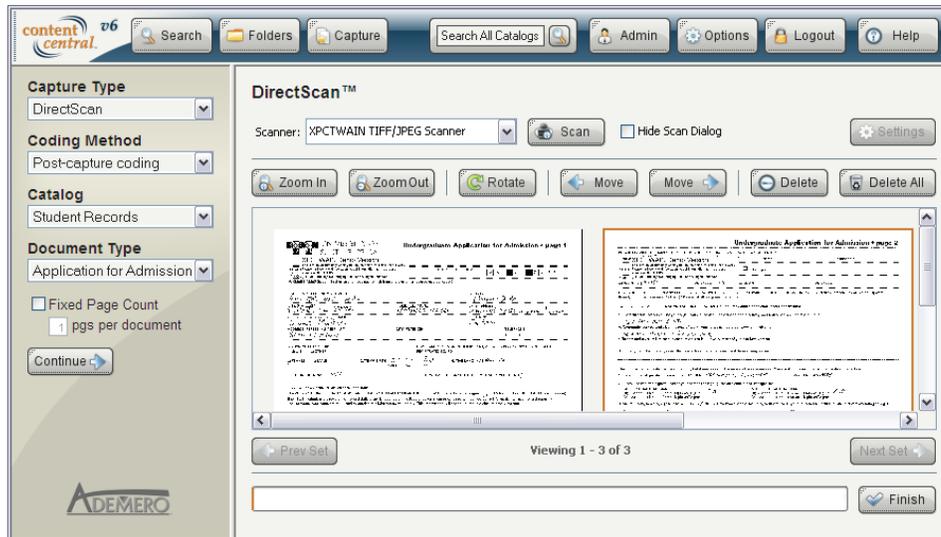
1. Select the **DirectScan Capture Type**.
2. Select the **Pre-capture coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
5. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
6. Select the  button to launch the **DirectScan** applet.
7. Scan the document as described in [Section 1.5, "Using The DirectScan™ Applet"](#).



## 1.2. Post-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *after* scanning. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

1. Select the **DirectScan Capture Type**.
2. Select the **Post-capture coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
5. Select the  button to launch the **DirectScan** applet.
6. Scan the document as described in [Section 1.5, “Using The DirectScan™ Applet”](#).



Post-Capture Coding with DirectScan

## 1.3. Versatile Coding

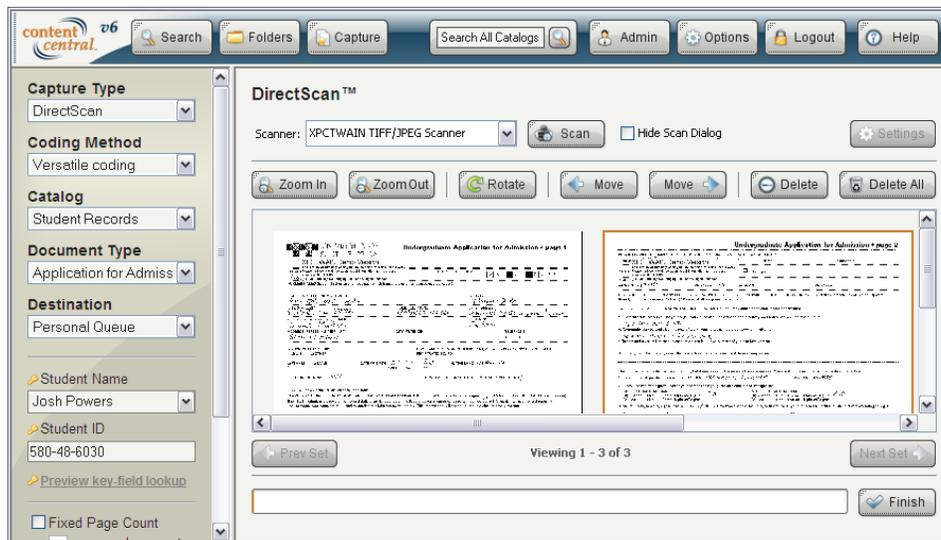
Use this method of capture when you wish to capture a paper document and provide the document properties for that document before scanning, after scanning, or at both times. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

1. Select the **DirectScan Capture Type**.
2. Select the **Versatile coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Choose whether you want this document to be sent to your *Personal Queue* or the *Shared Queue*.

 **Note**

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
6. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
7. Select the  button to launch the **DirectScan** applet.
8. Scan the document as described in [Section 1.5, “Using The DirectScan™ Applet”](#).



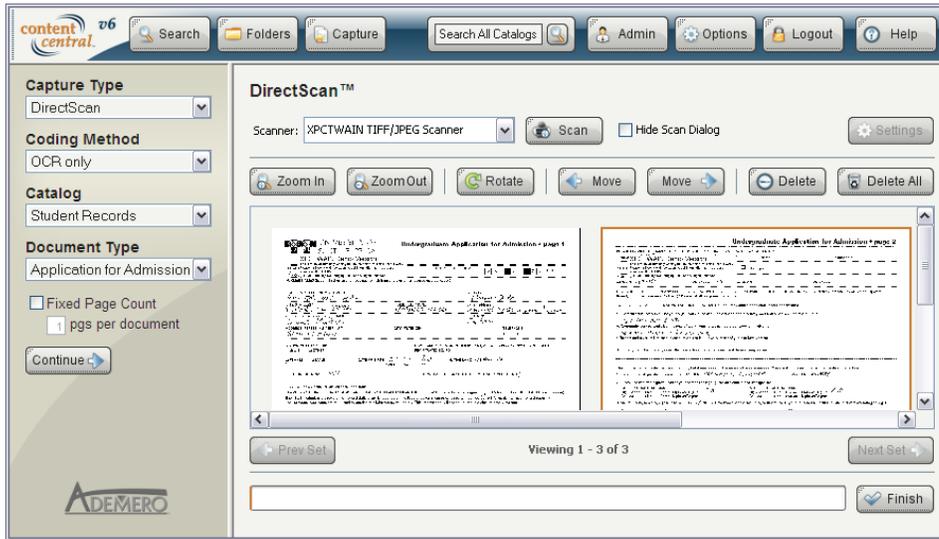
Versatile Coding with DirectScan

## 1.4. OCR Only

Use this method of capture when you wish to capture only the (typed) full-text of a document. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

1. Select the **DirectScan Capture Type**.
2. Select the **OCR only Coding Method**.
3. Select a catalog and document type to add the documents to.
4. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
5. Select the  button to launch the **DirectScan** applet.

- Scan the document as described in [Section 1.5, “Using The DirectScan™ Applet”](#).

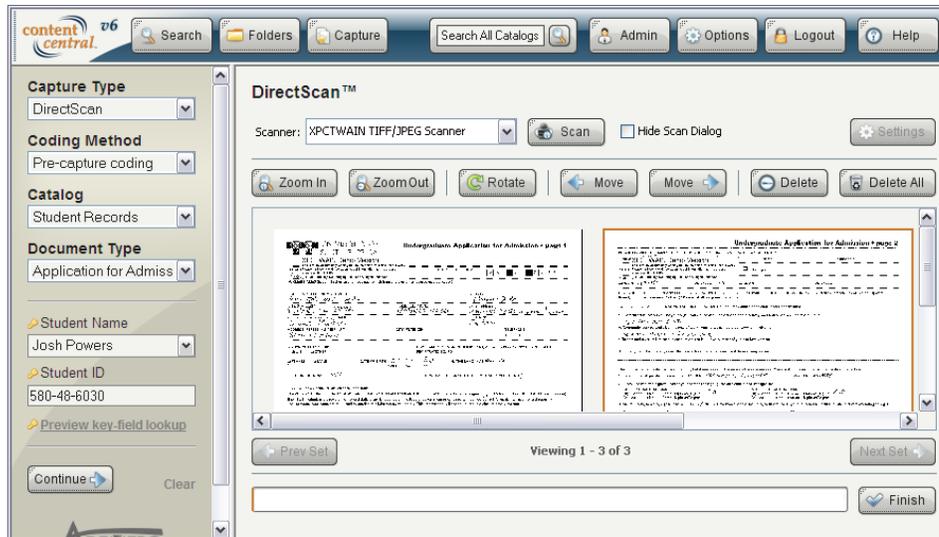


OCR-only Coding with DirectScan

## 1.5. Using The DirectScan™ Applet

This Java® applet allows you to capture paper documents with a TWAIN-compliant scanner connected to your computer. Once you've selected the **Continue** button from within the **Capture** frame, the DirectScan™ applet will launch in the right frame of Content Central. You may be asked to allow the applet to launch from within your browser. This is normal behavior. Once the applet has launched, perform the following steps:

- Select the appropriate scanning device from the **Scanner** list.
- Place the documents in your scanner's document feeder.
- Optional* If you would like to bypass your scanner's software dialog, select the **Hide Scan Dialog** checkbox and then select the **Settings** button to choose the scan settings.
- Select the **Scan** button.
- Choose the appropriate settings and options (if any) for your scanner and initiate the scanning process. When the scanner has completed, the images will appear in the DirectScan™ applet.
- Review the scanned images (see [Section 1.5.1, “Image Reviewing Tools”](#)). Use the horizontal scroll bar at the bottom of the image-preview frame to view images outside of the viewing area. Images will be grouped in sets of 25. To move from one group of images to another, select the **Prev Set** or **Next Set** buttons. If you wish to rescan the images, select the **Delete All** button and repeat steps 2 through 4.
- Once you are satisfied with the scanned images, select the **Finish** button. The images will be uploaded to the Content Central server. The bar to the left of the button will indicate progress of the upload process.



The DirectScan™ Applet

### 1.5.1. Image Reviewing Tools

The following tools, located above the image-preview frame, can be used to assist with the quality assurance process



Increases the visible dimensions of all images in the current image set



Decreases the visible dimensions of all images in the current image set



Rotates the selected image(s) 90 degrees clockwise



Moves the selected image before the previous image



Moves the selected image after the next image



Deletes the selected image(s) from the current image set

## 2. Capturing Paper Documents - QCards™

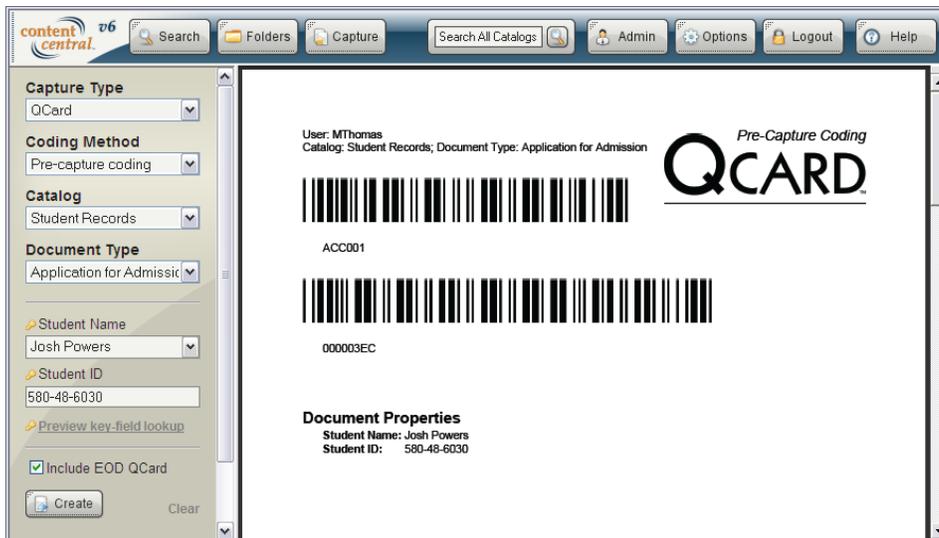
The following describes each of the coding methods available when capturing paper documents with QCards™.

### 2.1. Pre-Capture Coding

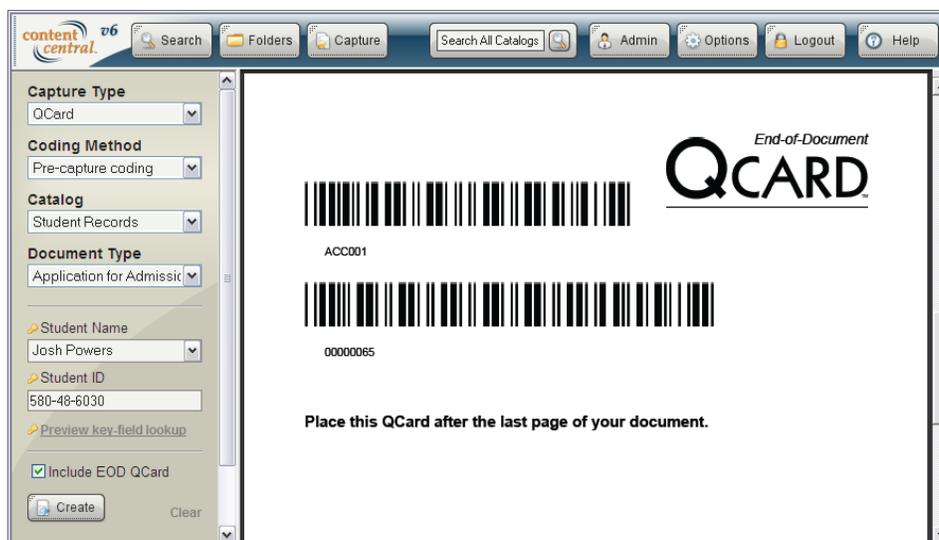
Use this method of capture when you wish to capture a paper document and provide the document properties for that document *before* scanning.

1. Select the **QCard Capture Type**.

2. Select the **Pre-capture coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
5. Optional: You can make this a Fixed Page Count QCard™ by selecting the checkbox and providing a number of **pgs per document**.
6. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCard™.
7. Optional: You can include an End-of-Document QCard™ by selecting the checkbox.
8. Select the  button to generate the QCard™.
9. Print the QCard™.
10. Place the QCard™ on top of the document to be scanned. Place the optional End-of-Document QCard™ at the end of the document.
11. Scan the documents using your scanning device.



A Pre-Capture Coding QCard™

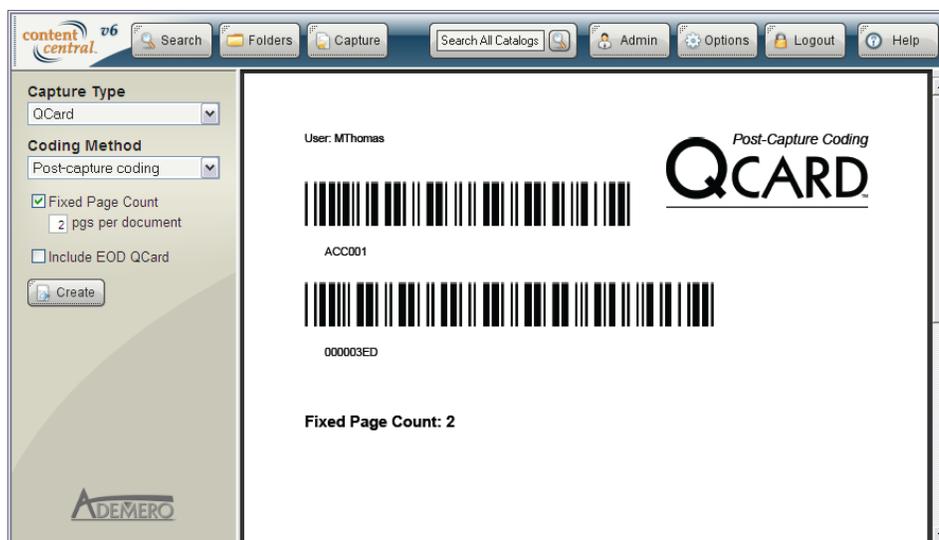


An Included End-of-Document QCard™

## 2.2. Post-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *after* scanning. This QCard™ may be used as a *Fixed Page Count QCard™* allowing you to scan multiple documents in with only one QCard™ as long as each document consists of the number of pages specified.

1. Select the **QCard Capture Type**.
2. Select the **Post-capture coding Coding Method**.
3. Optional: You can make this a Fixed Page Count QCard™ by selecting the checkbox and providing a number of **pgs per document**.
4. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCard™.
5. Optional: You can include an End-of-Document QCard™ by selecting the checkbox.
6. Select the  button to generate the QCard™.
7. Print the QCard™.
8. Place the QCard™ on top of the [first] document to be scanned. Place the optional End-of-Document QCard™ at the end of the last document.
9. Scan the documents using your scanning device.



A Post-Capture Coding QCard™

## 2.3. Versatile Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document before scanning, after scanning, or at both times. This QCard™ may be used as a *Fixed Page Count* QCard™ allowing you to scan multiple documents in with only one QCard™ as long as each document consists of the number of pages specified.

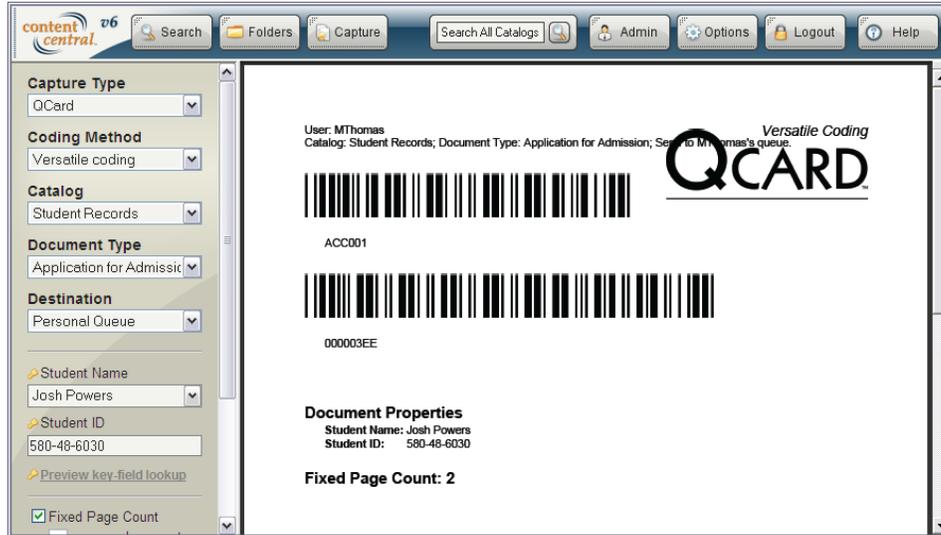
1. Select the **QCard Capture Type**.
2. Select the **Versatile coding Coding Method**.
3. Select a catalog and document type to add the documents to.
4. Choose whether you want this document to be sent to your *Personal Queue* or the *Shared Queue*.

### Note

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
6. Optional: You can make this a Fixed Page Count QCard™ by selecting the checkbox and providing a number of **pgs per document**.
7. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCard™.
8. Optional: You can include an End-of-Document QCard™ by selecting the checkbox.
9. Select the  button to generate the QCard™.

10. Print the QCard™.
11. Place the QCard™ on top of the [first] document to be scanned. Place the optional End-of-Document QCard™ at the end of the last document.
12. Scan the documents using your scanning device.

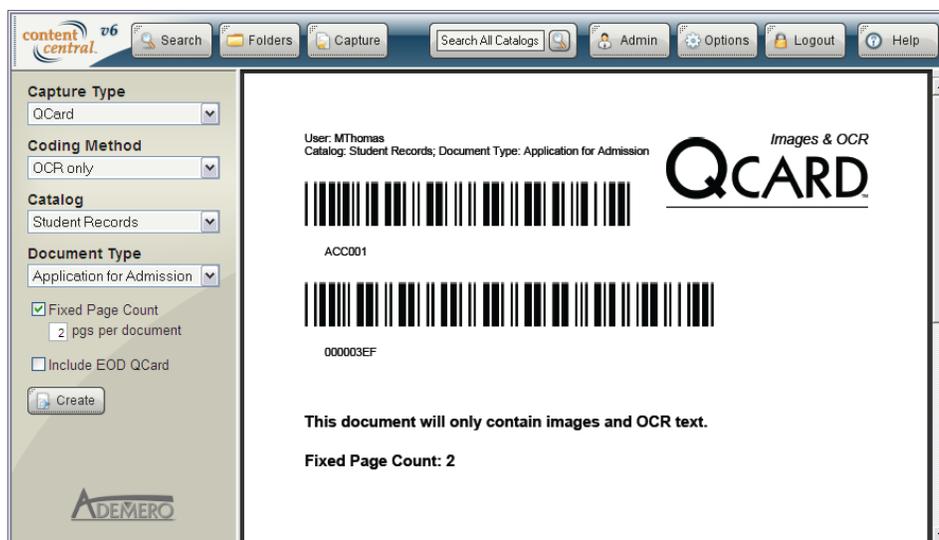


A Versatile Coding QCard™

## 2.4. OCR Only

Use this method of capture when you wish to capture only the (typed) full-text of a document. This QCard™ may be used as a *Fixed Page Count* QCard™ allowing you to scan multiple documents in with only one QCard™ as long as each document consists of the number of pages specified.

1. Select the **QCard Capture Type**.
2. Select the **OCR only Coding Method**.
3. Select a catalog and document type to add the documents to.
4. Optional: You can make this a Fixed Page Count QCard™ by selecting the checkbox and providing a number of **pgs per document**.
5. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCard™.
6. Optional: You can include an End-of-Document QCard™ by selecting the checkbox.
7. Select the  button to generate the QCard™.
8. Print the QCard™.
9. Place the QCard™ on top of the [first] document to be scanned. Place the optional End-of-Document QCard™ at the end of the last document.
10. Scan the documents using your scanning device.



An OCR Only QCard™

### 3. Capturing Paper Documents - Document-Type QCard™

Document-Type QCards™ can be printed and used to change the document type within a batch of paper documents sharing the same document properties.

 **Note**

A Document-Type QCard™ can be used more than once and is compatible with any *coding method*.

#### Example 2.1. Document-Type QCard™ Example

A user creates a **Pre-capture coding** QCard™ for the primary (first) document type in the batch to be scanned. This QCard™ specifies document properties for all documents in the batch to be scanned.

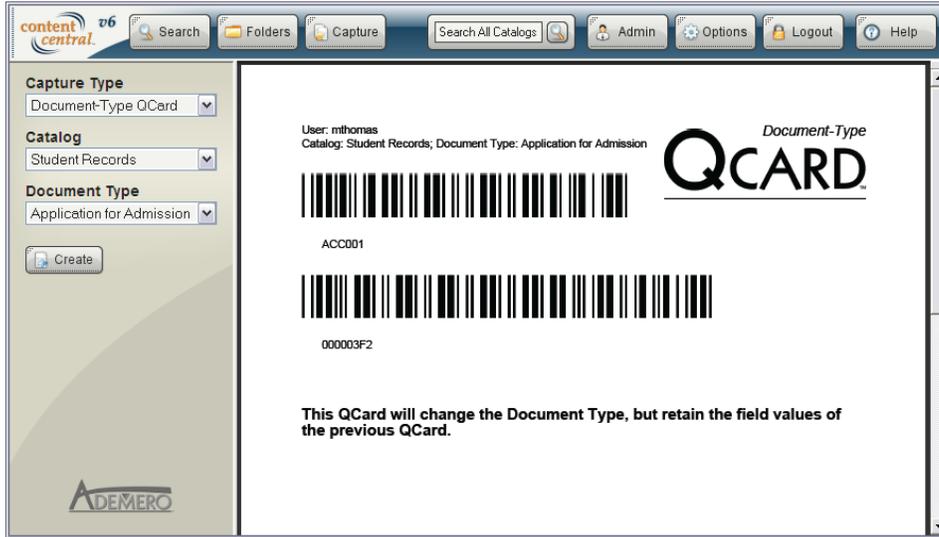
A Document-Type QCard™ is printed for every additional document type in the batch. These QCards™ are placed in front of the document they represent.

The user scans the batch of documents. The Capture Service splits the batch into individual PDF documents based on the document type represented by each QCard™, and all documents receive the document properties represented by the **Pre-capture coding** QCard™.

#### 3.1. Creating a Document-Type QCard™

1. Select the **Document-Type QCard Capture Type**.
2. Select a catalog and document type.
3. Select the  button to generate the QCard™.
4. Print the QCard™.
5. Place the QCard™ on top of its document to be scanned.

6. Assemble the batch of documents, making sure the first QCard™ for the batch is a regular QCard™, and scan the documents using your scanning device.



A Document-Type QCard™

## 4. Capturing Paper Documents - QCard™ Packet

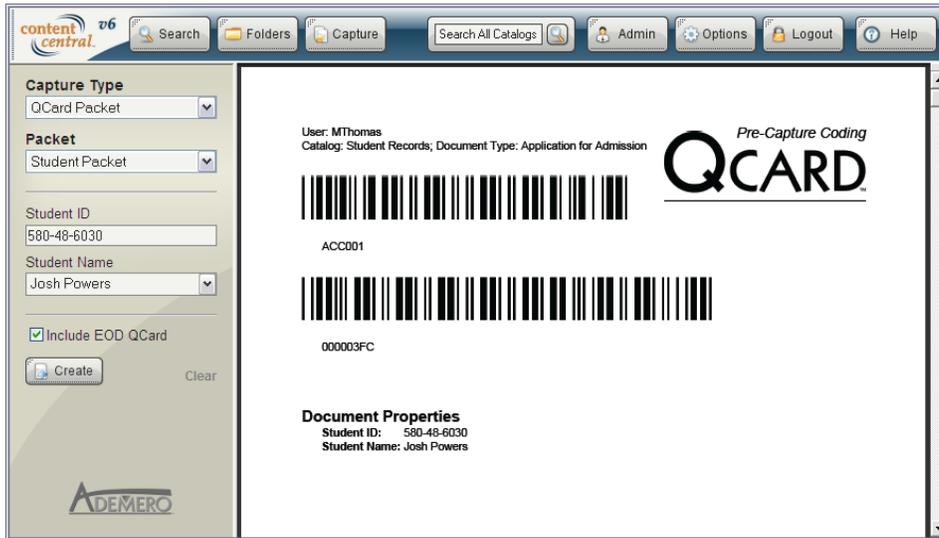
QCard™ Packets are based on packet templates defined by your administrator. This capture type allows you to produce multiple QCards™ in one step.

### 4.1. Creating a QCard™ Packet

Use this method of capture when you wish to capture a packet of paper documents.

1. Select the **QCard Packet Capture Type**.
2. Select the **Packet** template.
3. Enter information about the documents into the field text boxes. Only the fields shared among all the document types in the packet template will be visible. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
4. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field(s) must be available on the QCards™.
5. Optional: You can include one End-of-Document QCard™ at the end of the packet by selecting the checkbox.
6. Select the  **Create** button to generate the packet of QCards™.
7. Print the QCards™.
8. Place each QCard™ on top of its document to be scanned. Place the optional End-of-Document QCard™ at the end of the packet.

- Scan the documents using your scanning device.

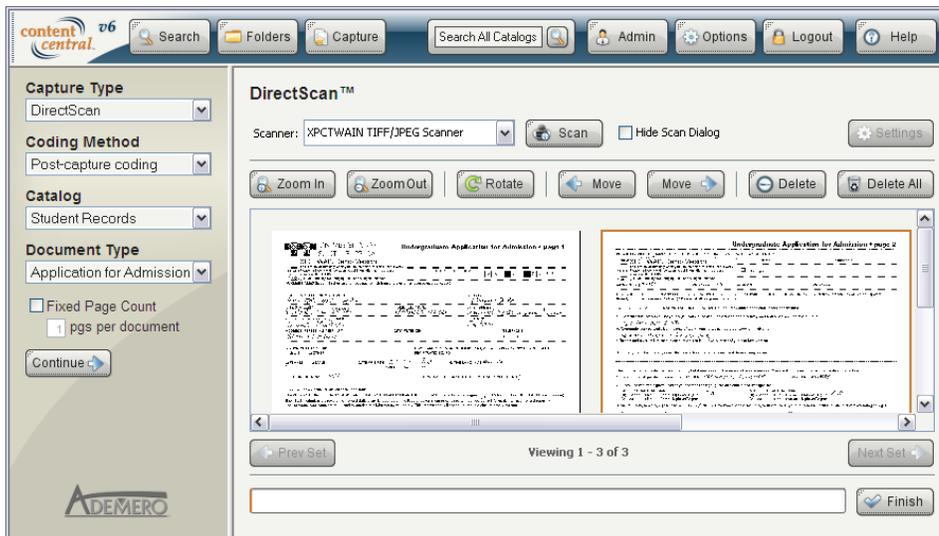


A QCard™ Packet

## 5. Capturing Paper Documents - Custom Barcode

You can scan documents containing custom barcodes with the **Custom Barcode Capture Type**, utilizing the DirectScan™ applet.

- Select the **Custom Barcode Capture Type**.
- Select a catalog and document type to add the document to.
- Select the **Continue** button to launch the **DirectScan** applet.
- Scan the document as described in [Section 1.5, “Using The DirectScan™ Applet”](#).



## 6. Capturing Electronic Documents

If you would like to capture documents and/or other files that you have local access to, you may use these features to import those documents or files into Content Central. Single files can be uploaded using the **Capture** frame, and multiple files can be uploaded using the **Drag & Drop Upload** applet in the [Catalog Browser](#).

### 6.1. Using the Capture Frame

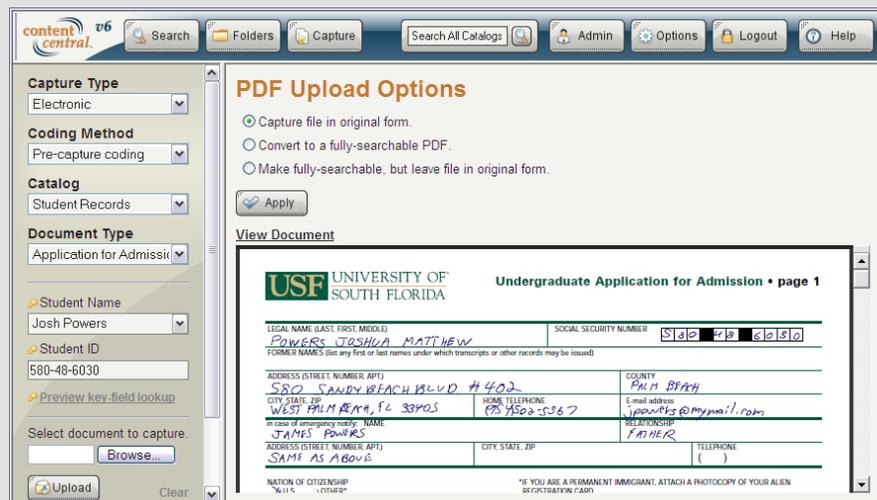
Files can be individually uploaded using the **Electronic Capture Type** in the **Capture** frame. The following sections describe the various **Coding Methods** available when uploading documents.

 **Note**

When uploading an existing PDF document, you will be presented with three upload options before the document is committed to the catalog.

- |   |   |
|---|---|
| <p>Capture file in original form</p>                          | <p>The document will be left as-is and committed to the catalog with the document properties supplied. If the document does not already contain OCR text for full-text searching, the only information that will be searchable will be the document properties.</p> |
| <p>Convert to a fully-searchable PDF</p>                      | <p>The document will be converted to a new PDF containing document properties and OCR for full-text searches.</p>   |
| <p>Make fully-searchable, but leave file in original form</p> | <p>Images will be processed for OCR text, but the file will remain in its original format. The OCR and document properties will be stored only in the Content Central database.</p>   |

The document may be viewed in the area below these options by selecting the **View Document** link. After choosing an upload option, select the  button to complete the upload process.

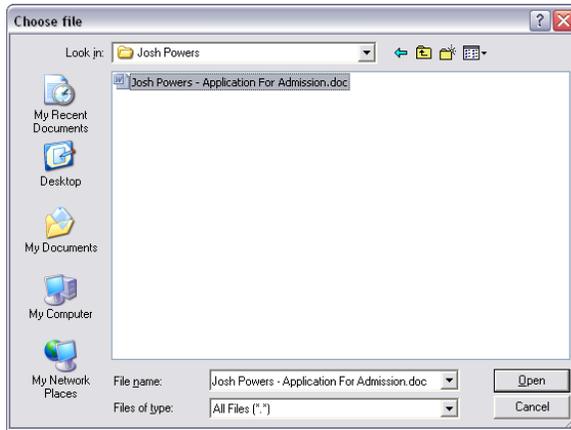


PDF Upload Options

### 6.1.1. Pre-Capture Coding

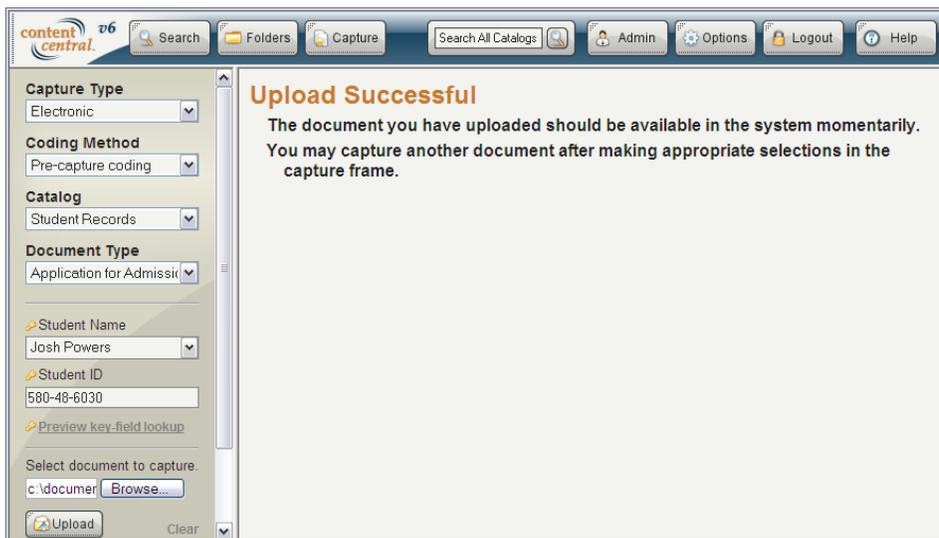
Use this method of capture when you wish to capture an electronic document and provide the document properties for that document *before* uploading.

1. Select the **Electronic Capture Type**.
2. Select the **Pre-capture coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
5. Browse to the location of the local file.



*Browsing for an Electronic File*

6. Select the  **Upload** button to begin the upload process.

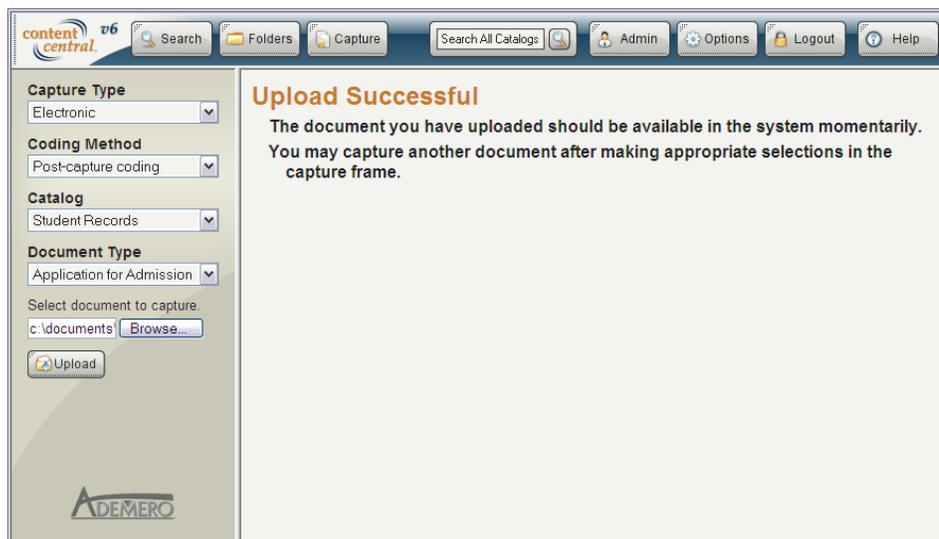


*Capturing an Electronic File with Pre-Capture Coding*

## 6.1.2. Post-Capture Coding

Use this method of capture when you wish to capture an electronic document and provide the document properties for that document *after* uploading.

1. Select the **Electronic Capture Type**.
2. Select the **Post-capture coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Browse to the location of the local file.
5. Select the  button to begin the upload process.



Capturing an Electronic File with Post-Capture Coding

## 6.1.3. Versatile Coding

Use this method of capture when you wish to capture an electronic document and provide the document properties for that document before uploading, after uploading, or at both times.

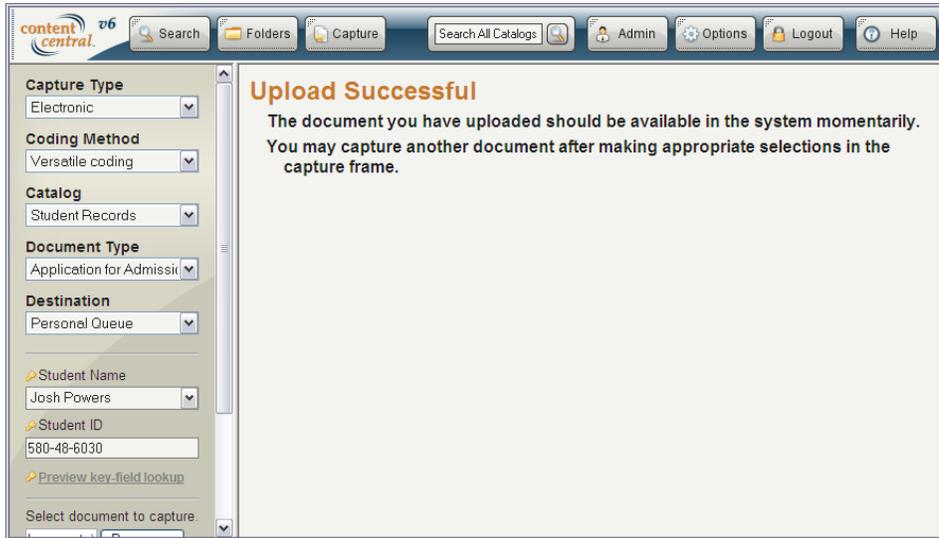
1. Select the **Electronic Capture Type**.
2. Select the **Versatile coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Choose whether you want this document to be sent to your *Personal Queue* or the *Shared Queue*.

### Note

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

6. Browse to the location of the local file.
7. Select the  button to begin the upload process.

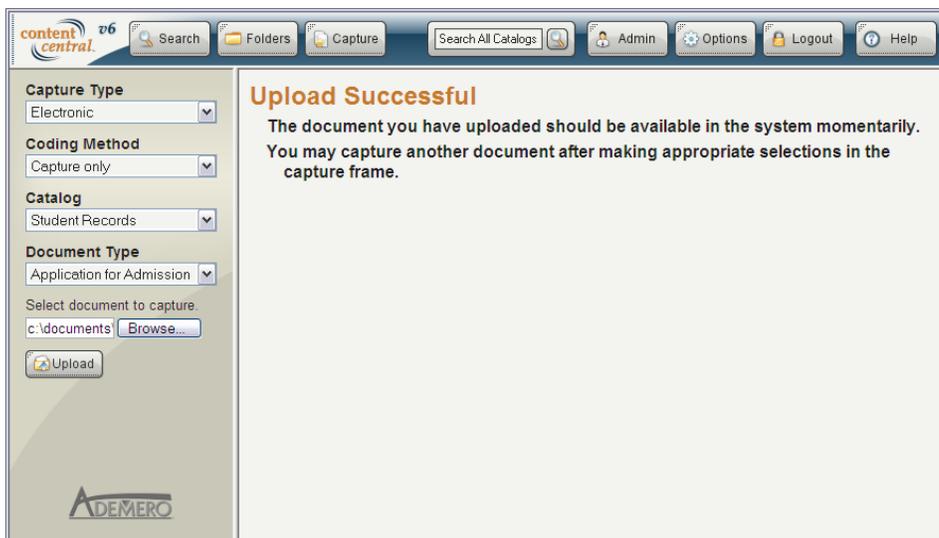


Capturing an Electronic File with Versatile Coding

### 6.1.4. Capture Only

Use this method of capture when you wish to capture an electronic document without providing any document properties.

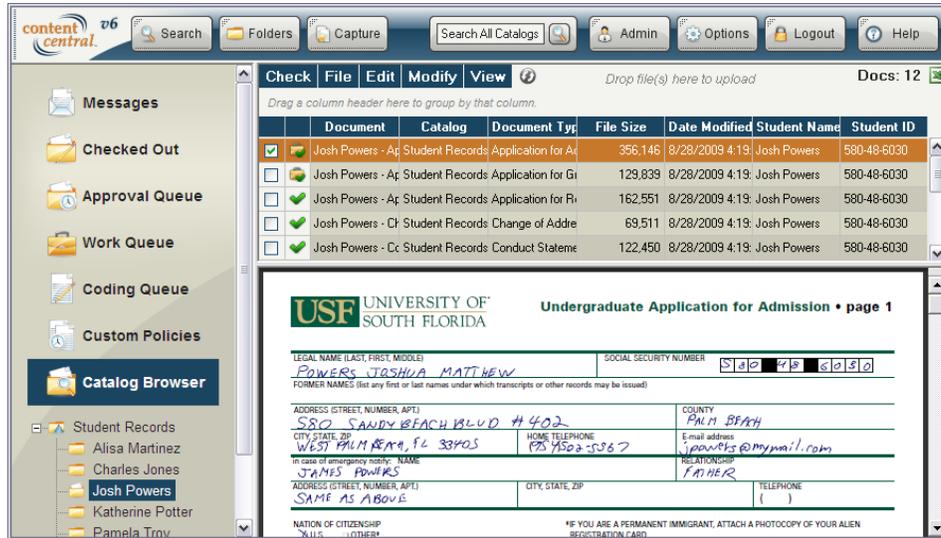
1. Select the **Electronic Capture Type**.
2. Select the **Capture only coding Coding Method**.
3. Select a catalog and document type to add the document to.
4. Browse to the location of the local file.
5. Select the  button to begin the upload process.



Capturing an Electronic File As Is

## 6.2. Using the Drag & Drop Upload Applets

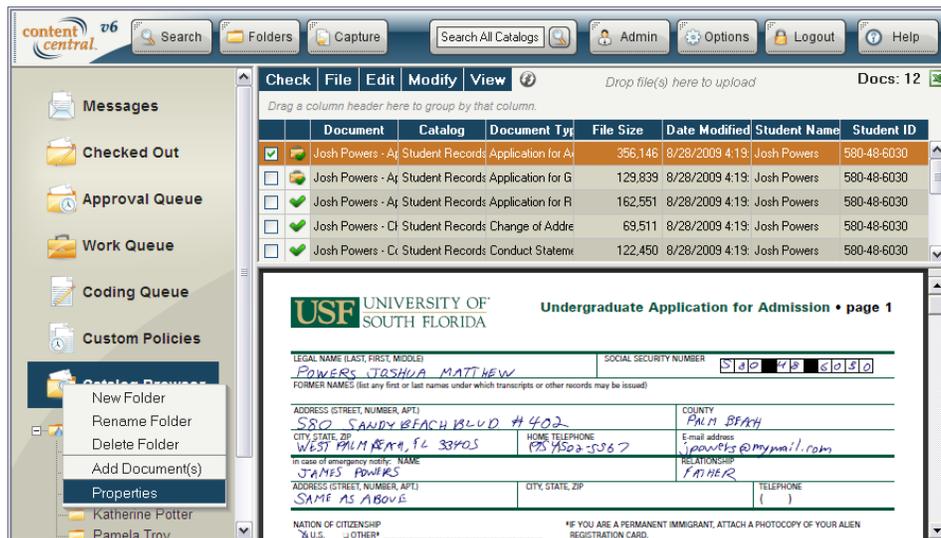
Documents and other content can be uploaded in three different ways using the [Catalog Browser](#). To access the **Catalog Browser**, select the  button from the main menu followed by the  icon in the left frame. Next, select a folder to upload one or more documents into. The following sections describe how to upload documents and other content inside the **Catalog Browser**.



Selecting a Folder to Upload Documents in the **Catalog Browser**

### 6.2.1. Using the Context Menu or File Menu

Any folder in the **Catalog Browser** tree can be right-clicked to produce a context menu containing the **Add Document(s)** menu item. This same menu item can be accessed from the **File** menu in the **Results Frame**. After selecting this menu item, the **Drag & Drop Upload** applet will appear in a new window.



The **Catalog Browser** Context Menu

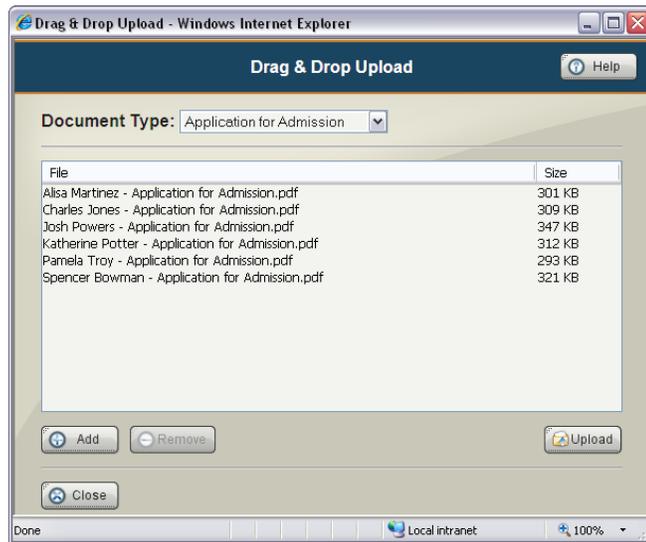
Files can be queued for upload in two ways. Selecting the  button will provide you with a browse dialog used to choose one or more files you have local access to.

Select the appropriate **Document Type** from the drop-down list.

You can also drag folders and files from your computer desktop or a system file explorer and drop them into the area labeled **Drop Files Here**.

Use the  button to remove one or more files from the queue.

After queuing one or more files or folders, select the  button to upload the files to the Content Central server. Select the  button to cancel the upload.



The **Drag & Drop Upload** Dialog

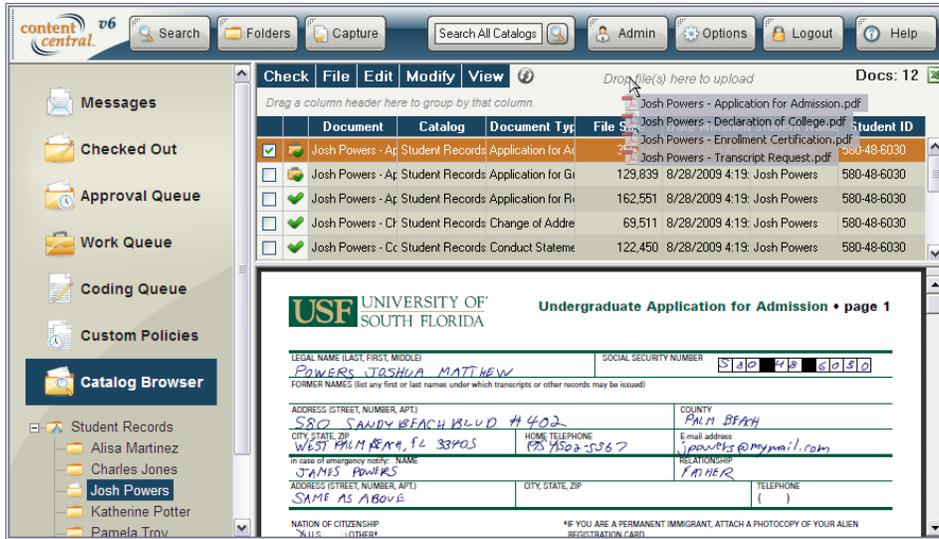
### 6.2.2. Using the Results-Frame Upload Area

One or more folders or files can be dragged from your computer desktop or system file explorer and dropped into the area of the *Results Frame* labeled **Drop files here to upload**.

The upload process will begin immediately after files have been dropped into the designated area. Select the  icon to cancel the upload.

 **Note**

The default document type chosen for the catalog will be used to identify the uploaded documents. For more information, see [Section 5.6, “Default Document Types”](#).

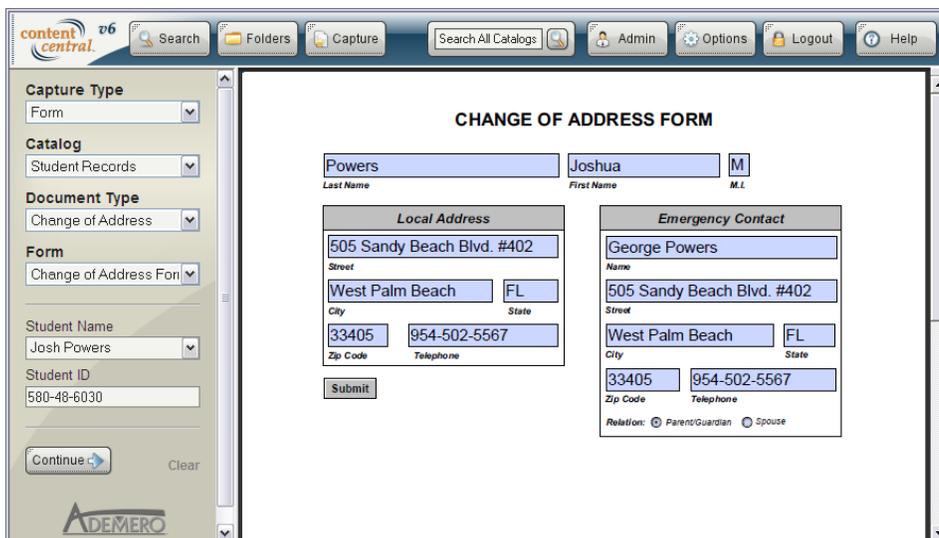


Dragging Files Into the Results Frame

## 7. Creating New Documents From PDF-Form Templates

Use this capture type when you want to generate a new document from a PDF-Form template.

1. Select the **Form Capture Type**.
2. Select a catalog and document type to add the document to.
3. Enter information about the document into the appropriate field text boxes.
4. Select the **Continue** button to load the form.
5. Fill out the form as required.
6. Select the proper submission button in the form to complete the process.



Creating New Documents using a PDF Form

A new document will be created and stored in the selected catalog immediately after submitting the form. When accessed inside Content Central, this new document can be modified and re-submitted to generate a new version of the document automatically.

## 8. The Coding Queue

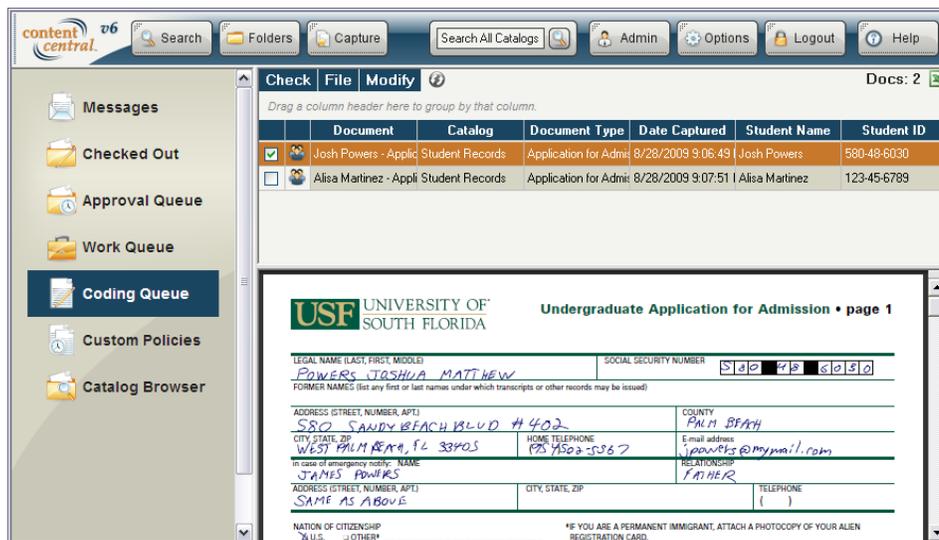
Any documents that have been captured using *Post-Capture coding* or *Versatile coding* must be fully coded before they will be routed to their appropriate storage area. The *Coding Queue* in your **Folders** frame holds these documents for you to code.

Two types of documents can exist within the *Coding Queue*. Personal documents are identified by the  icon and shared documents are identified by the  icon.

**Personal Documents** Documents captured using the *Post-capture* coding method and documents captured using the *Versatile* coding method with a *Personal Queue* destination will become personal documents. These documents will only appear to the user who captured the documents.

**Shared Documents** Documents captured using the *Versatile* coding method with a *Shared Queue* destination will become shared documents. These documents will appear to all users who have permission to add documents for the document type selected during the capture process.

Access the **Folders** frame by selecting the  button from the main menu. Select the  icon in the **Folders** frame to obtain the list of documents awaiting the coding process.



### The Coding Queue

To begin coding these documents, select the **Code Document(s)** menu item from the **Modify** menu. The **Document Properties** frame will appear on the right side of your browser. Select the catalog and document type, enter appropriate information for any fields listed, then select the  button to save changes to the properties and route the document from the queue to the catalog, or select the  button to save changes and leave the document in the *Coding Queue*. When committing the document to the catalog,

Content Central will route the file to the appropriate storage area, and the next document in the results grid will load for coding.

If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

If a **Use Filing Rules** checkbox is presented, you may choose whether or not the field information will cause the file name to change.

The screenshot shows the Content Central v6 interface. At the top, there are navigation buttons for Search, Folders, Capture, Search All Catalogs, Admin, Options, Logout, and Help. Below this is a menu bar with 'Check', 'File', and 'Modify' options, and a 'Docs: 2' indicator. A table lists two documents:

Document	Catalog	Document Type	Date Captured	Student Name	Student ID
<input checked="" type="checkbox"/> Josh Powers - Appli	Student Records	Application for Admi	8/28/2009 9:06:43	Josh Powers	580-48-6030
<input type="checkbox"/> Alisa Martinez - Appli	Student Records	Application for Admi	8/28/2009 9:07:51	Alisa Martinez	123-45-6789

Below the table is a preview of a document titled 'Undergraduate Application for Admission • page 1' from the University of South Florida. The form contains the following information:

**LEGAL NAME (LAST, FIRST, MIDDLE):** POWERS, JOSHUA, MATTHEW  
**SOCIAL SECURITY NUMBER:** 512 44 6250

**FORMER NAMES (list any first or last names under which transcripts or other records may be issued):**

**ADDRESS (STREET, NUMBER, APT):** SSC SANDY BEACH BLVD #402  
**CITY, STATE, ZIP:** WEST PALM BEACH, FL 33405  
**HOME TELEPHONE:** 925 4502-5567  
**E-mail address:** jpowerts@myaimail.com

**COUNTY:** PALM BEACH  
**RELATIONSHIP:** FATHER

**in case of emergency notify: NAME:** JAMES POWERS  
**ADDRESS (STREET, NUMBER, APT):** SAME AS ABOVE  
**CITY, STATE, ZIP:**  
**TELEPHONE:** ( )

**NATION OF CITIZENSHIP:**  
**\*IF YOU ARE A PERMANENT IMMIGRANT, ATTACH A PHOTOCOPIY OF YOUR ALIEN**

On the right side of the interface, there is a 'Document Properties' panel with dropdown menus for 'Catalog' (Student Records) and 'Document Type' (Application for Admission). It also displays the 'Student Name' (Josh Powers) and 'Student ID' (580-48-6030). There are 'Preview key-field lookup', 'Commit', and 'Update' buttons.

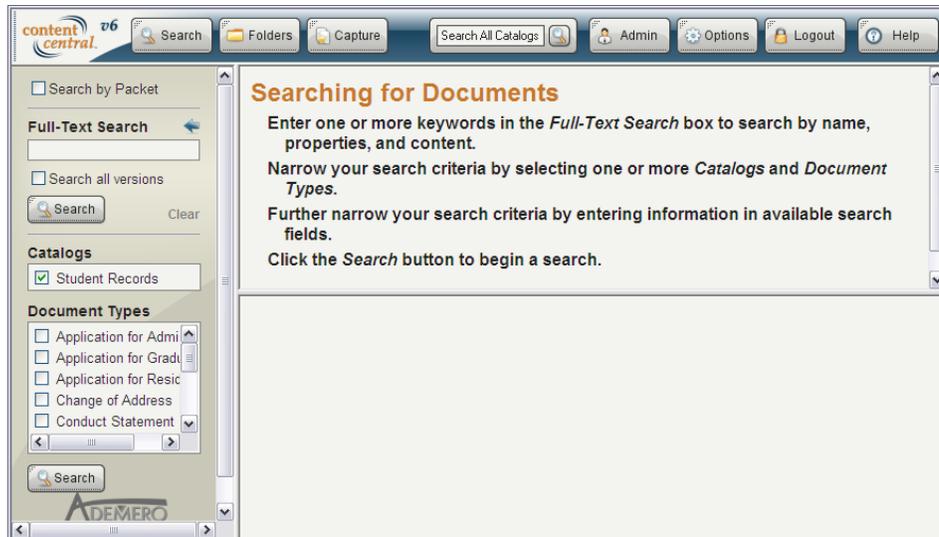
Coding Documents in the Coding Queue

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# Chapter 3. Searching for Documents

## 1. Search Procedures

A very common operation for users of a document management system is searching for documents. Search queries are performed in the left frame, results will be displayed in the upper-right frame, and documents will be displayed in the lower-right frame (for document formats having browser plugins).



The **Search** Frame

Performing a search is as simple as selecting one or more catalogs and document types, entering criteria in one or more field search textboxes, and selecting the  button. Some search boxes contain predefined choices that you can select from a list. The most efficient searches result from searching document properties such as *Name* or *Number*. These searches will narrow your results down considerably.

You can instead choose to select an existing query from the **Saved Searches** drop-down list, if available. The saved query will be entered automatically, and the search will be performed automatically if the appropriate option has been enabled. For more information, see [Section 5.5, “Saved Searches”](#).

## Searching for Documents

The screenshot shows the 'content central v6' interface. The search results table is as follows:

*DocName	*Catalog	*DocType	Student Name	Student ID
<input checked="" type="checkbox"/> Josh Powers - Application Student Records	Student Records	Application for Admission	Josh Powers	580-48-6030
<input type="checkbox"/> Josh Powers - Application Student Records	Student Records	Application for Graduation	Josh Powers	580-48-6030
<input type="checkbox"/> Josh Powers - Application Student Records	Student Records	Application for Residency	Josh Powers	580-48-6030
<input checked="" type="checkbox"/> Josh Powers - Change of Student Records	Student Records	Change of Address	Josh Powers	580-48-6030
<input type="checkbox"/> Josh Powers - Conduct Statement Student Records	Student Records	Conduct Statement	Josh Powers	580-48-6030
<input type="checkbox"/> Josh Powers - Declaration of College Student Records	Student Records	Declaration of College	Josh Powers	580-48-6030

The preview shows a document titled 'Undergraduate Application for Admission • page 1' for the University of South Florida. The student's name is Josh Powers. The form includes fields for legal name (POWERS, JOSHUA MATTHEW), social security number (512-40-2773), address (810 5th Ave #2, Hialeah, FL 33012), and contact information.

### A Document properties Search

You may also search for documents using full-text information. This can be used as the only method to search, or it can be combined with document properties. When searching for full text, every occurrence of the word or phrase you use to search will be highlighted when retrieving PDF documents. For more information on full-text searching, see [Appendix B. Advanced Search Syntax](#).

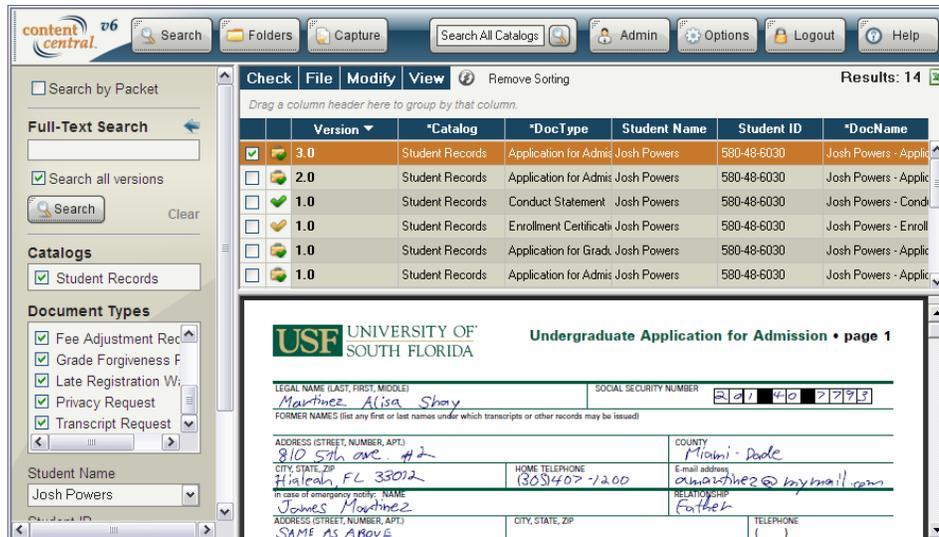
The screenshot shows the 'content central v6' interface with a full-text search for 'undergraduate'. The search results table is as follows:

*Catalog	*DocType	Student Name	Student ID	*DocName
<input checked="" type="checkbox"/> Student Records	Application for Admission	Josh Powers	580-48-6030	Josh Powers - Application
<input type="checkbox"/> Student Records	Conduct Statement	Josh Powers	580-48-6030	Josh Powers - Conduct S
<input checked="" type="checkbox"/> Student Records	Declaration of College	Josh Powers	580-48-6030	Josh Powers - Declaration
<input type="checkbox"/> Student Records	Enrollment Certification	Josh Powers	580-48-6030	Josh Powers - Enrollment
<input type="checkbox"/> Student Records	Fee Adjustment Request	Josh Powers	580-48-6030	Josh Powers - Fee Adjust
<input checked="" type="checkbox"/> Student Records	Grade Forgiveness Request	Josh Powers	580-48-6030	Josh Powers - Grade Forg

The preview shows a document titled 'Undergraduate Application for Admission • page 1' for the University of South Florida. The student's name is Alisa Shay. The form includes fields for legal name (Martinez, Alisa Shay), social security number (512-40-2773), address (810 5th Ave #2, Hialeah, FL 33012), and contact information.

### A Full-Text and Document properties Search

To search all versions of documents that match your search criteria, select the **Search all versions** checkbox.



Searching All Versions

To save your search query, select the **Save this search** checkbox, provide a **Saved-Search Title**, and select the  button. You can manage these saved searches from your options. See [Section 5.5, “Saved Searches”](#).

## 2. Searching by Packet

If one or more packet templates have been defined in the system, you will see a checkbox at the top of the search frame named, **Search by Packet**. Selecting this checkbox will present you with one or more packet templates you can search on. The key field will be displayed depending upon the packet template selected.

Enter the key-field value you are searching for, and select the  button to perform the search. All of the documents in the packet will be returned.

## 3. QuickSearch

The *QuickSearch* box in the right-center area of the main menu can be accessed from any location in Content Central. Enter your query in the *QuickSearch* box and the information provided will be used to search all document types where you have the search permission.

## 4. Saving Search Results

You may export the full list of search results, which may extend beyond the number of results displayed in the results grid, by selecting the **Save Results** menu item from the **File** menu. The data will be exported to an XML file based on the columns visible in the results grid. You will be provided with a dialog box to **Open** or **Save** the file to your local machine. Two fields, *DocFilename* and *DocPath*, will be included with each result, referencing the real filename and path to the document.

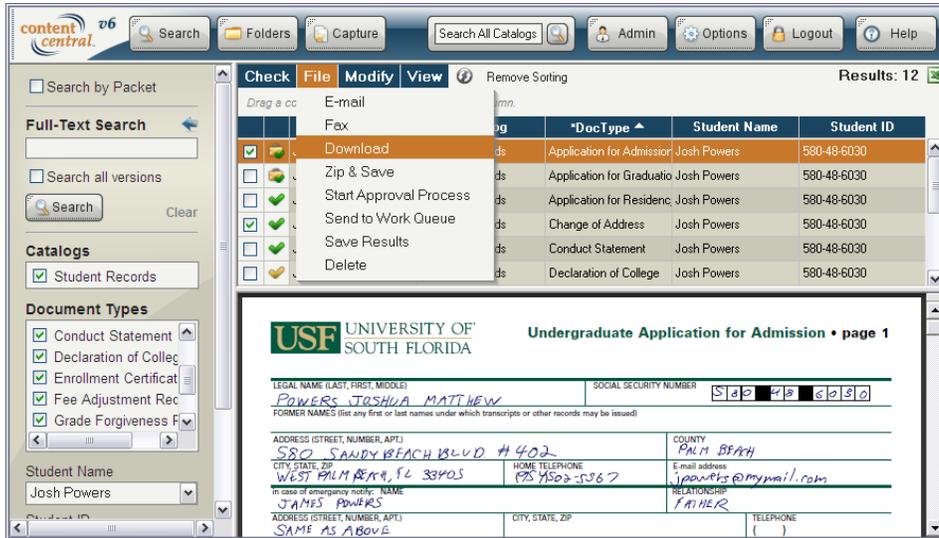


*The **Open/Save** Dialog for Search Results*

# Chapter 4. Managing Documents

## 1. Introduction

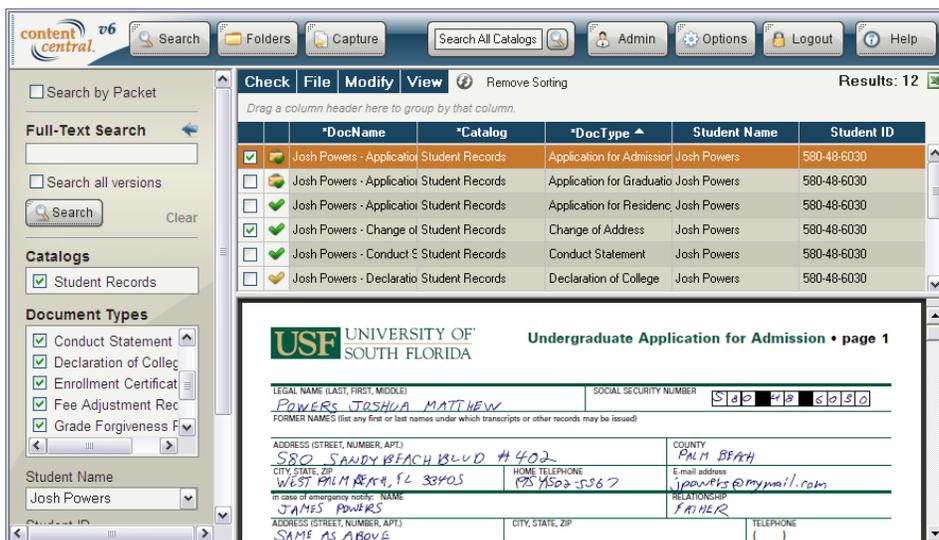
Documents can be retrieved and managed in several ways using the **File, Edit, Modify, View, and Approval Queue** menus at the top of the results-grid frame. Some of these menus may not always be available.



The File Menu

## 2. Viewing a Document in the Browser

The default behavior when selecting a row in the results grid is to open the associated document in the preview area below the results grid. To change this behavior, see [Section 5.2, "Preferences"](#).

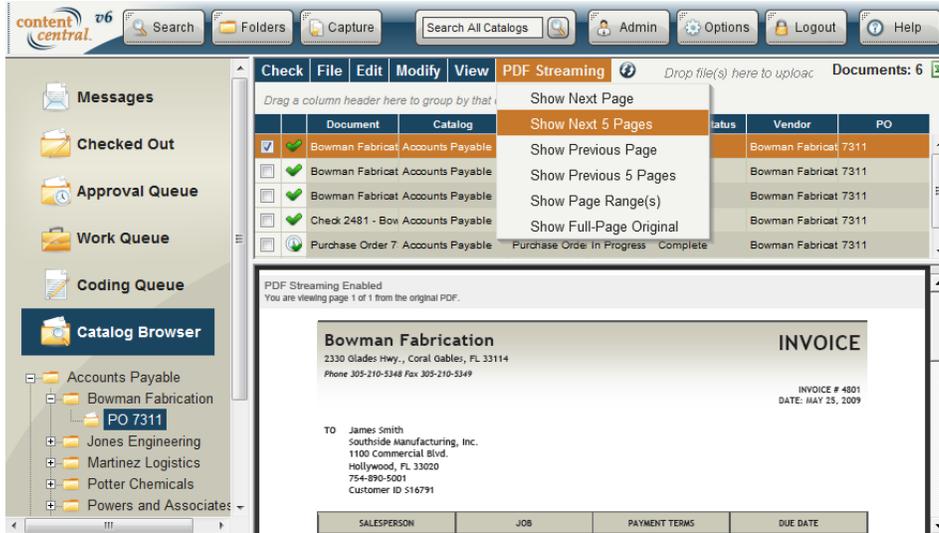


A PDF Document Viewed in the Web Browser

### 3. Streaming a PDF Document

If your administrator has enabled **PDF Streaming**, only the first page of PDF files will be sent to the preview area. The top of the image will include a watermark indicating **PDF Streaming Enabled** and the page number(s) that you are viewing from the original.

To view other pages, select one of the menu items from the **PDF Streaming** menu located above the results grid. You can move forward and backward and also select a specific range of pages to view. To download the original file in the preview area, select **Show Full-Page Original** from the menu.



Streaming a PDF Document

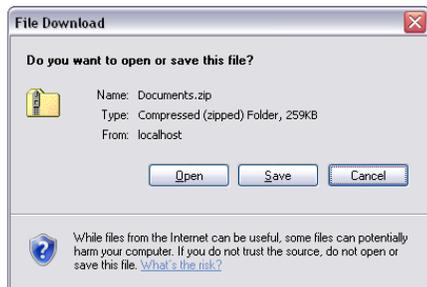
### 4. Downloading Documents

When a browser plugin doesn't exist for the document you've retrieved, you will be provided with a dialog box to **Open** or **Save** the document to your local machine. You can also access this dialog by selecting the **Download** menu item from the **File** menu.



The **Open/Save** Dialog for a Single Document

To save multiple documents, select the checkbox in each document row, and select the **Zip & Save** menu item in the **File** menu.



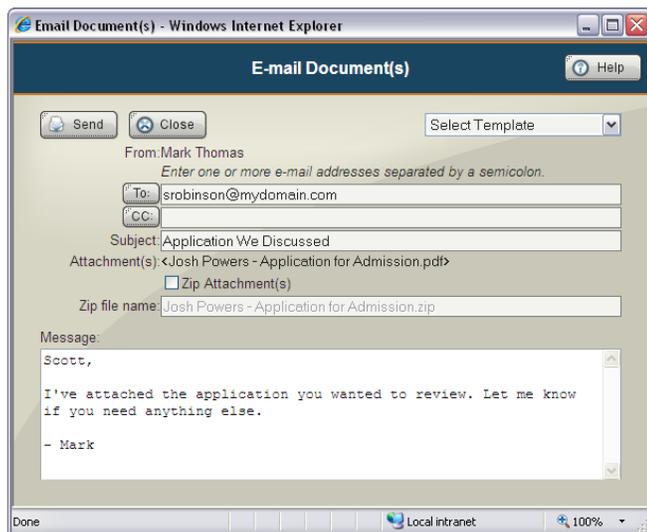
The **Open/Save** Dialog for Multiple Documents

## 5. E-mailing Documents

You may send one or more documents in the results grid to one or more e-mail recipients by selecting the **E-mail** menu item from the **File** menu. When the **E-mail Document(s)** dialog appears, you may select an available message template from the drop-down list in the top right of the dialog (if visible), or manually add the recipient(s) *E-mail Address(es)*, a *Subject* line, and an optional *Message*.

Selecting the **To:** or **CC:** buttons will load your address book. Use this list of contacts to quickly add recipients to your e-mails. After you have selected one or more recipients from the list, select the **To:** or **CC:** buttons to queue the recipients. When you are satisfied with your selections, select the  button to add them to your e-mail. For information on managing your address book, see [Section 5.4, “Address Book”](#).

When your e-mail is complete, select the  button. Recipients are automatically saved to your address book when you send an e-mail.



Sending Documents via E-mail



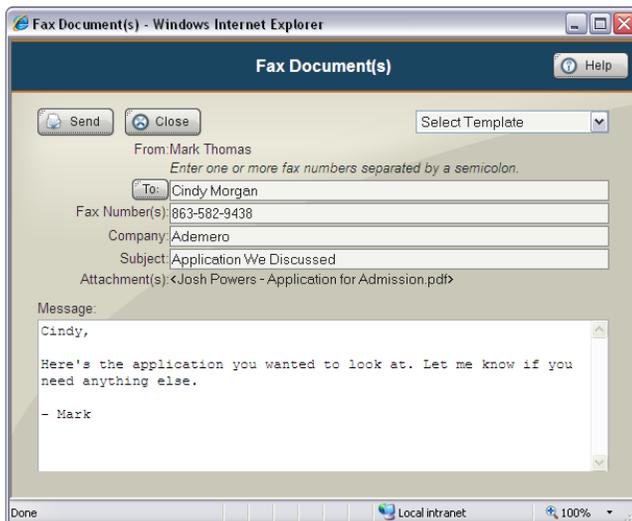
Address Book for E-mailing

## 6. Faxing Documents

You may send one or more documents in the results grid to one or more fax recipients by selecting the **Fax** menu item from the **File** menu. When the **Fax Document(s)** dialog appears, you may select an available message template from the drop-down list in the top right of the dialog (if visible), or manually add the recipient(s)' *Fax Number(s)*, an optional *Recipient Name* and *Company*, a *Subject* line, and some optional *Message Text*.

Selecting the **To:** button will load your address book. Use this list of contacts to quickly add recipients to your faxes. After you have selected one or more recipients from the list, select the **To:** button to queue the recipients. When you are satisfied with your selections, select the  button to add them to your fax. For information on managing your address book, see [Section 5.4, "Address Book"](#).

Select the  button when finished. Recipients are automatically saved to your address book when you send a fax.



Sending Documents via Fax



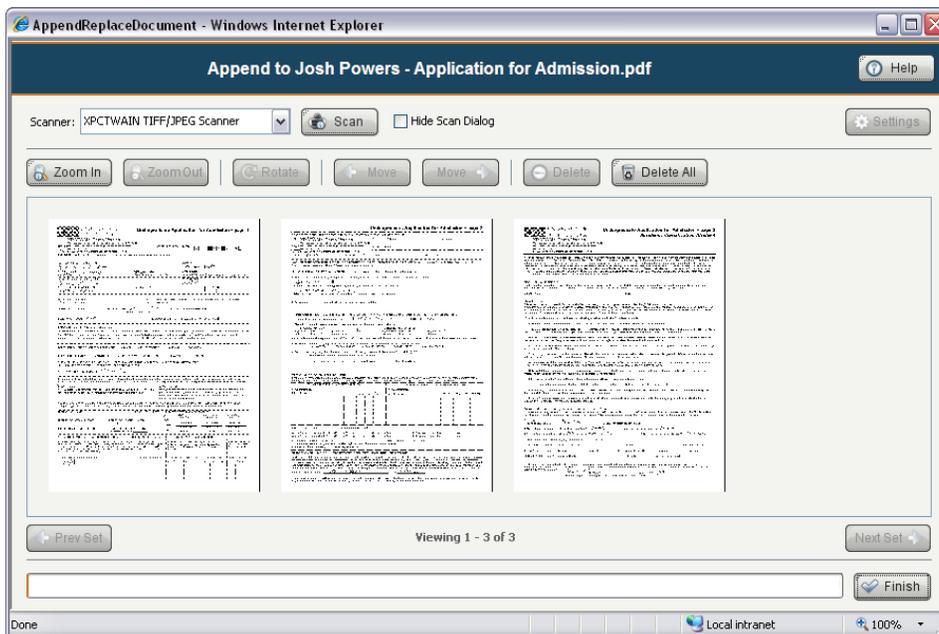
Address Book for Faxing

## 7. Appending to a Document

To append additional pages to an existing document, you will need to first locate the document. When the document is in your results grid, select the appropriate row and select the **Append** menu item from the **Modify** menu. You can append to the document using DirectScan™, QCard™, or **Electronic Upload** by selecting the appropriate menu item.

### 7.1. Appending by DirectScan™

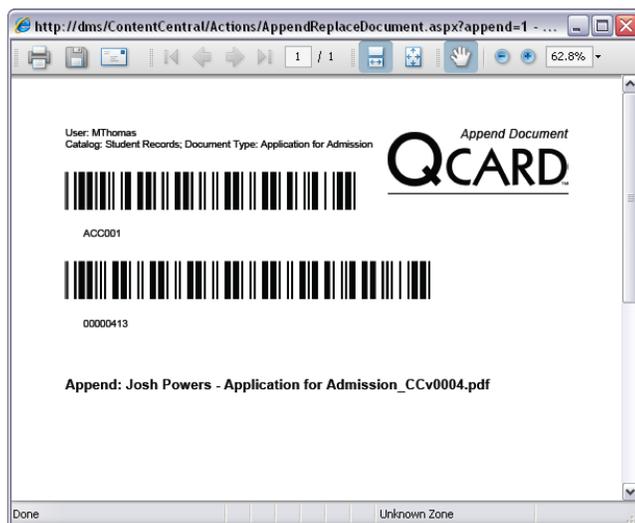
The DirectScan™ applet will launch in a new window. Use this applet to append pages to the document by scanning additional pages. For more information, see [Section 1.5, “Using The DirectScan™ Applet”](#).



Appending using DirectScan™

## 7.2. Appending by QCard™

A new window will appear containing an *Append Document* QCard™. Print this QCard™, place it on top of the additional pages, and scan the document. Content Central will create a new version of the document containing the pages from the most-recent version combined with the scanned pages.



An *Append Document* QCard™

## 7.3. Appending by Electronic Upload

When the **Append** window appears, **Browse** to the file containing the additional pages and select the  **Upload** button.



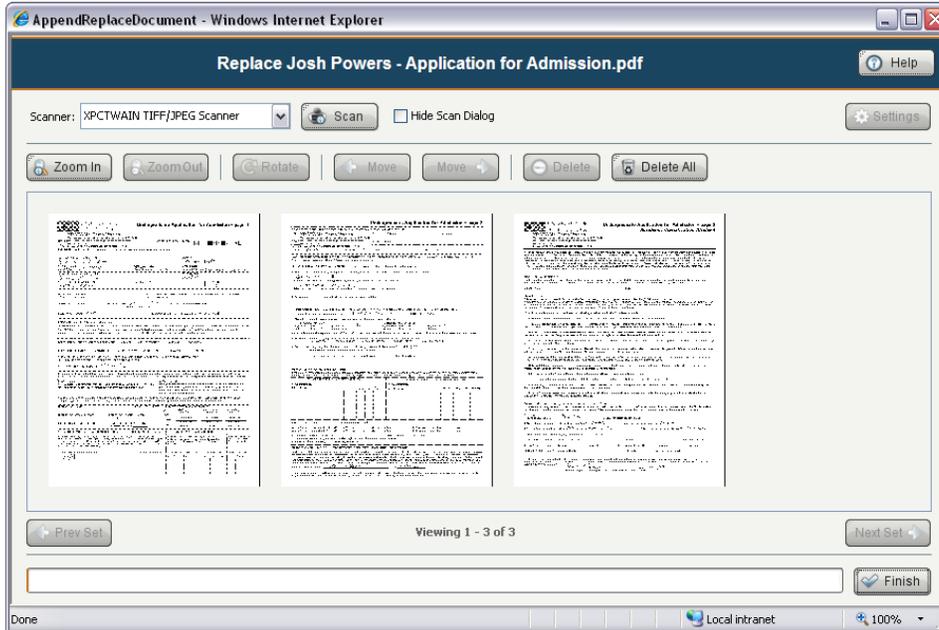
Appending using *Electronic Upload*

## 8. Replacing a Document

To replace the current version of an existing document, you will need to first locate the document. When the document is in your results grid, select the appropriate row and select the **Replace** menu item from the **Modify** menu. You can replace a document using DirectScan™, QCard™, or **Electronic Upload** by selecting the appropriate menu item.

## 8.1. Replacing by DirectScan™

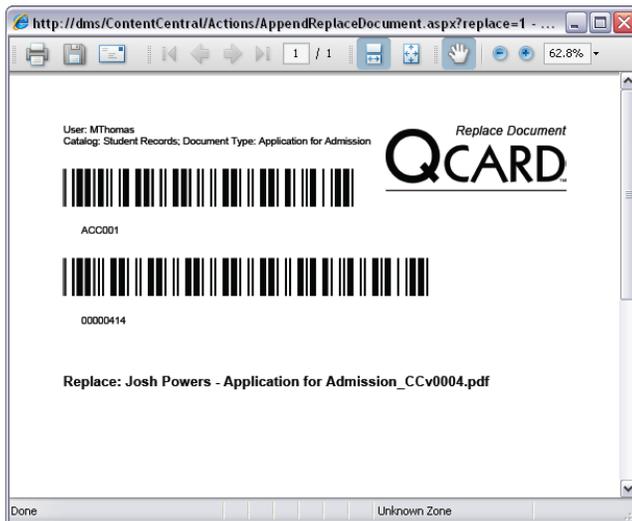
The DirectScan™ applet will launch in a new window. Use this applet to replace the document by scanning new pages. For more information, see [Section 1.5, “Using The DirectScan™ Applet”](#).



Replacing using DirectScan™

## 8.2. Replacing by QCard™

A new window will appear containing a *Replace Document* QCard™. Print this QCard™, place it on top of the new set of pages, and scan the document. Content Central will create a new version of the document containing only the pages scanned.



A Replace Document QCard™

## 8.3. Replacing by Electronic Upload

When the **Replace** window appears, **Browse** to the new file and select the  button.



Replacing using Electronic Upload

## 9. Editing Documents

Documents can be edited easily using native applications on your Microsoft® Windows® workstation. This requires the *Content Director* application installed on your local computer.

### Note

It's possible to edit documents without the *Content Director* by manually checking-out, downloading, editing, and checking-in the documents. For more information, see [Section 16, "Checking Out/Checking In Documents"](#).

The *Content Central Office Integration* application can be installed on any workstation containing Microsoft® Office® to further assist in the document capture and editing process within applications like Word®, Excel®, and Outlook®.

### Note

Both *Content Director* and *Content Central Office Integration* are client-side applications, and each must be installed on user workstations where their functionality is desired.

### 9.1. Content Director

The *Content Director* is responsible for directing documents and other content between the Content Central server and your local computer.

#### 9.1.1. Installation

The installation package for the *Content Director* application can be accessed from the **Options** area by

selecting the  button on the main menu followed by selecting the  icon for **Downloads and Installers**.

### Note

The *Content Director* application runs on only the Microsoft® Windows® platform.

Select *Download Content Central Content Director* to download and/or begin the installation package. Follow the prompts to complete the installation.

The installation package will automatically configure your computer to launch the *Content Director* each time your computer is started. This default behavior can be changed in the settings dialog.

## 9.1.2. Settings

You can access the settings of the *Content Director* by locating the icon in the system tray of your Windows® application bar and right-clicking it followed by selecting the **Settings** menu item.



*The Content Director Settings Dialog*

The **Local Document Folder** points to a location on your local computer that will temporarily store documents while they are being edited. When an edited document has been uploaded to the server, the *Content Director* will automatically remove it from this location.

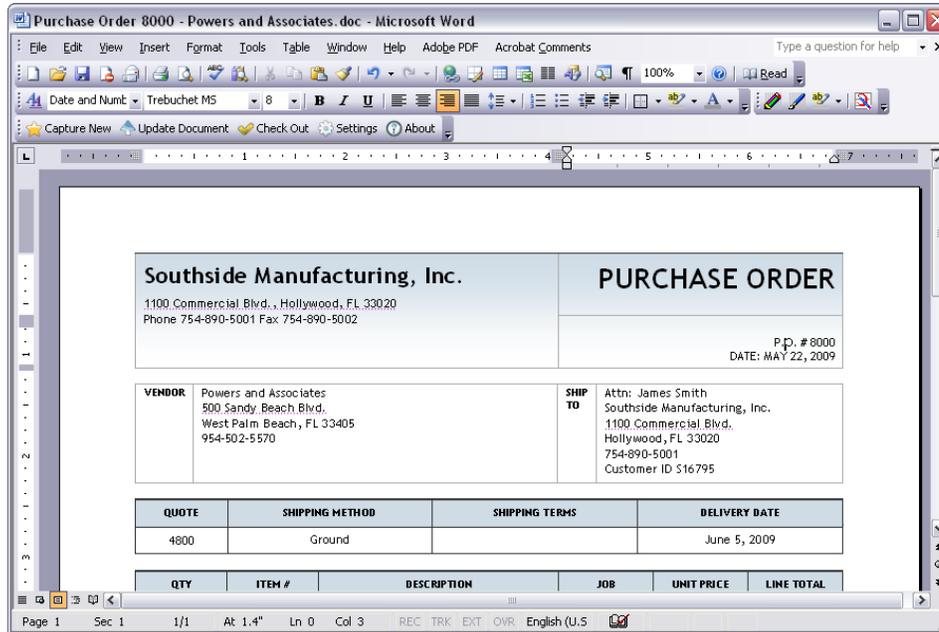
The **Port** setting determines the local Windows® port that will be used for communication to and from the server.

You may select the checkbox labeled **Do not show informational balloon tips** if you do not wish to see notices of downloads and uploads. You may also choose whether the application will automatically **Check for updates** and **Run at Windows startup**.

When you have finished making changes, select the **OK** button to close the settings dialog.

## 9.2. Content Central Office Integration

The *Content Central Office Integration* application (*CCOI*) integrates with your implementation of Office® 2003, 2007, 2010 32-bit, or 2010 64-bit in the form of a custom toolbar that communicates with the Content Central server.



CCOI in Word® 2003

## 9.2.1. Settings

You can access *CCOI* settings by clicking the **Settings** button on the *CCOI* toolbar within your Office® application. This should be accessed the first time *CCOI* is used.

### Service Locations

*CCOI* connects to the Content Central server using Web services. The service locations can be entered in one of two ways.

#### Auto Discover Service URLs

In most cases, you can provide the URL to Content Central (example: <http://servername/ContentCentral>) and *CCOI* will automatically determine the service locations.

#### Manually Configure Services

The services may need to be entered manually if the server configuration has been customized.

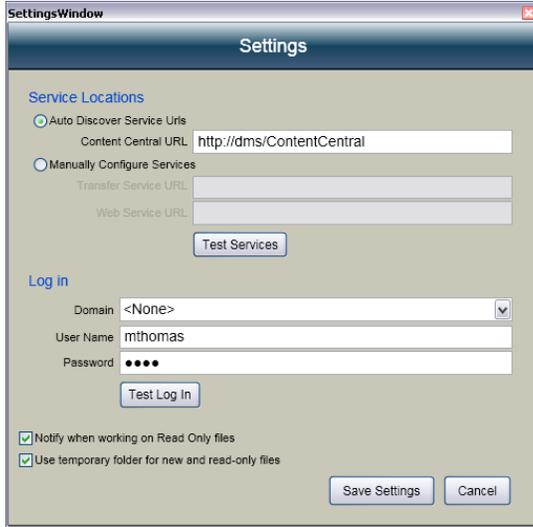
Select the **Test Services** button to verify the service locations entered are valid.

### Log in

You must provide your Content Central login information for *CCOI* to authenticate with the Content Central server. Select the **Test Log In** button to verify these entries.

You may select the checkbox labeled **Notify when working on Read Only files** if you wish to see notices when opening a document that cannot be edited. You may also choose whether the application will **Use temporary folder for new and read only files**. When this option is checked, the application will automatically save new documents to a temporary folder prior to uploading them to Content Central. These files will be automatically deleted when the application is closed.

When you have finished making changes, select the **Save Settings** button to save the settings and close the dialog.



CCOI Settings Dialog

## 9.2.2. Capturing New Documents

You can capture any Office® document that has not been previously captured by selecting the **Capture New** button on the toolbar. The **Check-In** dialog will launch, allowing you to choose the appropriate destination and document properties for the document.

### Note

To capture e-mails using Outlook®, select the **Capture emails to Content Central** menu item from the **Content Central** menu.

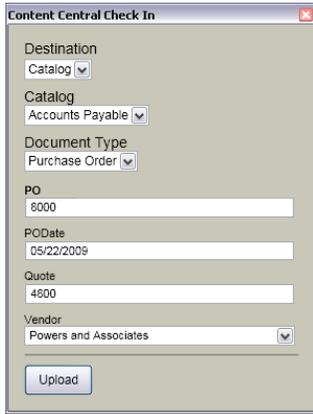
Destination	This selection determines whether the document will be sent directly to a <b>Catalog</b> or to the <i>Coding Queue</i> for review.	
	Catalog	The document will be routed to the selected <b>Catalog</b> . Any required document properties must be provided before you can <b>Upload</b> . These document properties are indicated with bold text.
	Personal Coding Queue	The document will be routed to the <i>Coding Queue</i> , visible only to you.
	Shared Coding Queue	The document will be routed to the <i>Coding Queue</i> , visible to you and others with permission to add documents for the document type selected.
Catalog and Document Type	Select an appropriate <b>Catalog</b> and <b>Document Type</b> for the document. These selections can be changed later in the <i>Coding</i>	

*Queue* when the **Destination** is set to **Personal Coding Queue** or **Shared Coding Queue**.

Document Properties

Enter appropriate document properties for the document. Any required fields are indicated with bold text. All fields are optional when the **Destination** is set to **Personal Coding Queue** or **Shared Coding Queue**.

When all selections have been made, select the **Upload** button to route the document to the Content Central server. You will be prompted to save the file locally if it has not been saved and you have not chosen to use a temporary folder (see [Section 9.2.1, “Settings”](#)).



CCOI Check-In Dialog

### 9.2.3. Checking Out a Local Document

If you've loaded an Office® document outside of the Content Central Web application and the document has been previously added to Content Central, you can check out the document by selecting the **Check Out** button on the *CCOI* toolbar. This will notify other users in Content Central that you are editing the document.

## 9.3. Editing a Document

To edit a document, select the results-grid row of a document to modify followed by the **Edit Document** menu item from the **Modify** menu. The document will be checked-out from the system automatically and routed to your local machine via the *Content Director*. Once the file has been downloaded, its native application will launch and load the document.

After modifications have been completed, the document needs to be uploaded to the document server.

## 9.4. Uploading Changes using *CCOI*

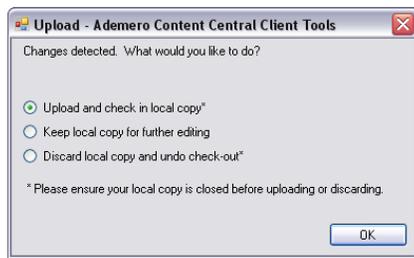
Use this method of uploading if your document is a Microsoft® Office® document and you have installed *CCOI*.

After making necessary changes to the document, select the **Update Document** button on the *CCOI* toolbar. The new version will be uploaded, and the document will be checked in if previously checked out.

## 9.5. Uploading Changes without using CCOI

After making necessary changes to the document, close the application, making sure to choose **Yes** when asked if you would like to save the changes. The *Content Director* will provide a dialog allowing you to choose your preferred action.

Select the appropriate action, and select the **OK** button to complete the editing process. If you have chosen to upload the local copy, the *Content Director* will send the modified document to the server and perform an automatic check in.



*The Content Director Upload Dialog*

## 10. Editing Document Properties

If you would like to view or modify document properties for a document, select the results-grid row of a document to modify followed by the **Document Properties** menu item from the **Modify** menu. Your left frame will disappear and the right frame containing the **Document Properties** will appear.

If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

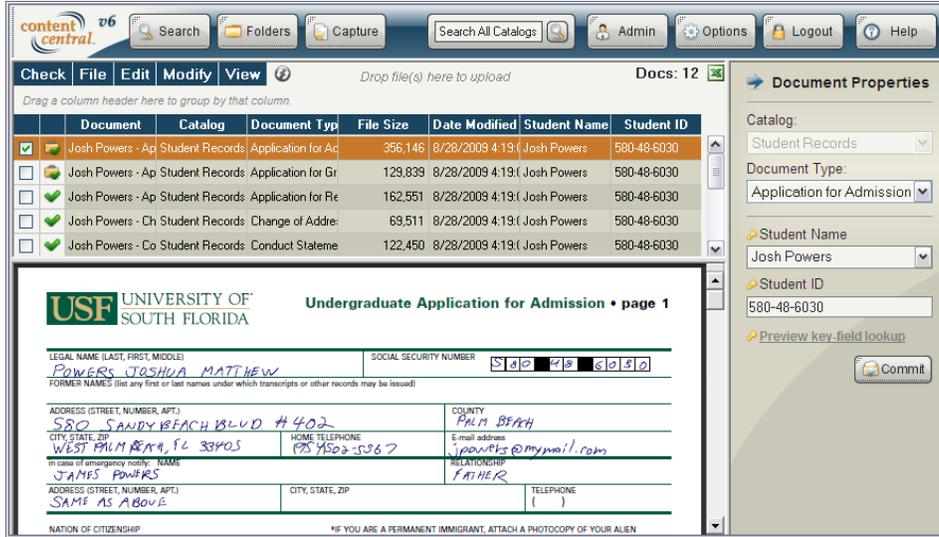
If a **Use Filing Rules** checkbox is presented, you may choose whether or not the updated field information will cause the document folder and file name to also update.

When changing the document type, you will not be able to modify the fields until the document has moved.

Make the necessary changes to the document properties and then click  when finished.

### **Note**

System fields appear below the  button and are presented for informational purposes only.



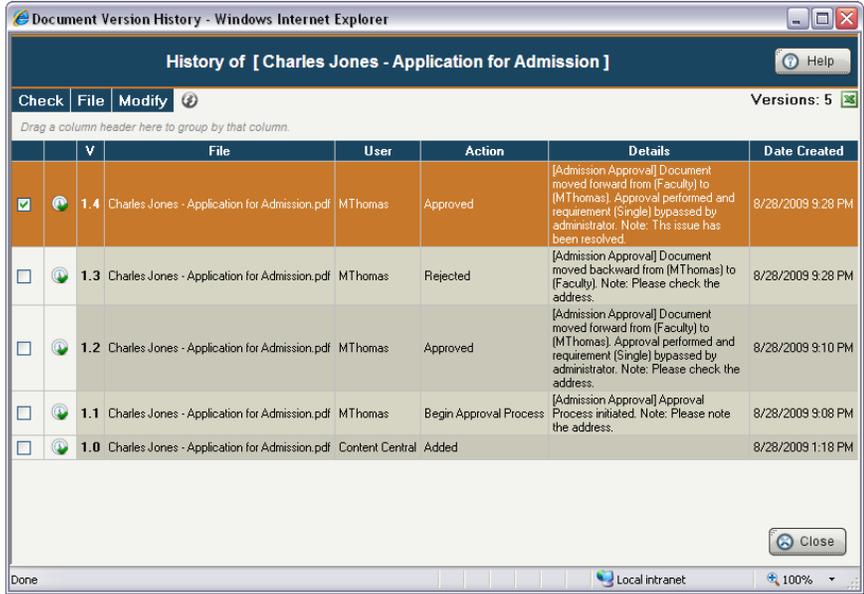
The Document Properties Frame

## 11. Viewing Document Version History

Content Central keeps track of document revisions and changes. The current version of a document will always be displayed in results grids. To view all versions of a document, select the **Document History** menu item from the **View** menu.

The number to the left of the decimal is the *Major Version*. The number to the right of the decimal is the *Minor Version*. The following table outlines how versions are generated.

Major Version	<ul style="list-style-type: none"> <li>Added</li> <li>Added as Copy</li> <li>Moved</li> <li>Checked In</li> <li>Appended</li> <li>Replaced</li> <li>Uploaded Revision</li> </ul>
Minor Version	<ul style="list-style-type: none"> <li>Properties Updated</li> <li>Begin Approval Process</li> <li>Approved</li> <li>Voted for Approval</li> <li>Rejected</li> <li>End Approval Process</li> <li>Set Priority</li> <li>Added/Updated Retention Policy</li> <li>Removed Retention Policy</li> </ul>

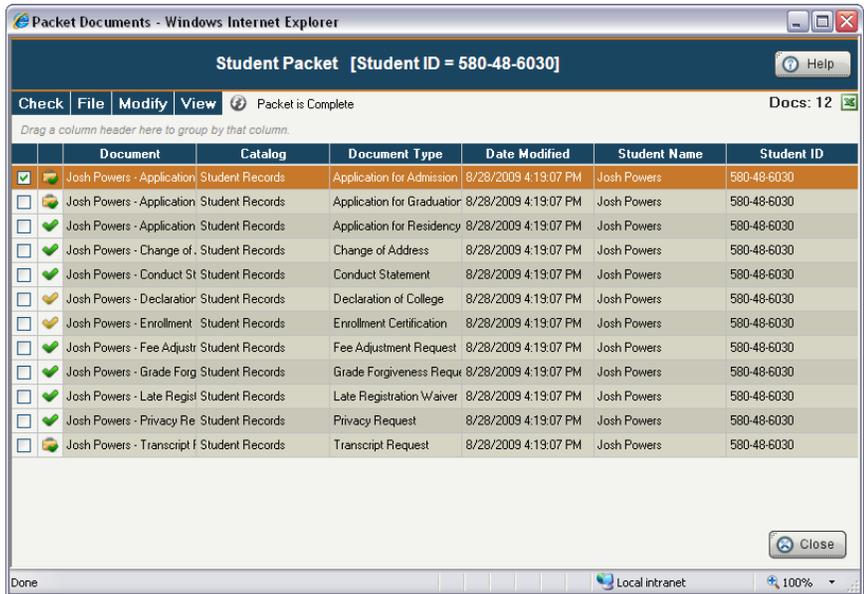


Viewing Document Version History

## 12. Viewing a Packet

Packets are collections of documents that share a key-field value. One or more packet templates can be defined by your administrator and used to link these related documents together in a packet. To view other documents linked to the currently selected document, select the **Packet** menu item from the **View** menu. When more than one packet exists for the source document, you can choose the packet to view by selecting the appropriate packet template from the drop-down menu in the header.

An informational message appears to the right of the menu indicating whether the packet is **Complete** or **Incomplete**. When a packet is incomplete, rows representing the missing document types will appear at the end of the current page of packet documents.

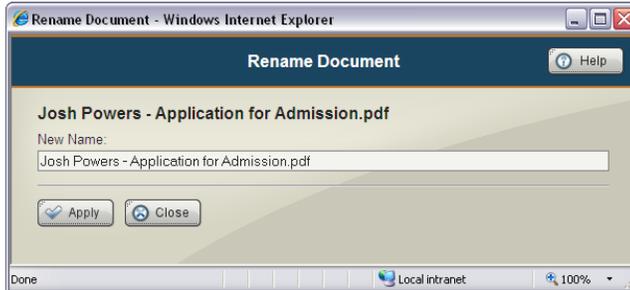


Viewing a Packet

## 13. Renaming a Document File Name

To rename a document file name, select the **Rename** menu item from the **Modify** menu.

Provide a **New Name** for the file. Select the  button to rename the file.



*Renaming Documents*

## 14. Deleting Documents

To delete one or more documents in your results grid, add a check to each row of the documents you would like to delete. When deleting only one document in your results grid, select that row.

### Note

If you wish to delete multiple documents and the selected row does not contain a check in its checkbox, Content Central will only delete that selected row's document.

Once you've selected and/or checked the appropriate row(s), select the **Delete** menu item from the **Document Actions** menu. The **Delete Document(s)** dialog will appear.

Review your selections, then select the  button if you wish to continue. The documents will be removed from the system and the **Delete Document(s)** dialog will close.

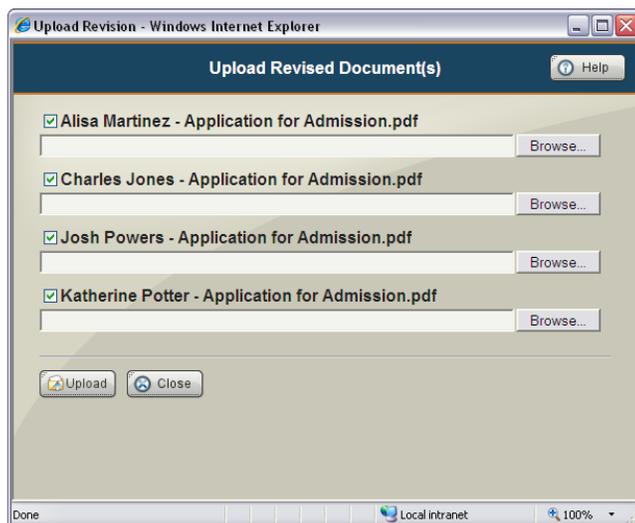


*Deleting Multiple Documents*

## 15. Uploading Revisions

To upload a revision, select the **Upload Revision** menu item from the **Modify** menu.

**Browse** to the local file for each document you want to upload as a revision. After choosing your files, select the  button to begin the upload process. A new version will be created for each uploaded document.



*Uploading Revised Documents*

## 16. Checking Out/Checking In Documents

### 16.1. Checking Out Documents

When you need to make changes to the content of one or more documents in your results grid, add a check to each row of the documents you would like to check out. When checking out only one document in your results grid, select that row.

#### **Note**

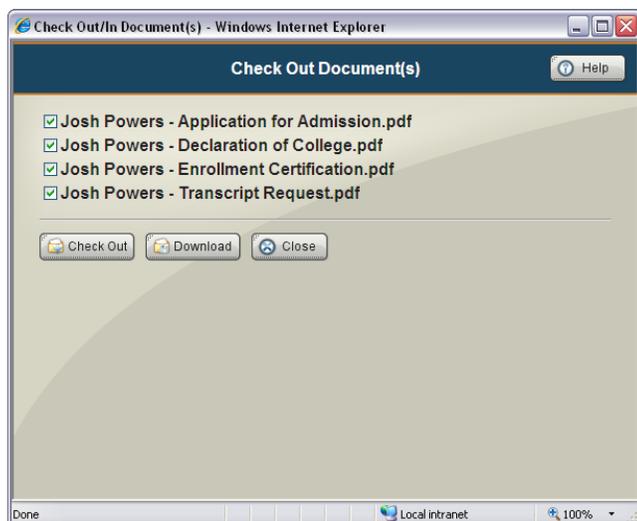
If you wish to check out multiple documents and the selected row does not contain a check in its checkbox, Content Central will only check out that selected row's document.

Once you've selected and/or checked the appropriate row(s), select the **Check Out/In** menu item from the **Modify** menu. The **Check Out/In Document(s)** dialog will appear.

Review your selections, then select the  or  button if you are satisfied. The **Check Out/In Document(s)** dialog will reload and those documents that were checked out will allow you to  the documents or  the check out process.

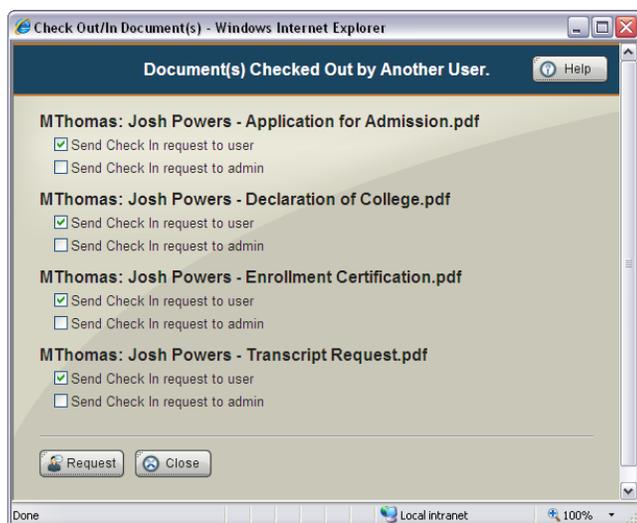
#### **Note**

Multiple documents will be compressed into a ZIP file for download.



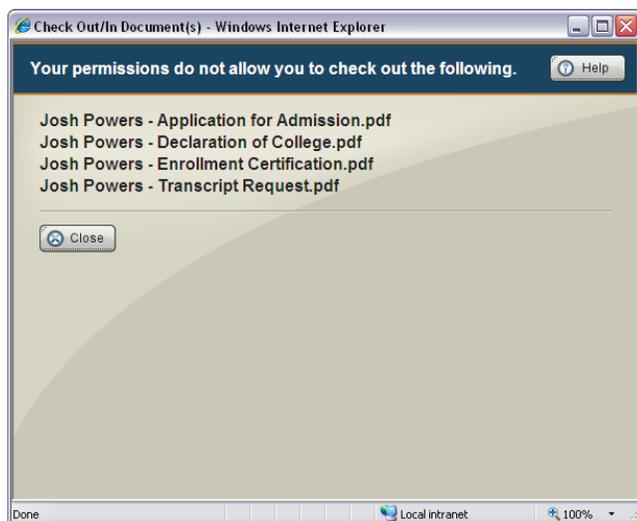
### *Checking Out Multiple Documents*

If any of the documents you selected for check-out were already checked out by another user, you may request that those documents be checked in. You can send a notice to both the user and administrators.



### *Requesting Documents to be Checked In*

If you do not have permission to check out any of the selected documents, you will receive a message listing those documents. You will not be able to check out those documents.

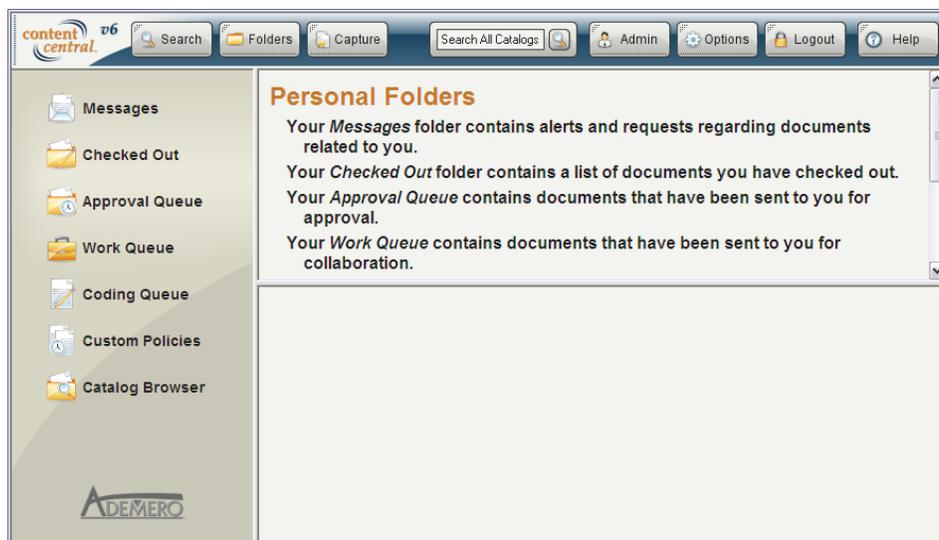


Attempting to Check Out Documents Without Permission

## 16.2. Checking In Documents

After you've finished modifying documents, you may upload the new file(s) back to Content Central. The easiest way to accomplish this is by accessing these checked-out documents from your **Folders** frame.

Access the **Folders** frame by selecting the  button from the main menu.



The **Folders** Frame

Select the  icon in the **Folders** frame to obtain the list of documents you currently have checked out.



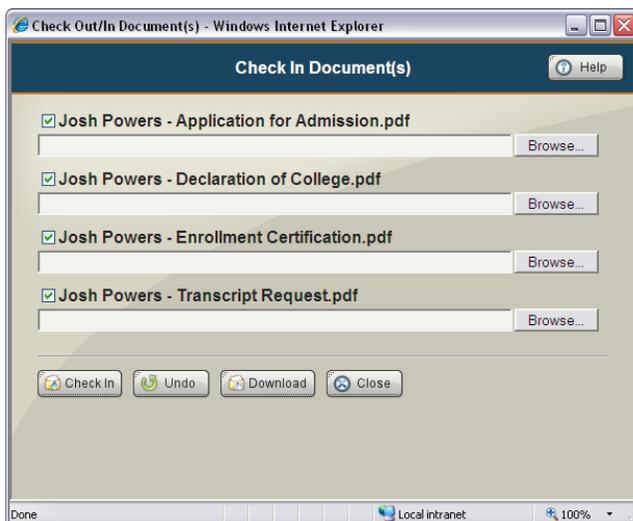
*The Checked Out Document List*

Just as before when checking out documents, add a check to each row of the documents you would like to check in. When checking in only one document in your results grid, select that row.

Once you've selected and/or checked the appropriate row(s), select the **Check Out/In** menu item from the **Modify** menu. The **Check Out/In Document(s)** dialog will appear.

Review your selection(s), then browse to each document location on your local machine.

Select the  **Check In** button when you are ready to upload the modified documents. The **Check Out/In Document(s)** dialog will reload after uploading completes, and those documents that were checked in will now be allowed for check-out once more. If you are finished, close the **Check Out/In Document(s)** dialog.



*Checking In Multiple Documents*

# 17. The Approval Queue [*Enterprise Edition*]

Your **Approval Queue** contains documents or packets that have been routed to you based on an approval process. Access it by first selecting the  button from the main menu followed by the  icon from the **Folders** frame.

Icons displayed in the *Approval Queue* are as follows:

-  Document or packet is a new arrival to the approval process.
-  Document or packet has been approved.
-  Document or packet has been rejected.

To narrow your view by catalog or document type, select from the drop-down list at the top of the results frame.

After you've performed your designated task(s) related to a document or packet, you can either **Approve** it or **Reject** it from the **Approval Queue** menu. One or more documents and packets can be approved or rejected at the same time.

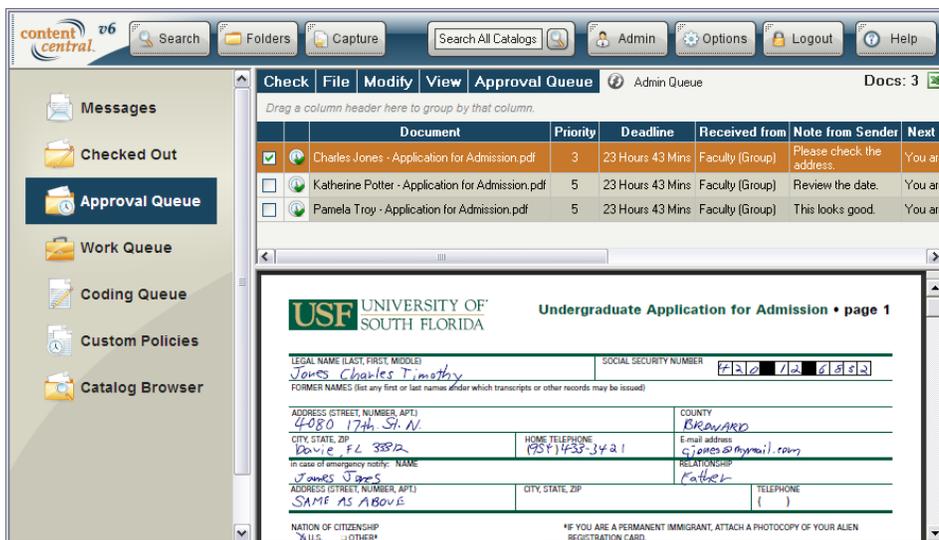
 **Note**

You may be able to select only the first item in the queue. This is an administrator preference.

If you have permission to set priorities, you may select the **Set Priority** menu item from the **Approval Queue** menu.

Most documents or packets arrive on an approval process because they match certain criteria during the capture process or match criteria in a workflow rule; however, it's sometimes necessary to manually place an existing document or packet on an approval process. To accomplish this, select one or more documents or packets from your results grid, and then select the **Start Approval Process** menu item from the **File** menu.

When you are viewing a packet, you may choose the **Start Packet Approval Process** menu item from the **File** menu to assign the packet to an approval process.



*The Approval Queue*

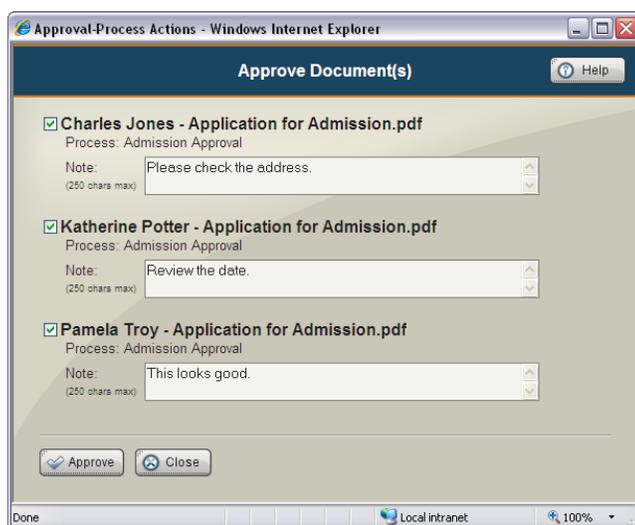
## 17.1. Approving

You can provide a note for the next user or completion of the process for each item you are approving.

If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

If you are presented with a **PIN Required** message, you must provide your personal identification number, which can be defined in your options. See [Section 5.8, “PIN”](#) for more information.

Confirm your selections and select the  button to move the item(s) forward on the approval process. The item(s) will be removed from your *Approval Queue*.



*Approving*

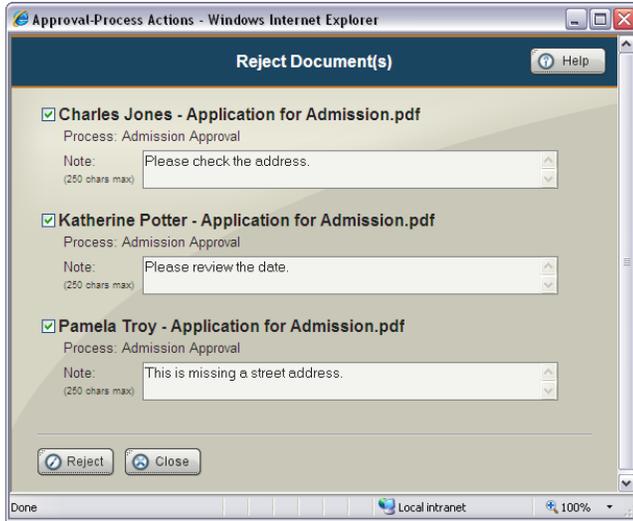
## 17.2. Rejecting

You can provide a note for the previous user or completion of the process for each item you are rejecting.

If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

If you are presented with a **PIN Required** message, you must provide your personal identification number, which can be defined in your options. See [Section 5.8, “PIN”](#) for more information.

Confirm your selections and select the  button to send the item(s) backward on the approval process. The item(s) will be removed from your *Approval Queue*.



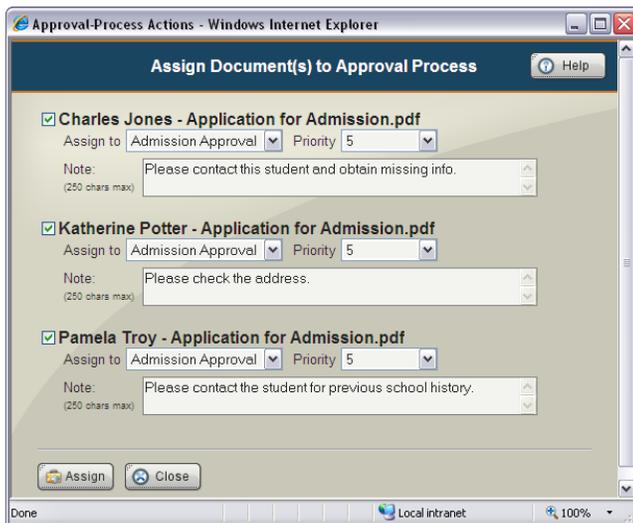
Rejecting

### 17.3. Assigning to an Approval Process

If one or more items to assign are the primary document type for one or more packets, you may choose whether the **Assignment Type** is for only the **Document** or for the entire **Packet**. If the **Packet** option is selected, choose a packet from the accompanying list. You can select the **View Packet** link to view all documents in the selected packet.

Select the appropriate approval process for each document you've chosen for assignment. You may optionally set the priority for the item and provide a note for the first member in the approval process. If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

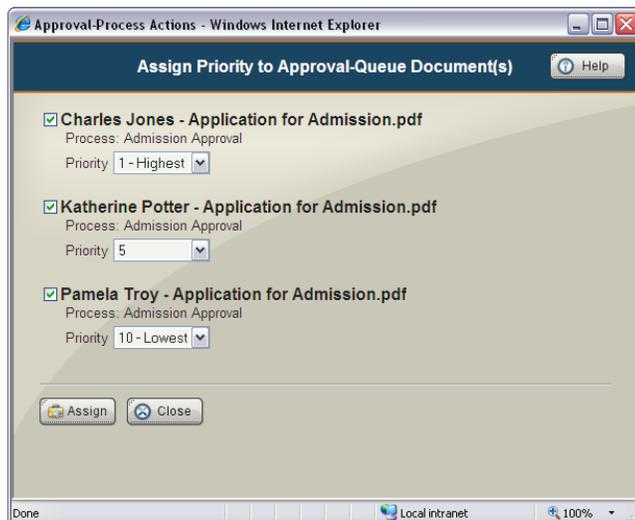
After confirming your selections, select the  **Assign** button. The item(s) will be placed on the respective approval process.



Assigning to an Approval Process

## 17.4. Setting Priorities

Select the appropriate priority for each item listed. After confirming your selections, select the  button. The item(s)' priority will be updated.



Setting Priorities

## 17.5. The Admin Queue [Administrators]

The Admin *Approval Queue* provides a view of all items on all approval processes for document types you can administer. As an administrator you can approve, reject, or set priority on any of the items listed. You can also remove any of the items from their approval process using the **Remove from process** menu item on the **Approval Queue** menu.

To enter this view select the **Admin Queue** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

To return to your personal *Approval Queue*, select the **My Queue** link.

## 17.6. History [Administrators]

The History area provides a view of items that have been previously approved, rejected, or removed from approval processes of all document types you can administer.

To enter this view select the **History** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

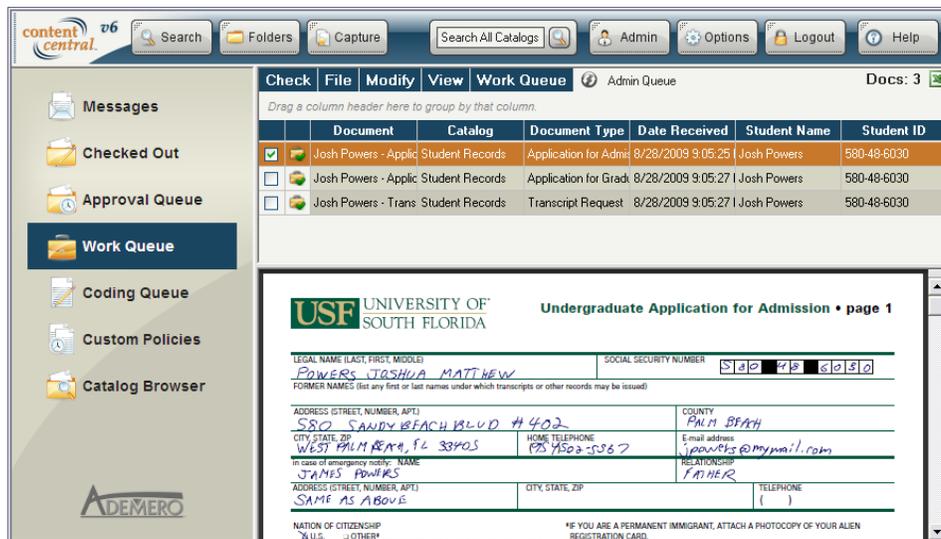
To return to your personal *Approval Queue*, select the **My Queue** link.

## 18. The Work Queue [*Enterprise Edition*]

Your **Work Queue** contains documents that have been routed to you on an ad hoc basis. Access it by first selecting the  button from the main menu followed by the  icon from the **Folders** frame.

To narrow your view by catalog or document type, select from the drop-down list at the top of the results frame.

After you've performed your designated task(s) related to a document, you can either **Move** it or **Remove** it using the **Work Queue** menu. One or more documents can be moved or removed at the same time.



The Work Queue

## 18.1. Assigning or Moving Documents to a Work Queue

To *assign* one or more documents to one or more users or groups, select one or more documents from your results grid, and then select the **Send to Work Queue** menu item from the **File** menu.

### Note

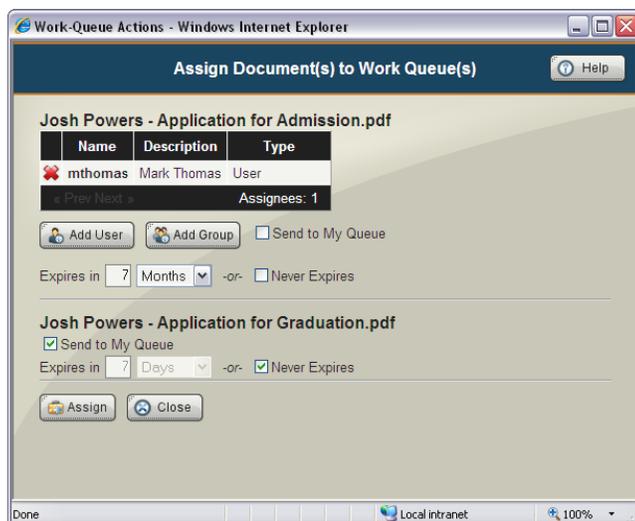
When assigning a document to a *Work Queue* from the *Work Queue*, select the **Copy to Queue** menu item from the **Work Queue** menu instead.

To *move* documents from your *Work Queue* to another user or group, select the **Move to Queue** menu item from the **Work Queue** menu.

Documents are grouped by document type. You can choose one or more users or groups to assign each document group if your administrator has provided you with permission to assign to other users and groups. Selecting the **Send to My Queue** checkbox will send the document group to *only* your *Work Queue*.

You can choose to set an expiration on the selected documents. Each expired document will be automatically removed from the *Work Queue*. You may be limited on how long a document can exist in the *Work Queue*.

After confirming your selections, select the  **Assign** button. The documents will be sent to the user(s) and/or group(s) selected. When *moving* one or more documents, the documents will be removed from your *Work Queue*.



Assigning Documents to the Work Queue

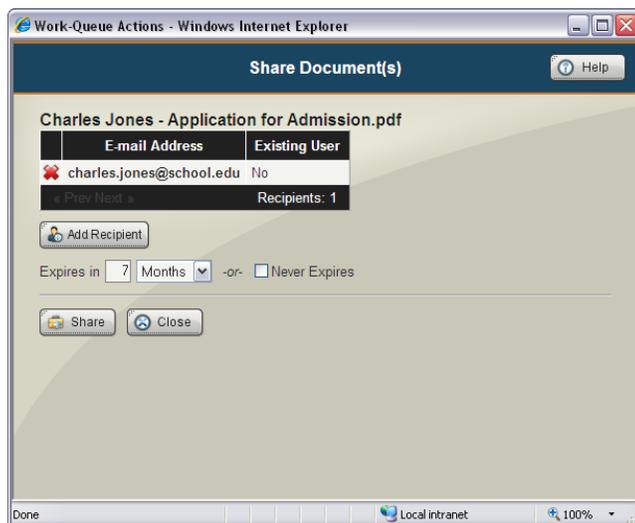
## 18.2. Sharing Documents

To *share* documents with guests or users, select one or more documents from your results grid, and then select the **Share** menu item from the **File** menu.

Select the  button to add one or more recipients by e-mail address. While adding recipients, you can select the *Address Book* link to access existing e-mail addresses. When providing more than one e-mail address at a time, separate each with a semicolon.

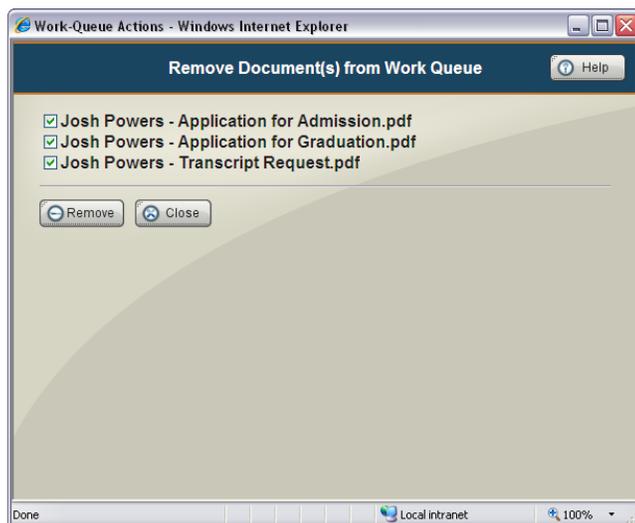
You can choose to set an expiration on the selected documents. Each expired document will be automatically removed from the *Work Queue*. You may be limited on how long a document can exist in the *Work Queue*.

After confirming your selections, select the  button. The documents will be sent to the recipient(s) selected. If any of the recipients do not exist in the system, a new guest user will be created, and an invitation containing login details will be sent to the e-mail address provided.



## 18.3. Removing Documents

To remove one or more documents from your *Work Queue*, select the appropriate documents in your results grid followed by the **Remove from Queue** menu item from the **Work Queue** menu. Confirm your selections and select the  button. The documents will be removed from your *Work Queue*.



Removing Documents from the Work Queue

## 18.4. The Admin Queue [Administrators]

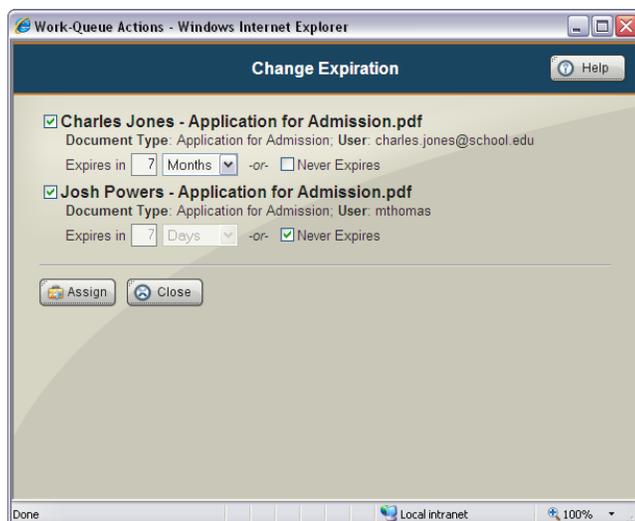
The Admin *Work Queue* provides a view of all documents in each user's *Work Queue* for document types you can administer. As an administrator you can assign or remove any of the documents listed.

To enter this view select the **Admin Queue** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

To return to your personal *Work Queue*, select the **My Queue** link.

## 18.5. Changing Expirations

To change the expiration of one or more documents in the Admin *Work Queue*, select the appropriate documents in your results grid followed by the **Set Expiration** menu item from the **Work Queue** menu. You may be limited on how long a document can exist in the *Work Queue*. Confirm your selections and select the  button. The new expirations will be set on the selected documents.



Changing Expirations of Documents in the Admin Work Queue

## 19. Custom Retention Policies [*Enterprise Edition*]

The **Custom Policies** folder contains documents having retention policies differing from the document-type retention policy. Access it by first selecting the  button from the main menu followed by selecting the  icon from the **Folders** frame.



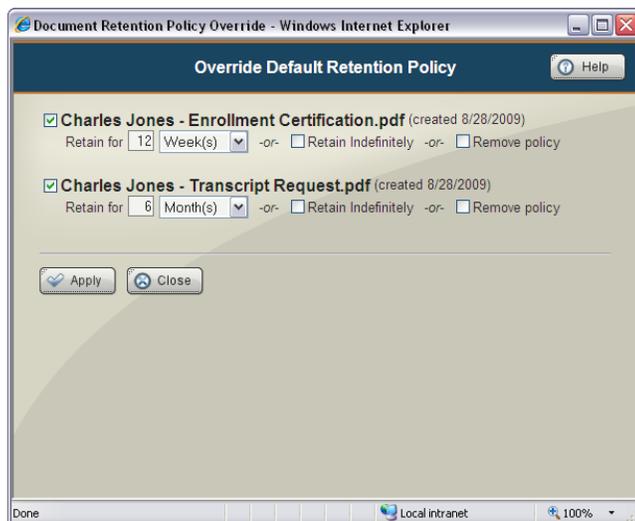
The **Custom Policies** Folder

### 19.1. Defining Custom Retention Policies

To override the default retention policy for one or more documents, select the **Set Retention Policy** menu item from the **Modify** menu.

First, choose the length of time each document should be retained in the catalog. You can alternatively select the **Retain Indefinitely** checkbox to prevent the document from being removed at any time. To remove a custom retention policy, select the **Remove policy** checkbox.

Select the  button to save your changes.



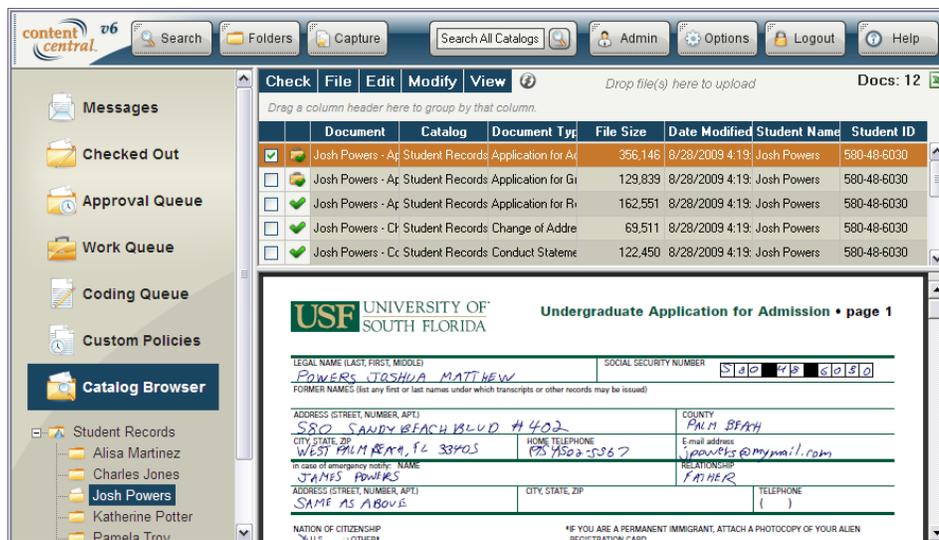
*Defining Custom Retention Policies*

## 20. The Catalog Browser

The **Catalog Browser** within the **Folders** frame displays documents as they appear on the file system.

Access the **Folders** frame by selecting the  button from the main menu. Select the  icon in the left frame to display the browser tree.

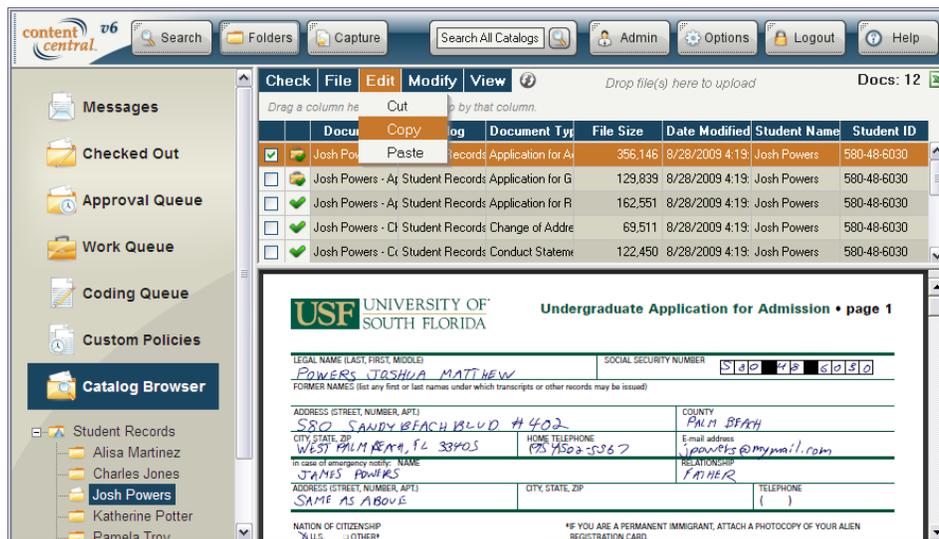
Files within the selected folder will appear in the results grid, and document actions may be performed on one or more selected documents. Navigate the browser tree by selecting the expand (+) and collapse (-) icons. If your administrator has enabled paging, you may see an additional row indicating the current page number of subfolders along with **Prev** and **Next** controls to navigate through the subfolder list. You can also enter a number in the empty textbox to advance to a specific page of subfolders.



Browsing Files Within a catalog

## 20.1. Cut, Copy, & Paste

The **Edit** menu can be used to **Cut & Paste** or **Copy & Paste** selected documents in the results grid from one folder to another.



The **Edit** Menu

### 20.1.1. Cut & Paste (Move)

1. Select one or more documents from the results grid displaying the items to cut.
2. Select the **Cut** menu item from the **Edit** menu.
3. Select the new folder to move the documents into.
4. Select the **Paste** menu item from the **Edit** menu.

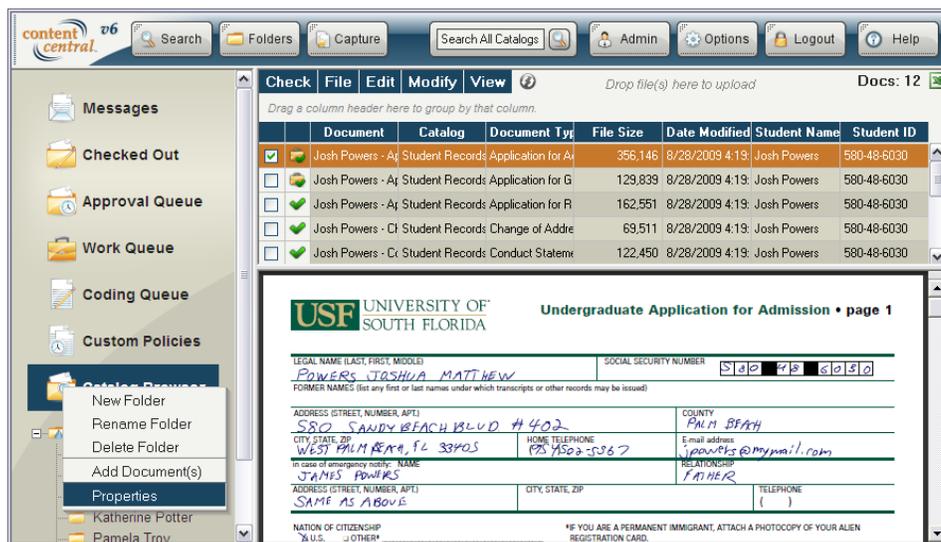
## 20.1.2. Copy & Paste (Copy)

1. Select one or more documents from the results grid displaying the items to copy.
2. Select the **Copy** menu item from the **Edit** menu.
3. Select the new folder to copy the documents into.
4. Select the **Paste** menu item from the **Edit** menu.

## 20.2. The Context Menu

Access the context menu by right-clicking any folder in the **Catalog Browser** tree in the left frame. The following operations can be performed using the context menu:

- New Folder** Creates a subfolder within the selected folder. After selecting this menu item, you need to enter a name for the new folder.
- Rename Folder** Allows you to rename the selected folder. After selecting this menu item, you need to enter the new name for the existing folder.
- Delete Folder** Removes the selected folder from the selected catalog. The folder must be empty.
- Add Document(s)** Loads the **Drag & Drop Upload** applet to upload new documents or other content. For more information, see [Section 6.2.1, “Using the Context Menu or File Menu”](#).
- Properties (Administrators)** Allows the folder selected to be assigned to a specific document type. For more information, see [Section 20.3, “Assigning Document Types to Folders \[Administrators\]”](#).



The Context Menu

## 20.3. Assigning Document Types to Folders [Administrators]

The **Folder Properties** dialog allows administrators to assign a document type to the folder selected.

If the **Inherit Settings** checkbox is selected, the selected folder will use the settings of its parent.

To assign a document type, uncheck the **Inherit settings** checkbox and choose the appropriate document type.

Selecting the **Hide folder** checkbox will hide the selected folder from any user who does not have the *View* permission for the selected document type.

Selecting the **Apply to all subfolders** checkbox will apply the selections to all subfolders.

Select the  button when you are finished.

After assigning a document type, documents landing in this folder from a drag-and-drop upload will inherit the document type assigned.



## Note

Assigning a document type to a folder overrides each user's default document type for the catalog when performing a drag-and-drop upload.



*Folder Properties*

---

# Chapter 5. The Messages Folder

The **Messages** folder contains system message and notifications. Access it by first selecting the  button from the main menu. Select the  icon in the **Folders** frame to display the **Messages** folder. A copy of each message can be automatically sent to your e-mail address. For more information, see [Section 5.2, “Preferences”](#).

Icons displayed in the **Messages** folder are as follows:

 Message Unread

 Message Read

The following are some of the message types that can exist in your **Messages** folder:

Document Check-In Request	This message will be sent to you when another user has requested that a checked-out document be checked in, and you are the user who has previously checked out the document. Some of these documents may be in your <i>Approval Queue</i> [ <i>Enterprise Edition</i> ].
---------------------------	---

New Document in Approval Queue [ <i>Enterprise Edition</i> ]	This message will be sent to you when a document arrives in your <i>Approval Queue</i> . This notification can be enabled or disabled in your <a href="#">User Preferences</a> .
--	--

Zonal OCR Warning [ <i>Enterprise Edition</i> ]	When the Capture Service processes a captured document with zonal OCR, and the extracted text does not match the format of the document-type field, a message will be sent to you indicating the document to find in your <i>Coding Queue</i> . This notification can be enabled or disabled in your <a href="#">User Preferences</a> .
---	---

Unprocessed File Notification (Administrators only)	When the Capture Service has trouble processing one or more image files, a message will be sent to you indicating the problem encountered along with the full path to the problem file(s). This notification can be enabled or disabled in your <a href="#">User Preferences</a> .
---	--

The **Message Actions** menu allows you to mark one or more messages as **Read** or **Unread**. You may also **Delete** one or more messages from the list.

## The Messages Folder

The screenshot shows the 'Messages' folder in the Content Central application. The interface includes a top navigation bar with 'content central 7.6' logo, search, folders, capture, search all catalogs, admin, options, logout, and help buttons. A left sidebar lists navigation options: Messages, Checked Out, Approval Queue, Work Queue, Coding Queue, Custom Policies, and Catalog Browser. The main area displays a table of messages with columns for 'From', 'Subject', and 'Date Received'. A single message is shown, selected with a checkmark, from 'CMorgan' with the subject 'Content Central - User Check-In Request' received on 8/28/2009 at 9:01:00 PM. Below the table, the message content is displayed, starting with 'MThomas:' and a request to check-in a document. The message ends with 'This is an automated message. Please do not reply to this message.' and a signature '--Content Central'. The ADEMERO logo is visible at the bottom of the sidebar.

	From	Subject	Date Received
<input checked="" type="checkbox"/>	CMorgan	Content Central - User Check-In Request	8/28/2009 9:01:00 PM

MThomas:  
CMorgan has requested you check-in the document "Josh Powers - Application for Admission.pdf" from catalog "Student Records" to Content Central.  
This is an automated message. Please do not reply to this message.  
--Content Central

The **Messages** Folder

---

# Chapter 6. Mobile Site

The Content Central Mobile site is designed for mobile devices like smart phones and tablets. It contains a subset of tools that are available in the full application.

## 1. Connecting to the Mobile Site

To access Content Central Mobile you will need to launch your preferred Web browser on your mobile device and enter the URL (address) for Content Central. In most cases, your mobile device will be automatically detected, and the mobile version of Content Central will be launched.

To access the mobile site manually, enter `/mobile` at the end of the URL for Content Central. For example, if your Content Central URL is `http://contentcentral.domain.comm/`, the mobile site will be located at `http://contentcentral.mydomain.comm/mobile/`.

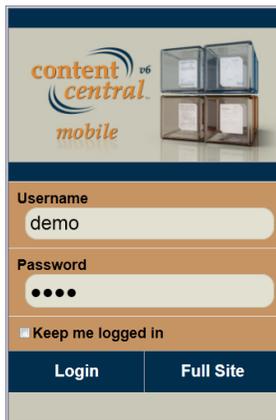
Once you've successfully accessed Content Central Mobile, you will need to provide your **Username** and **Password**. Use the same credentials you would use for the full site and select the **Login** button. To navigate to the full version of Content Central, select the **Full Site** button.

If you would like to prevent having to log in each time, select the **Keep me logged in** checkbox.



### Note

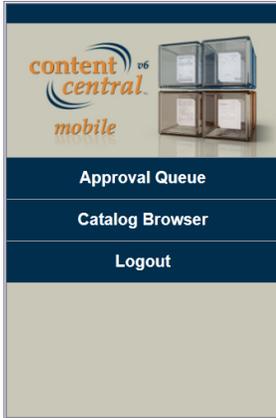
This option may not be available in all configurations. Selecting the **Logout** button on the main menu will require you to log in again.



*Logging In to Content Central Mobile*

## 2. The Main Menu

The main menu is displayed after you login. From the main menu you can access the mobile versions of the **Approval Queue** and the **Catalog Browser**. You can also **Logout** of the mobile site.



The Main Menu

### 3. The Approval Queue

Your **Approval Queue** contains documents or packets that have been routed to you based on an approval process. Access it by selecting **Approval Queue** button from the main menu.

Only one document at a time is displayed in this mobile version of the **Approval Queue**. Use the **Previous** and **Next** buttons at the top of the page or the navigation menu on the next line to access other documents in your queue.

Select the **View/Save** button to download the current document.

The center portion of the page describes various aspects of the current document as it relates to the approval process.

To approve or reject a document, enter an optional **Note for approval/rejection** and select the **Approve** or **Reject** button.

In some cases, you may need to select a specific user recipient for approval or rejection and/or enter your personal PIN.

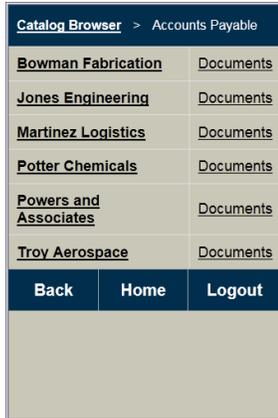
To return to the main menu, select the **Home** button. To logout, select the **Logout** button.



The **Approval Queue**

## 4. The Catalog Browser

The **Catalog Browser** allows you to navigate through folders of documents you can access in the system. Access it by selecting **Catalog Browser** button from the main menu.



Catalog Browser > Accounts Payable	
<a href="#">Bowman Fabrication</a>	Documents
<a href="#">Jones Engineering</a>	Documents
<a href="#">Martinez Logistics</a>	Documents
<a href="#">Potter Chemicals</a>	Documents
<a href="#">Powers and Associates</a>	Documents
<a href="#">Troy Aerospace</a>	Documents
<a href="#">Back</a>	<a href="#">Home</a>
<a href="#">Logout</a>	

The **Catalog Browser**

### 4.1. Folder View

The **Catalog Browser** is divided into two views: folder and file. The folder view is displayed when you first enter the **Catalog Browser**. The navigation area at the top of the page keeps track of your location. You can select an individual folder from this panel to jump directly to that folder.

To navigate into a folder, select any link from the *left* column. To view a list of documents for the listed catalog folder, select the **Documents** link in the *right* column.

To move back one folder level, select the **Back** button at the bottom of the page. To return to the main menu, select the **Home** button. To logout, select the **Logout** button.

### 4.2. File View

When selecting a **Documents** link, you will be presented with the file view. Just as in folder view, the navigation area at the top of the page displays your current location. You can select an individual folder from this panel to jump directly to that folder view.

Only one document is displayed at a time in file view. The navigation area below your current location allows you to move to the **Previous** or **Next** document in the folder. The center portion of the page describes the name of the current document as well as its catalog and document type.

Select the **View/Save** button to download the current document.

To move back to folder view, select the **Back** button at the bottom of the page. To return to the main menu, select the **Home** button. To logout, select the **Logout** button.

---

# Appendix A. Supported File Types with Existing Content

As of version 6.5.x these are the supported file types that the Catalog Service will recognize for *existing* content and metadata.

Adobe Acrobat (\*.pdf)  
Ami Pro (\*.sam)  
Ansi Text (\*.txt)  
ASCII Text  
ASF media files (metadata only) (\*.asf)  
CSV (Comma-separated values) (\*.csv)  
DBF (\*.dbf)  
EBCDIC  
EML files (emails saved by Outlook Express) (\*.eml)  
Enhanced Metafile Format (\*.emf)  
Eudora MBX message files (\*.mbx)  
GZIP (\*.gz)  
HTML (\*.htm, \*.html)  
JPG (\*.jpg)  
Lotus 1-2-3 (\*.wk?, \*.123)  
MBOX email archives (including Thunderbird) (\*.mbx)  
MHT archives (HTML archives saved by Internet Explorer) (\*.mht)  
MIME messages  
MSG files (emails saved by Outlook) (\*.msg)  
Microsoft Access MDB files (\*.mdb)  
Microsoft Document Imaging (\*.mdi)  
Microsoft Excel (\*.xls)  
Microsoft Excel 2003 XML (\*.xml)  
Microsoft Excel 2007 (\*.xlsx)  
Microsoft Outlook/Exchange  
Microsoft Outlook Express 5 and 6 (\*.dbx) message stores  
Microsoft PowerPoint (\*.ppt)  
Microsoft PowerPoint 2007 (\*.pptx)  
Microsoft Rich Text Format (\*.rtf)  
Microsoft Searchable Tiff (\*.tiff)  
Microsoft Word for DOS (\*.doc)  
Microsoft Word (\*.doc)  
Microsoft Word 2003 XML (\*.xml)  
Microsoft Word 2007 (\*.docx)  
Microsoft Works (\*.wks)  
MP3 (metadata only) (\*.mp3)  
Multimate Advantage II (\*.dox)  
Multimate version 4 (\*.doc)  
OpenOffice 2.x and 1.x documents, spreadsheets, and presentations (\*.sxc, \*.sxd, \*.sxi, \*.sxw, \*.sxcg, \*.stc, \*.sti, \*.stw, \*.stm, \*.odt, \*.ott, \*.odg, \*.otg, \*.odp, \*.otp, \*.ods, \*.ots, \*.odf) (includes OASIS Open Document Format for Office Applications)  
Quattro Pro (\*.wb1, \*.wb2, \*.wb3, \*.qpw)  
TAR (\*.tar)  
TIF (\*.tif)

Supported File Types  
with Existing Content

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TNEF (winmail.dat)  
Treepad HJT files (\*.hjt)  
Unicode (UCS16, Mac or Windows byte order, or UTF-8)  
Windows Metafile Format (\*.wmf)  
WMA media files (metadata only) (\*.wma)  
WMV video files (metadata only) (\*.wmv)  
WordPerfect 4.2 (\*.wpd, \*.wpf)  
WordPerfect (5.0 and later) (\*.wpd, \*.wpf)  
WordStar versions 1, 2, 3 (\*.ws)  
WordStar versions 4, 5, 6 (\*.ws)  
WordStar 2000  
Write (\*.wri)  
XBase (including FoxPro, dBase, and other XBase-compatible formats) (\*.dbf)  
XML (\*.xml)  
XML Paper Specification (\*.xps)  
XSL  
XyWrite  
ZIP (\*.zip)

---

# Appendix B. Advanced Search Syntax

## 1. Search Requests

Content Central supports three types of *full-text* search requests:

**Any Words** An *any words* search is any sequence of text, such as a sentence or question. In this type of search, use quotation marks around phrases, place a + in front of any word or phrase that is required, and place a - in front of a word or phrase to exclude it.

### Example B.1. Any-Words Request

```
banana pear "apple pie"  
"apple pie" -salad +"ice cream"
```

**All Words** An *all words* search request is similar to an *any words* request except that all of the words in the search request must be present for a document to be found.

**Boolean** A search request consists of word or phrase groups linked by connectors such as *AND* and *OR*, which indicate the relationship between them.

### Table B.1. Boolean Search Requests

apple and pear	both words must be present
apple or pear	either word can be present
apple w/5 pear	apple must occur within 5 words of pear
apple not w/5 pear	apple must occur, but not within 5 words of pear
apple and not pear	only apple must be present

If you use more than one connector, use parentheses to indicate precisely what you want to search for. For example, *apple and pear or orange* could mean *(apple and pear) or orange*, or it could mean *apple and (pear or orange)*.

Noise words, such as *if* and *the*, are ignored.

Search terms may include the following special characters:

### Table B.2. Special Characters

?	matches any character
=	matches any single digit
*	matches any number of characters
~~	range search

## 2. Words and Phrases

To search for a phrase, use quotation marks around it.

### Example B.2. Phrase Search

apple w/5 "fruit salad"

If a phrase contains a noise word, the search engine will skip over the noise word when searching for it. For example, when search for *statue of liberty*, the engine would retrieve documents containing the word *statue*, any intervening word, and the word *liberty*.

Punctuation inside of a search word is treated as a space. Example: *can't* would be treated as a phrase consisting of two words: *can* and *t*.

## 3. Wildcards

A search word can contain the wildcard characters `*` and `?`. A `?` in a word matches any single character, and a `*` matches any number of characters. The wildcard characters can be in any position in a word. For example:

*appl\** would match *apple*, *application*, etc. *\*cipl\** would match *principle*, *participle*, etc. *appl?* would match *apply* and *apple* but not *apples*. *ap\*ed* would match *applied*, *approved*, etc.

Use of the `*` wildcard character near the beginning of a word will slow searches somewhat.

The `=` wildcard matches any single digit. For example: *N===* would match *N123* but not *N1234* or *Nabc*.

## 4. Fuzzy Searching

Fuzzy searching will find a word even if it is misspelled. For example, a fuzzy search for *apple* will find *apple*. Fuzzy searching can be useful when you are searching text that may contain typographical errors, or for text that has been scanned using optical character recognition (OCR).

Add fuzziness selectively using the `%` character. The number of `%` characters you add determines the number of differences the search engine will ignore when searching for a word. The position of the `%` characters determines how many letters at the start of the word have to match exactly. Examples: *ba%anana*: Word must begin with *ba* and have at most one difference between it and *banana*. *b%%anana*: Word must begin with *b* and have at most two differences between it and *banana*.

## 5. Phonic Searching

Phonic searching looks for a word that sounds like the word you are searching for and begins with the same letter. For example, a phonic search for *Smith* will also find *Smithe* and *Smythe*.

To ask the search engine to search for a word phonically, put a `#` in front of the word in your search request. Examples: *#smith*, *#johnson*

## 6. Stemming

Stemming extends a search to cover grammatical variations on a word. For example, a search for *fish* would also find *fishing*. A search for *applied* would also find *applying*, *applies*, and *apply*.

To add stemming selectively, add a `~` at the end of words that you want stemmed in a search. Example: *apply~* The stemming rules included with the search engine are designed to work with the English language.

## 7. Numeric Range Searching

A numeric range search is a search for any numbers that fall within a range. To add a numeric range component to a search request, enter the upper and lower bounds of the search separated by `~~` like this: *apple w/5 12~~17*. This request would find any document containing *apple* within 5 words of a number between 12 and 17.

### Note

A numeric range search includes the upper and lower bounds (so 12 and 17 would be retrieved in the above example).

### Note

Numeric range searches only work with positive integers.

### Note

For purposes of numeric range searching, decimal points and commas are treated as spaces and minus signs are ignored. For example, *-123,456.78* would be interpreted as: *123 456 78* (three numbers). Using alphabet customization, the interpretation of punctuation characters can be changed. For example, if you change the comma and period from space to ignore, then *123,456.78* would be interpreted as *12345678*.

## 8. AND Connector

Use the *AND* connector in a search request to connect two expressions, both of which must be found in any document retrieved. For example: *apple pie and poached pear* would retrieve any document that contains both phrases. *(apple or banana) and (pear w/5 grape)* would retrieve any document that (1) contains either *apple* OR *banana*, AND (2) contains *pear* within 5 words of *grape*.

## 9. OR Connector

Use the *OR* connector in a search request to connect two expressions, at least one of which must be found in any document retrieved. For example, *apple pie or poached pear* would retrieve any document that contained *apple pie*, *poached pear*, or both.

## 10. W/N Connector

Use the *W/N* connector in a search request to specify that one word or phrase must occur within N words of the other. For example, *apple w/5 pear* would retrieve any document that contained *apple* within 5 words of *pear*. The following are examples of search requests using *W/N*:

(apple or pear) w/5 banana  
 (apple w/5 banana) w/10 pear  
 (apple and banana) w/10 pear

The *pre/N* connector is like *W/N* but also specifies that the first expression must occur before the second. Example:

(apple or pear) pre/5 banana

Some types of complex expressions using the *W/N* connector will produce ambiguous results and should not be used. The following are examples of ambiguous search requests:

(apple and banana) w/10 (pear and grape)  
(apple w/10 banana) w/10 (pear and grape)

In general, at least one of the two expressions connected by *W/N* must be a single word or phrase or a group of words and phrases connected by *OR*. Example:

(apple and banana) w/10 (pear or grape)  
(apple and banana) w/10 orange tree

## 11. NOT and NOT W/N

Use *NOT* in front of any search expression to reverse its meaning. This allows you to exclude documents from a search. Example:

apple sauce and not pear

*NOT* standing alone can be the start of a search request. For example, *not pear* would retrieve all documents that did not contain *pear*.

If *NOT* is not the first connector in a request, you need to use either *AND* or *OR* with *NOT*:

apple or not pear  
not (apple w/5 pear)

The *NOT W/* ("not within") operator allows you to search for a word or phrase not in association with another word or phrase. Example:

apple not w/20 pear

Unlike the *W/* operator, *NOT W/* is not symmetrical. That is, *apple not w/20 pear* is not the same as *pear not w/20 apple*. In the *apple not w/20 pear* request, the search engine searches for *apple* and excludes cases where *apple* is too close to *pear*. In the *pear not w/20 apple* request, the search engine searches for *pear* and excludes cases where *pear* is too close to *apple*.

---

# Appendix C. Supported Bar Code Symbologies

As of version 6.5.x these are the supported bar code symbologies that the Capture Service will recognize when one or more recognition zones have been defined in a document type.

- Codabar
- Code 11
- Code 128
- Code 128 (EAN-128)
- Code 3 of 9
- EAN-13
- EAN-8
- Industrial 2 of 5 (Code 25)
- Interleaved 2 of 5
- Matrix 2 of 5
- Plessey
- UPC-A
- UPC-E