VIRTUALCABINET

Admin Guide

Version 5.4

1 Contents

2 Admin Users

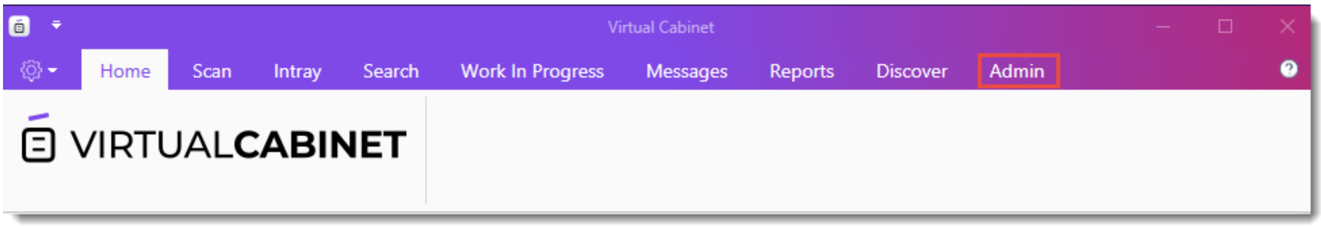
A Virtual Cabinet system has at least one 'Admin User'. An Admin User can change various aspects of the Virtual Cabinet experience for other users of the system.

An Admin User can:

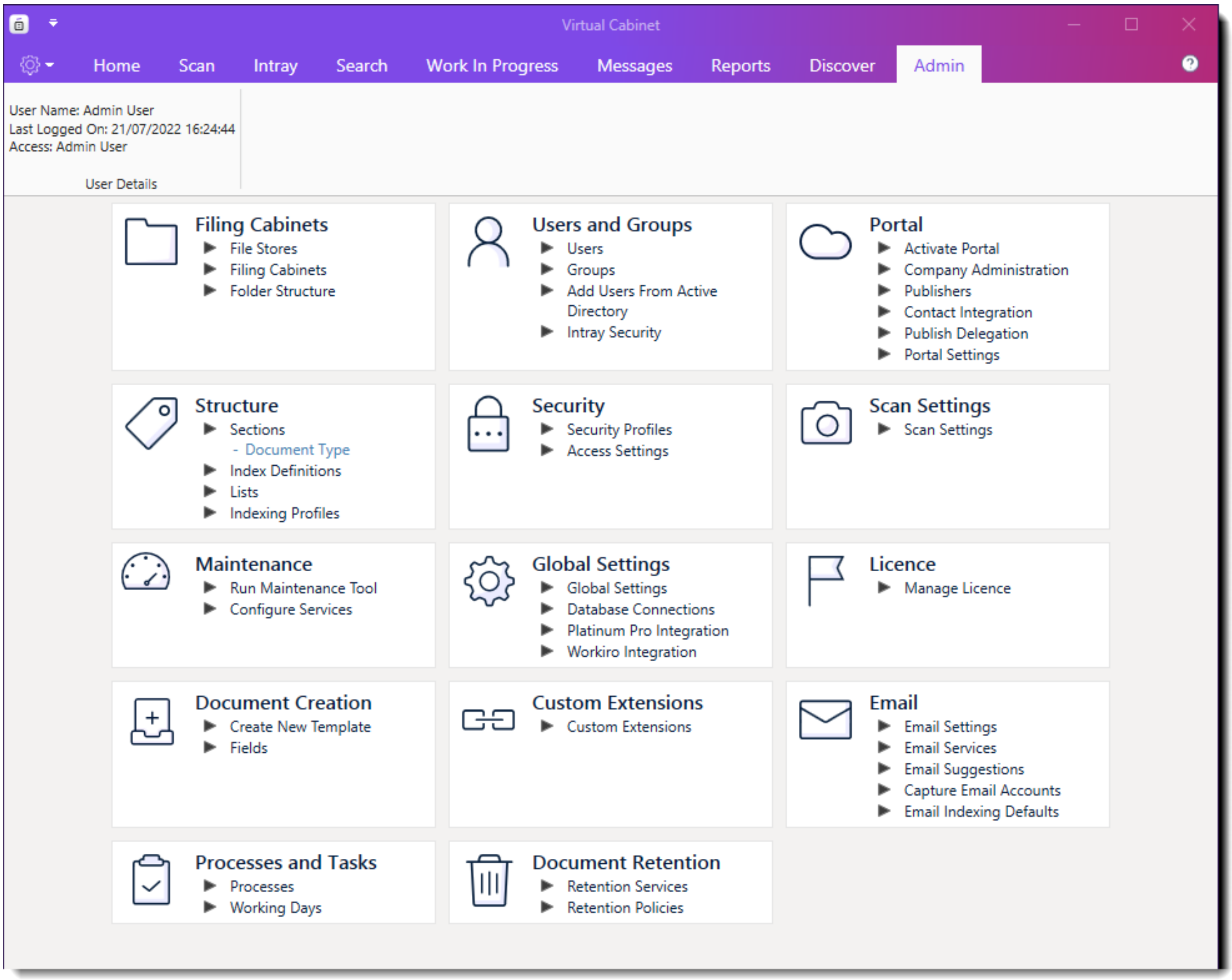
- Add new users to the system, up to the maximum number allowed by the licence.
- Edit or delete any other user in the system.
- Add, edit or delete any Filing Cabinet or Folder in the system.
- Grant or withdraw permissions so that other users can only access certain documents and features of the system.
- Edit the structure of indexing information that allows other users to find documents.
- Add, edit or delete Scan Settings that enable other users to scan documents into the system.
- View and update the Virtual Cabinet licence.
- Check the integrity of documents that are stored in the system.
- Join the system to the Virtual Cabinet Portal, enabling selected 'Publishers' to place documents online where they can be viewed securely by selected recipients.
- Add, edit or delete Processes and Tasks.

3 Virtual Cabinet Admin Tab

When you are logged into the Virtual Cabinet Client as an Admin User, an 'Admin' tab is available near the top of the window.



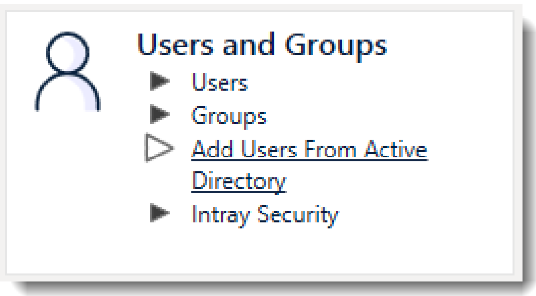
Clicking on the Admin tab shows the Admin area of the Virtual Cabinet Client.



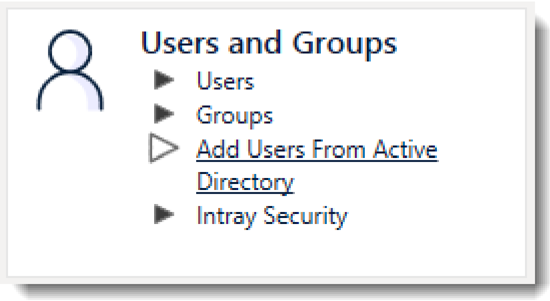
Each panel in the Admin area allows access to a different aspect of the system:

Panel	Description
Filing Cabinets	Add, edit and delete parts of the file store/filing structure that is used to hold documents.
Users and Groups	Add, edit and delete Users and the Groups that they belong to.
Portal	Activate the Virtual Cabinet Portal functionality and decide which Users can publish documents online.
Structure	Create and edit the indexing structure that will define how documents are stored and searched for.
Security	Defines the viewing and editing permissions that Users have over the documents and features of the system.
Scan Settings	Add, edit and delete Scan Settings that enable other Users to scan documents.
Maintenance	Checks the integrity of the documents that are stored in the system.
Global Settings	View and edit settings that will affect all Users.
License	View and update the Virtual Cabinet licence.
Document Creation	Create new Templates and manage Fields used for Document Creation. See Document Creation Guide for further information. Only visible with appropriate Access Settings.
Custom Extensions	Create and Maintain Custom Extensions. See the Custom Extensions Guide for further information.
Email	View and configure settings related to the automated capture of emails and the Microsoft Outlook Addin.
Processes and Tasks	View and manage Processes and Tasks for Virtual Cabinet users and groups.

An option will become underlined when your mouse moves over it. You can click on an option to access it.



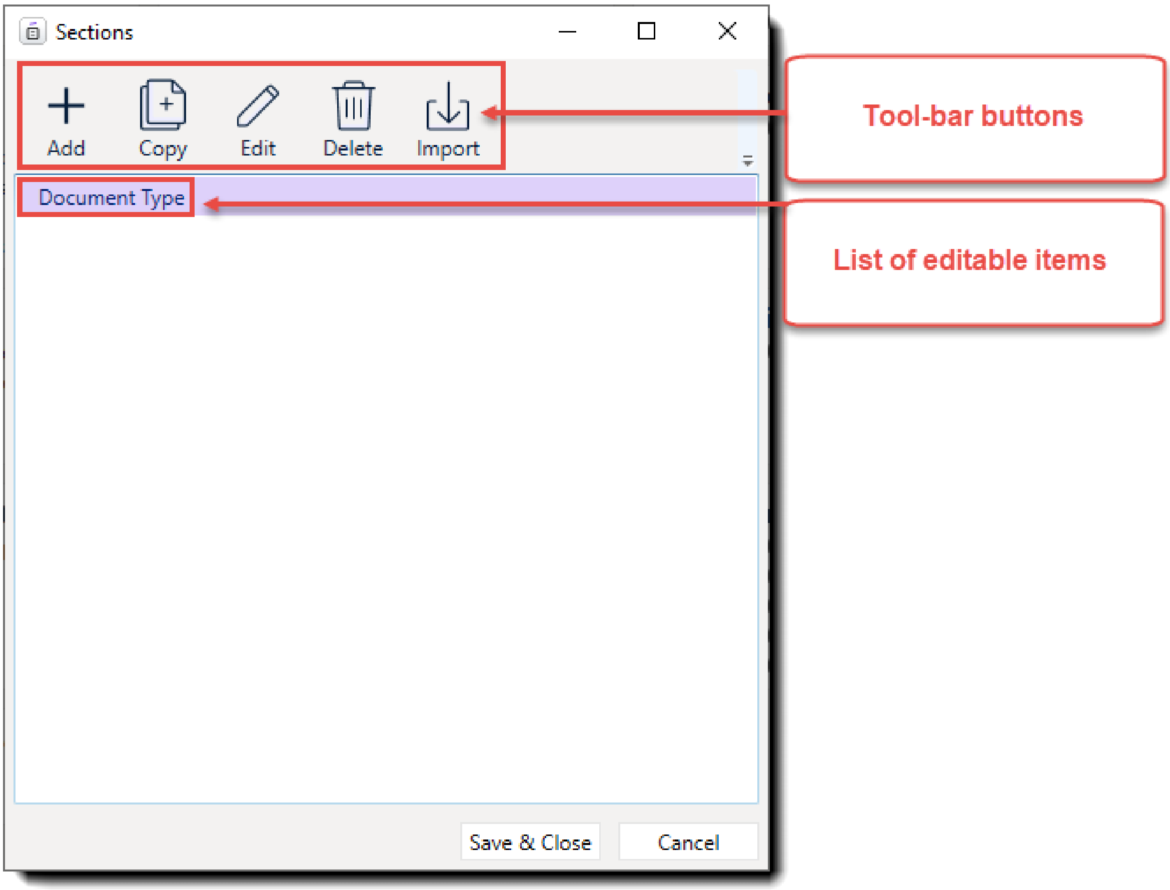
Individual Sections are listed to enable easy identification and direct access.



4 List Windows

The main function of the Admin area is to allow you to view and edit the data structures in your system. Many of these data structures are presented in lists to enable quick and easy access.

List windows are arranged with a central list, a row of toolbar buttons along the top and two buttons in the lower right-hand corner.



4.1 The List

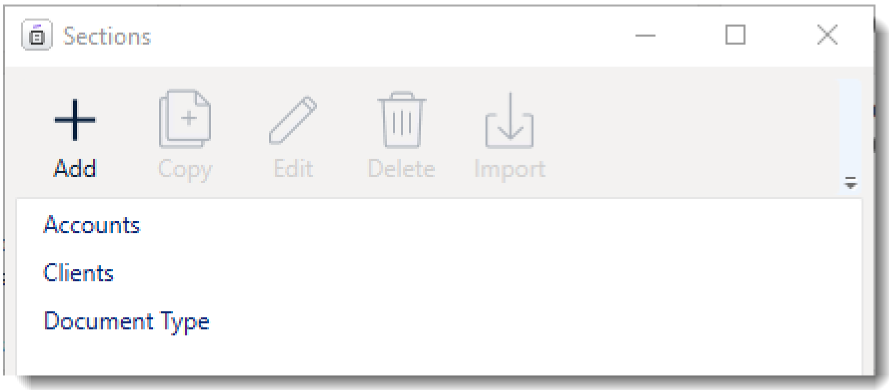
The central list shows all the items of a specified type that are currently in the system. If the list is empty, there are currently no items of that type in the system. You can select an item by clicking on it.

You can select multiple items by holding down the 'CTRL' key and clicking on the items you want to select.

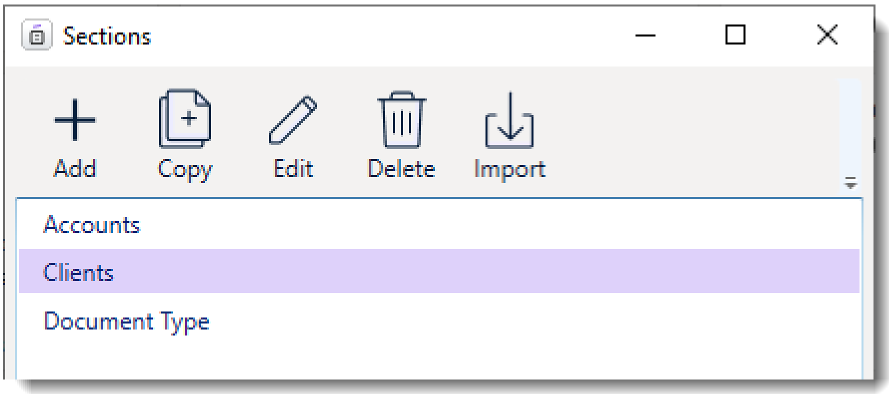
4.2 The Toolbar Buttons

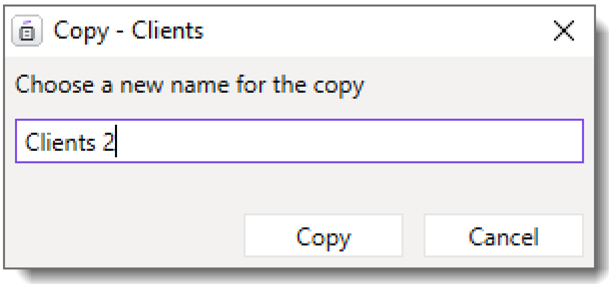
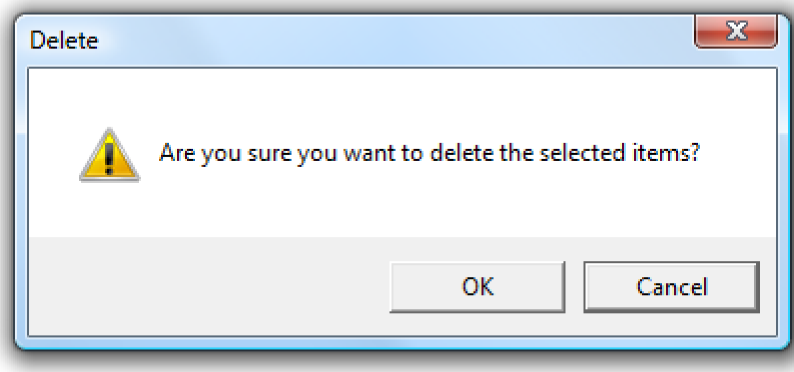
The toolbar contains buttons that perform actions on the currently selected item in the list.

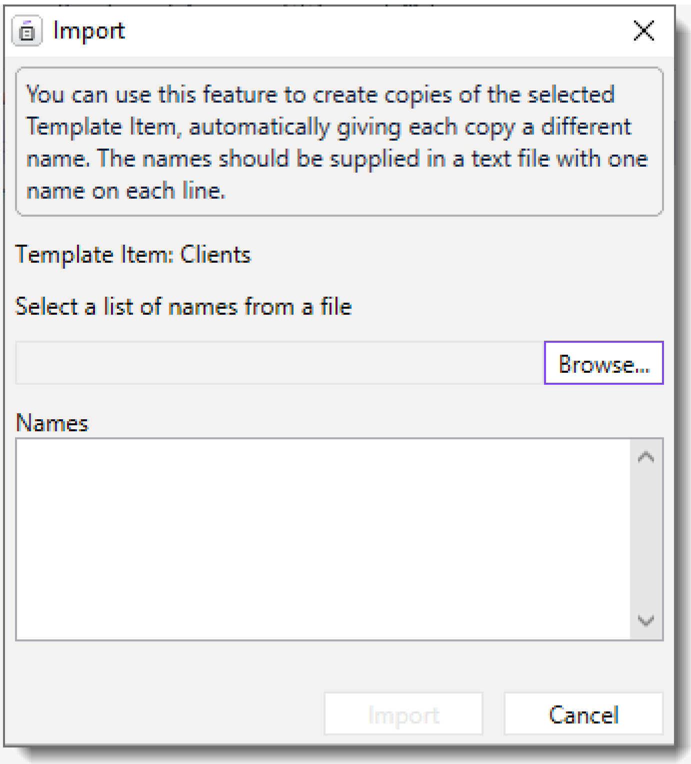
If no item is selected then only the Add button will be available.



If an item is selected then all the buttons will be available.



Button	Description
Add	Enables you to create a new item and add it to the list. This action will open a new window so that you can define the item and choose whether to add it.
Copy	Copies the selected item in the list. You will be prompted to name the new copy.  When choosing a new name for the copy, the 'Copy' button will become available when a new name is typed.
Edit	Allows you to edit the selected item from the list. This action will open a new window that contains the options for editing the item.
Delete	Deletes the selected items. You will be prompted to confirm the delete operation. Deleted items cannot be retrieved. 
Import	Enables you to quickly create multiple copies of the selected item. You will be prompted to choose a pre-prepared text file that contains a list of names for new copies. The text file must have exactly one name on each line.



Once you have chosen a text file, the new names will appear in the preview window. You can then click the 'Import' button to create a copy for each new name. Depending on the number of copies being created and the complexity of the structure, this operation may take some time to update the system.

4.3 The 'Save & Close' and 'Cancel' Buttons

The lower right-hand corner of the list window contains a 'Save & Close' button and a 'Cancel' button.

The 'Save & Close' button will save any changes you have made to the system. The list window close once the system has been updated.

The 'Cancel' button will close the list window without saving your changes.

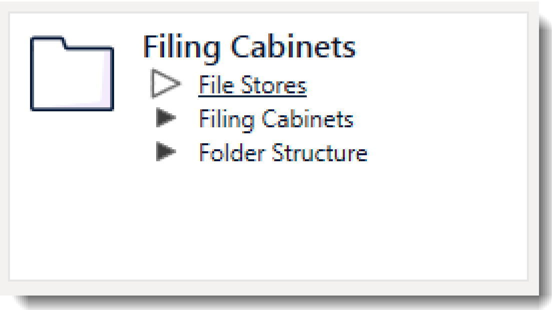
Please note that some of your changes may have had an immediate effect on the system and will have already been saved. Changes that are going to have an immediate effect on the system will prompt you for confirmation or may have had their own 'Save' button.

5 File Stores

File Stores are the top level of a Virtual Cabinet filing structure. A File Store identifies a location on a server that can hold the files for one or more Filing Cabinets.

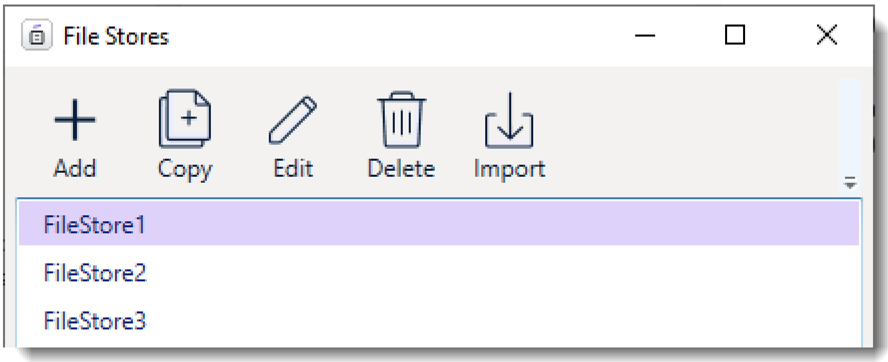
5.1 Opening the File Stores List Window

You can open the File Stores list window by clicking on the 'File Stores' link in the Filing Cabinets section of the Admin area.



5.2 The File Stores List Window

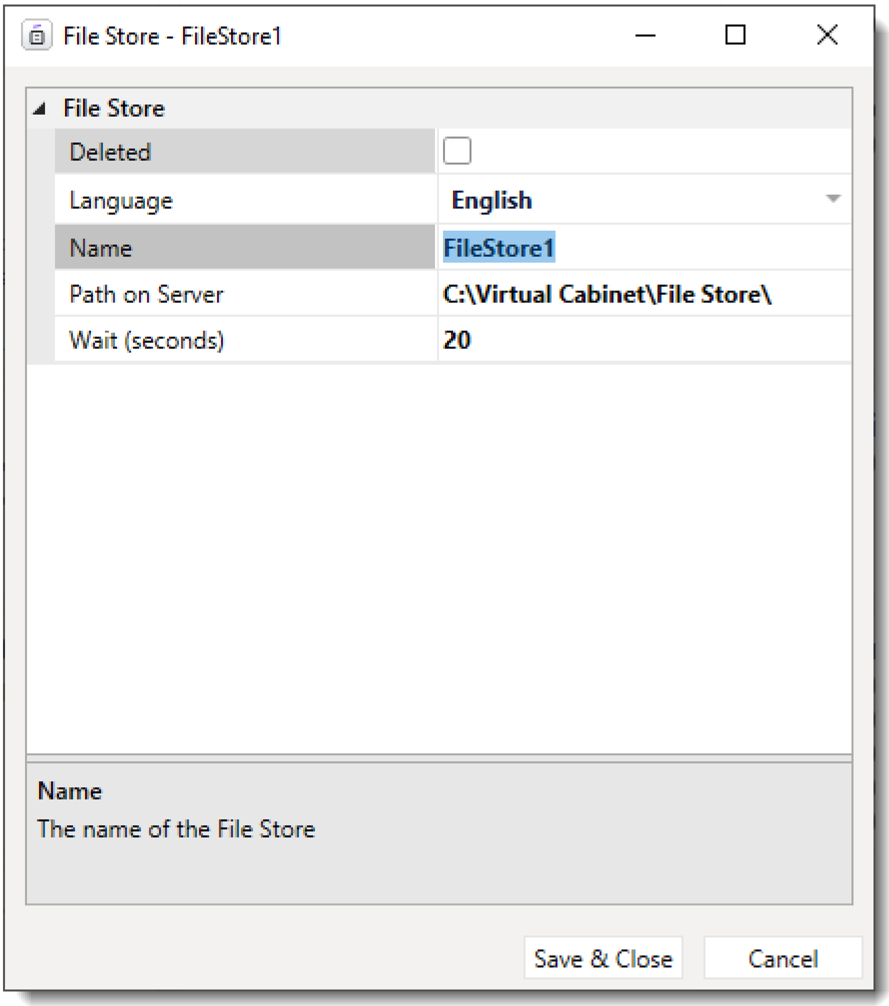
The File Stores list window shows all of the available File Stores in the system. If no File Store is selected then only the Add button will be available.



You can click 'Add' to create a new File Store. Alternatively, you can edit an existing File Store by double-clicking on one or by selecting one and clicking the 'Edit' button.

5.3 The File Store Window

The File Store window allows you to create a File Store, set the language for it (the language of the documents to be stored within it), the file path on the server and specify the polling interval for the content indexer.



Option name	Description	Required
Language	Specifies the language of documents to be stored in the filing cabinet. This is required for Content Searching to correctly search the content of the documents.	Yes
Name	The name of the File Store.	Yes
Path on Server	Specifies where documents will be stored on the server.	Yes
Wait (seconds)	The number of seconds to wait between checks for new content-searchable documents. A smaller number will result in more frequent checks and may affect server performance.	Yes

6 Filing Cabinets

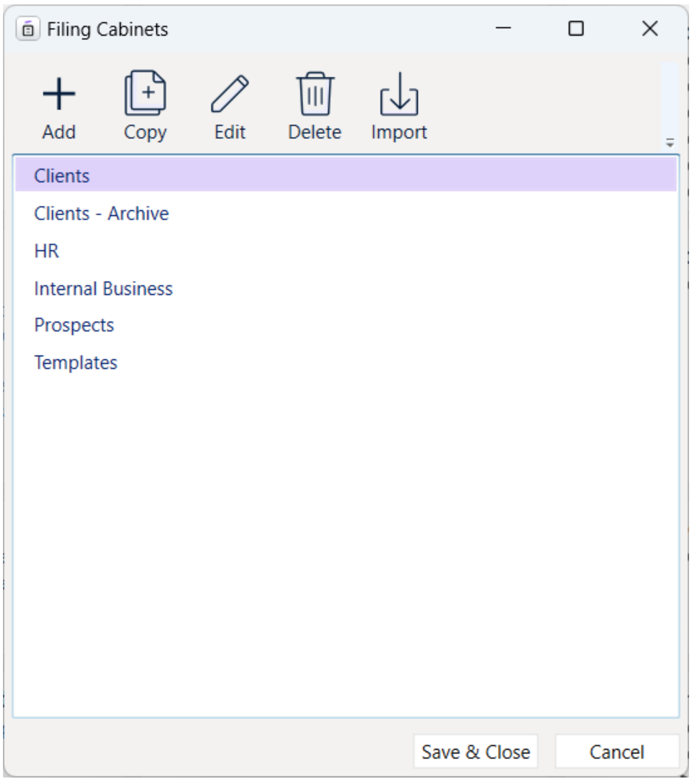
Cabinets can contain documents or folders. Cabinets can have permissions so that only certain Users and Groups can access them.

6.1 Opening the Filing Cabinets List Window

You can open the Filing Cabinets list window by clicking on the ‘Filing Cabinets’ link in the Filing Cabinets section of the Admin area.

6.2 The Filing Cabinets List Window

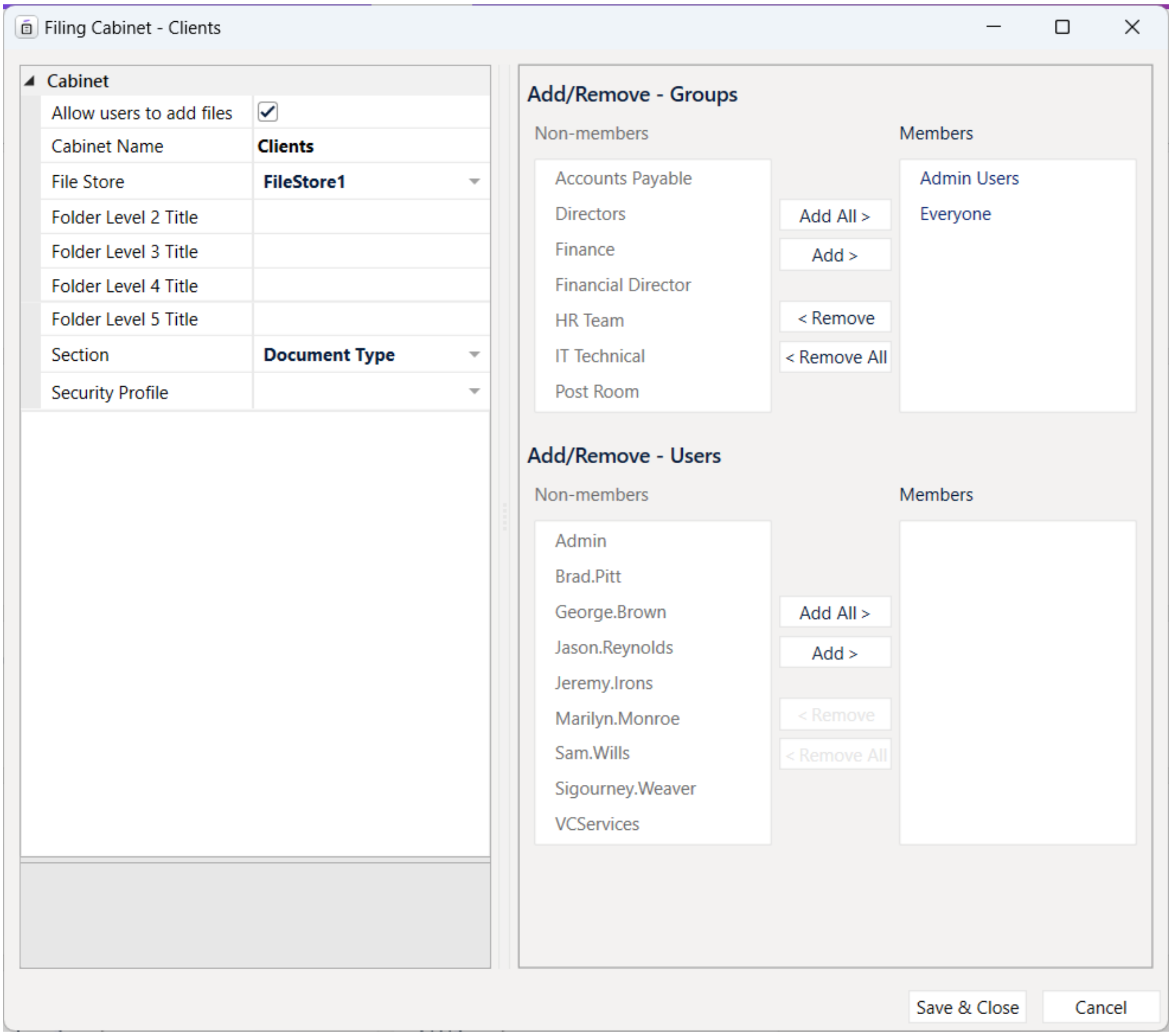
The Filing Cabinets list window shows all of the available Filing Cabinets in the system. If no Filing Cabinet is selected then only the Add button will be available.

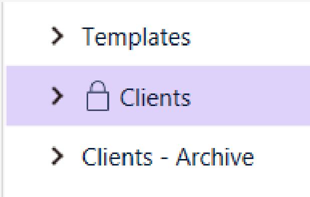


You can click 'Add' to create a new Filing Cabinet. Alternatively, you can edit an existing Filing Cabinet by double-clicking on one or by selecting one and clicking the 'Edit' button.

6.3 The Filing Cabinet Window

The Filing Cabinet window allows you to create a Filing Cabinet, set the security for it, and specify which Users and Groups can see it.



Option name	Description	Required
Allow users to add files	If ticked, Users will be allowed to index documents directly into this Filing Cabinet. If this option is not ticked, Users will have to index documents into a subfolder within the Filing Cabinet. This option is ticked by default. Cabinets that do not allow Users to add files have padlock next to them to indicate that a subfolder must be selected. 	
File Store	Specifies the File Store the filing cabinet is associated with. More than one Filing Cabinet can be associated with the same File Store. Once specified any documents filed into this Filing Cabinet will be stored in the server location specified by the associated File Store.	Yes
Folder Level Title	Sets the name of each level of the folder hierarchy, as shown at the top of the columns in search results for the Filing Cabinet.	
Name	The name of the Filing Cabinet.	Yes
Section	A choice between the available Sections in the system. This will determine the types of document that can be indexed into the Filing Cabinet.	Yes
Security	A choice of the available Security Profiles in the system. The selected Security Profile will be the default Security Profile that is suggested when a document is being indexed in this Filing Cabinet. If left blank, the selected Security Profile will be the 'Default Security' from the chosen Section instead. This Security Profile can be overridden by subfolders. It can also be changed by Users that have 'Override Default Security' ticked in their Access Setting.	

The Filing Cabinet window also contains two other sections that allow you to associate the Filing Cabinet with Users and Groups. A User will only be able to see this Filing Cabinet if they are an associated User or a member of an associated Group.

The ‘Add/Remove – Groups’ section of the window can be used to associate the Filing Cabinet with Groups. The ‘Members’ list on the right-hand side lists all the Groups that are associated with this Filing Cabinet. The ‘Non-members’ list on the left-hand side lists the other Groups that are not associated with this Filing Cabinet.

You can add a Group by selecting an applicable Group in the ‘Non-members’ list and clicking the ‘Add’ button. The Group will move across to the ‘Members’ list and will become associated with the Filing Cabinet when you click ‘Save & Close’ to save the edited Filing Cabinet.

The ‘Add/Remove – Users’ section of the window can be used to associate the Filing Cabinet with Users. The ‘Members’ list on the right-hand side lists all the Users that that are members of this Filing Cabinet. The ‘Non-members’ list on the left-hand side lists the other Users that are not associated with this Filing Cabinet.

You can add a User by selecting a User in the ‘Non-members’ list and clicking the ‘Add’ button. The User will move across to the ‘Members’ list and will become associate with the Filing Cabinet when you click ‘Save & Close’ to save the edited Filing Cabinet.

7 Folder Structure

The folder structure determines the organisation of documents in the system. Documents are stored in folders, and folders can be stored inside other folders. This functionality can be used to build data structures that match your business requirements.

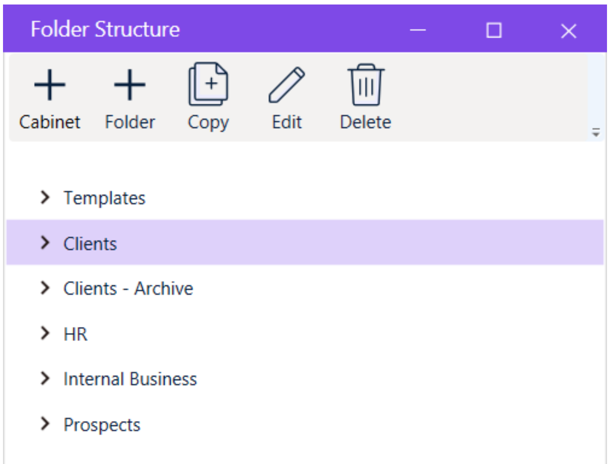
7.1 Opening the Folder Structure Window

You can open the Folder Structure window by clicking on the 'Folder Structure' link under the Filing Cabinets heading in the Admin area of the Client application.

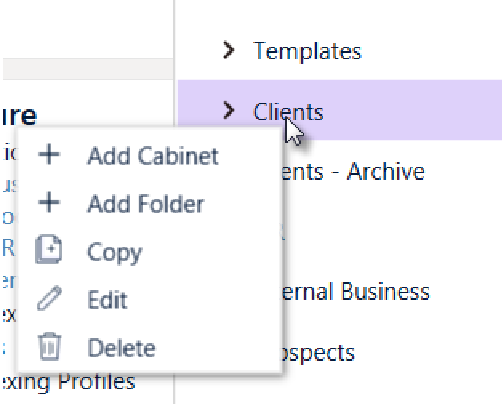
7.2 The Folder Structure Window

The Folder Structure window shows the current folder structure that exists in the system and enables you to add, edit and delete individual folders.

The Folder Structure window has a toolbar with buttons and also displays the Filing Cabinets that are in the system.



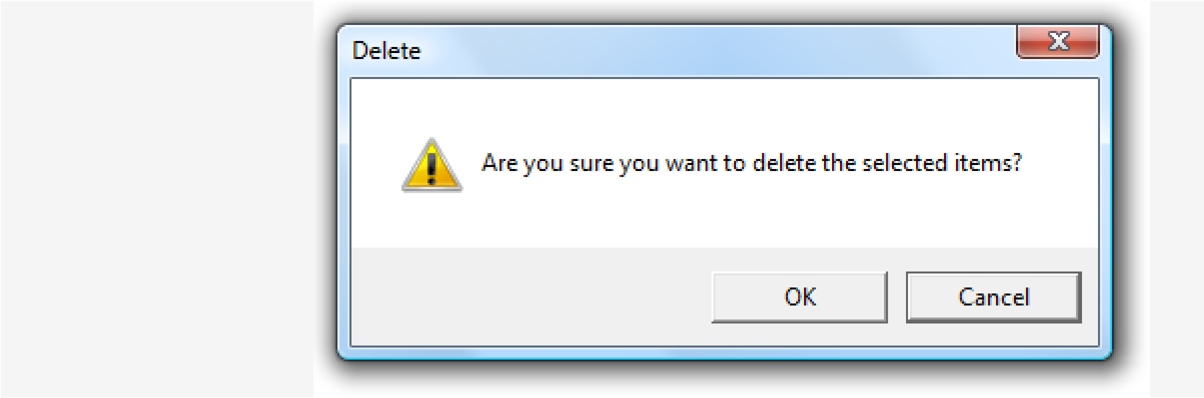
The folder structure can also be seen in the 'Cabinets' side-panel in the Search tab of the Client application. Here, the toolbar options can be found by right-clicking the mouse.



7.3 The Toolbar Buttons

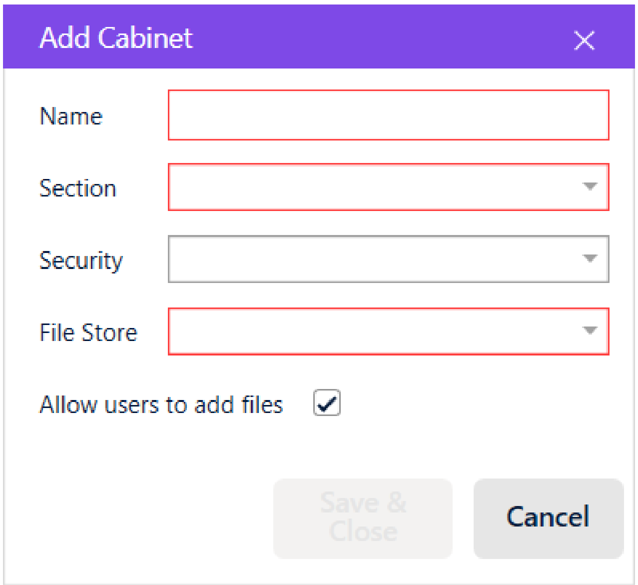
The toolbar buttons can be used to add, edit and delete folders. If no Filing Cabinet or folder is selected then only the Add Cabinet button will be available. A User must have the 'Edit Hierarchies' permission ticked in their Access Setting to be able to edit folder structures.

Button	Description
Add Cabinet	Used to create a new Filing Cabinet. This button will open a new window that enables you to set the details of the Filing Cabinet before it is created. New Filing Cabinets will always be added to the top level of the structure.
Add Folder	Used to create a new folder. This button will open a new window that enables you to set the details of the folder before it is created. New folders will be created as a sub-folder inside the currently selected folder or Filing Cabinet in the structure.
Copy	Copies the selected folder or Filing Cabinet. This button will open a new window that allows you to change the details of the copied folder of Filing Cabinet before it is created. When a folder or Filing Cabinet is copied, that whole branch of the folder structure is copied. The copying operation will create copies of all sub-folders that exist inside the original. Only the folder structure will is copied – the documents stored in those folders do not get copied.
Edit	Allows you to edit the selected folder or Filing Cabinet. This button opens a new window that enables you to edit the details of the folder or Filing Cabinet.
Delete	Deletes the selected folder or Filing Cabinet. You will be prompted to confirm that you want to perform the delete operation.

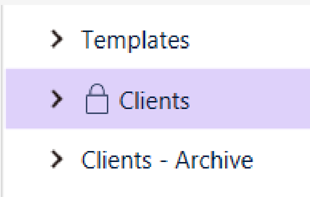


7.4 The Filing Cabinet Window

The Filing Cabinet window will appear when you have chosen to add or edit a Filing Cabinet.



Option	Description	Required
Name	Enables you to set the name of the Filing Cabinet.	Yes
Section	A choice of the available Sections in the system. The Section will determine the type of documents that can be stored in the Filing Cabinet.	Yes
Security	A choice of the available Security Profiles in the system. The Security will determine which Users have access to the documents that are stored in the Filing Cabinet. If left blank, the documents will use the 'Default Security' that is set on the chosen Section.	

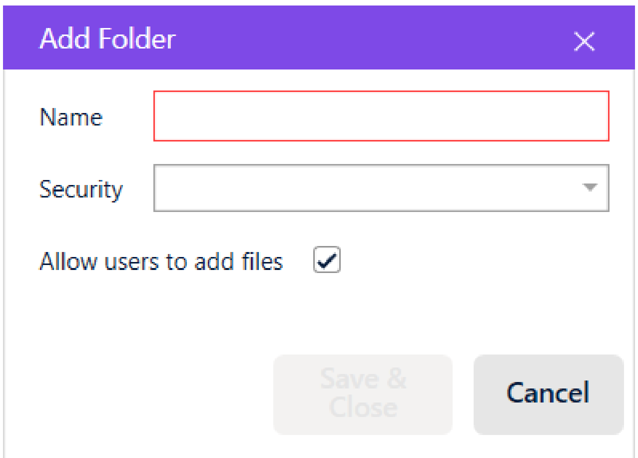
	This only sets the default for the Security Profile; it can be changed by Users that have 'Override Default Security' ticked in their Access Setting.
File Store	Allows you to specify the File Store where the documents will be saved to on the server.
Allow users to edit files	If ticked, Users will be allowed to index documents directly into this Filing Cabinet. If this option is not ticked, Users will have to index documents into a subfolder within the Filing Cabinet. This option is ticked by default. Cabinets that do not allow Users to add files have padlock next to them to indicate that a subfolder must be selected. 

The 'Save & Close' button is used to save the Filing Cabinet and close the window.

The window also has a 'Cancel' button. This button will revert the Filing Cabinet to before you made any changes and will close the window. If you are cancelling a new Filing Cabinet then it will not be created.

7.5 The Folder Window

The folder window will be shown when you choose to add or edit a folder.



Option	Description	Required
Name	Allows you to set the name of the folder.	Yes
Security	A choice of the available Security Profiles in the system. The Security will determine which Users have access to the documents that are stored in the Filing Cabinet. If left blank, the documents will use the Default Security that is set on the chosen Section in the Filing Cabinet that this folder belongs to. This only sets the default Security Profile - Users can set different security on individual documents while they are being indexed.	
Allow users to edit files	If ticked, Users will be allowed to index documents directly into this folder. If this option is not ticked, Users will have to index documents into a subfolder inside this folder. This option is ticked by default. Folders that do not allow Users to add files have a padlock next to them to indicate that a subfolder must be selected.	

The ‘Save & Close’ button is used to save the folder and close the window.

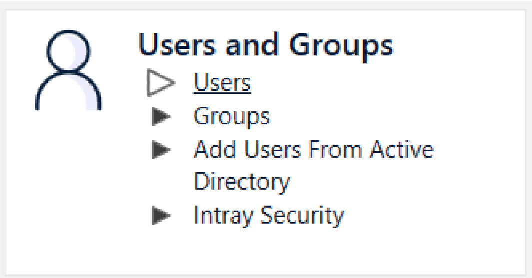
The window also has a ‘Cancel’ button. This button will revert the folder to before you made any changes and will close the window. If you are cancelling a new folder then it will not be created.

8 Users

A User is an individual person within Virtual Cabinet. Each person who uses the system will log into Virtual Cabinet as a different User. The Users window will allow you to edit details such as the User Name, person's name and password, and will let you decide which types of document that person is allowed to access.

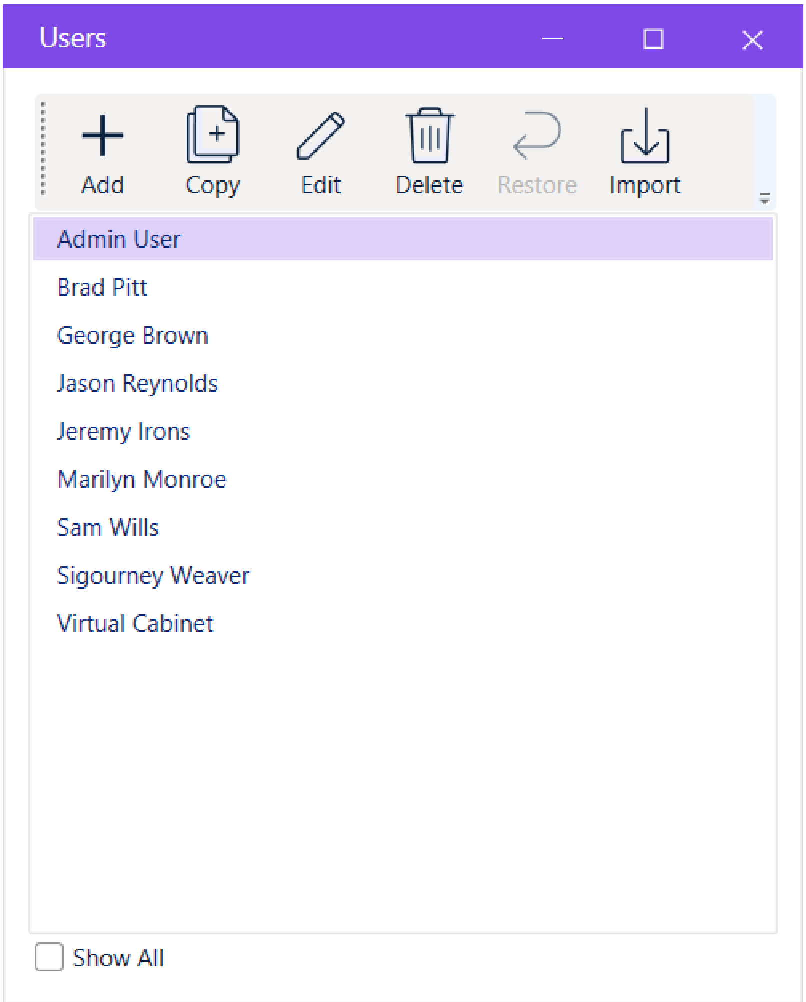
8.1 Opening the Users List Window

The Users list window can be opened from the main Admin area by clicking on the 'Users' link. The link can be found under the 'Users and Groups' heading.



8.2 The Users List Window

The Users are listed in the Users list window. If no User is selected, only the Add button will be available.

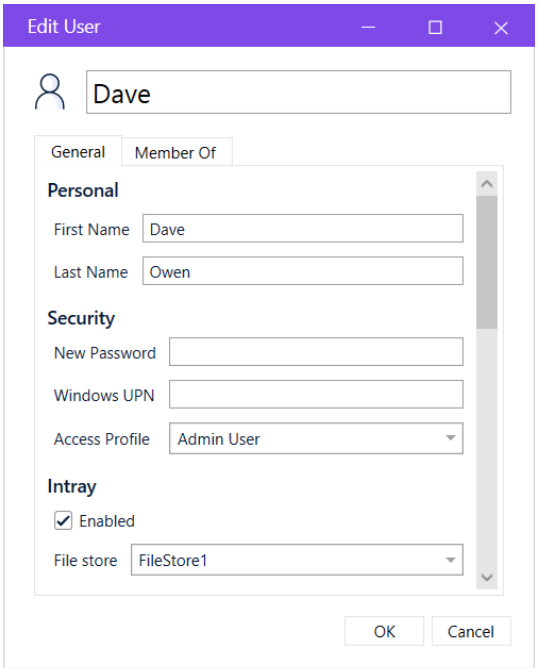


You can click ‘Add’ to create a new User. Alternatively, you can edit an existing User by double-clicking on one or by selecting one and clicking the ‘Edit’ button.

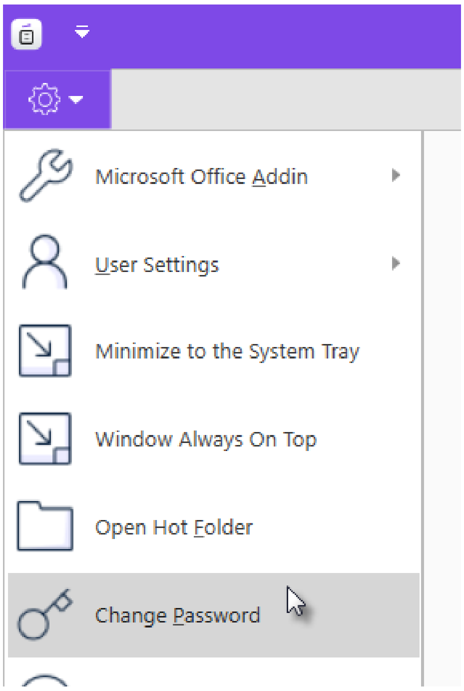
At the bottom of the list, there is a ‘Show All’ tick-box. If ticked, the list will display both current and deleted Users (the names of deleted Users will appear in faded text). Deleted Users are not shown by default. Once displayed deleted users can be restored using the ‘Restore’ button.

8.3 The User Window

The User window contains two tabs allowing you to define a User's details 'General' and their Group memberships 'Member Of'.



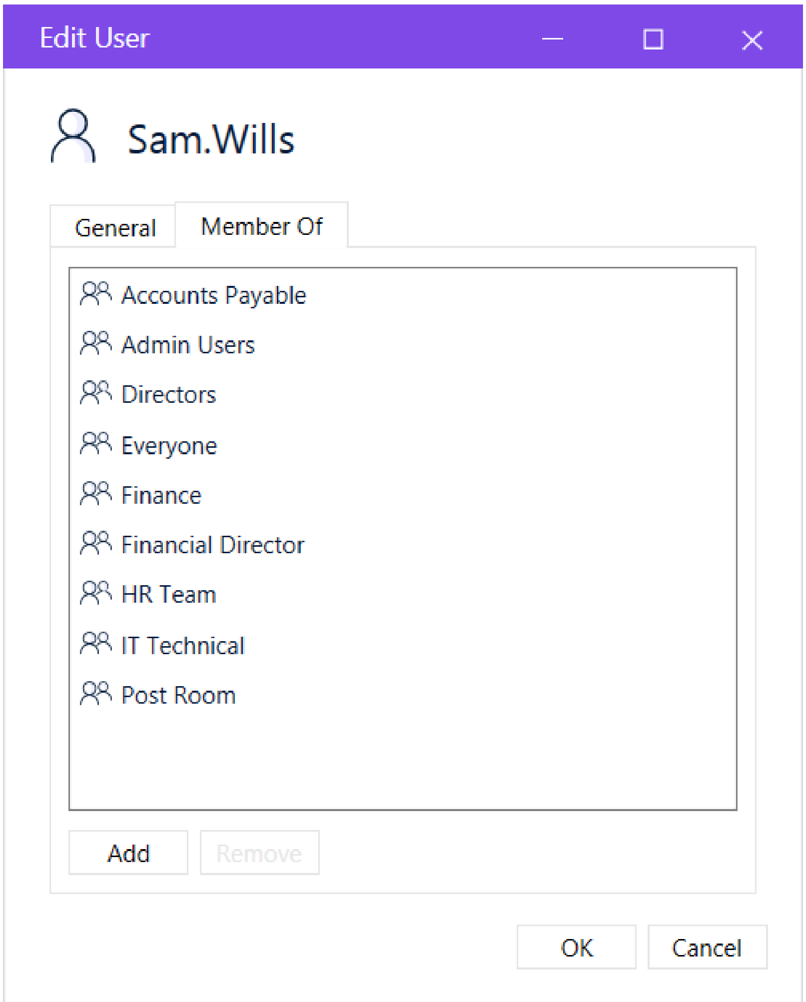
Option Name	Description	Required
User Name	The name that will be used to uniquely identify this User within Virtual Cabinet. Each User and Group must have a different name.	Yes
First name	The person's first name	
Last name	The person's surname	
New Password	Set a new password for this user. They will use this to log in to Virtual Cabinet. To ensure high security standards the password must be at least 12 characters but doesn't need to contain special characters. Once they have logged in, any User can change their own password by selecting Change Password from the options menu in the top-left of the Client application.	



<table>
<tr><td>Windows UPN</td><td>Windows ‘User Principal Name’ Links the User account to a Windows profile on the network. If a Windows account name is entered, such as UserName@MyDomain then Virtual Cabinet will attempt to log the person in as this User without showing a Login window.</td></tr>
<tr><td>Access Profile</td><td>A choice of Access Settings to apply to this User. You can use this to specify which part of the program the User has access to and the actions that this User can perform.</td></tr>
<tr><td>Intray Enabled</td><td>If disabled, a User’s Intray is inaccessible to all Users.</td></tr>
<tr><td>Use built in viewer for</td><td>Allows you to choose how the User will open files for viewing.
<table>
<tr><td>All documents</td><td>The Viewer will open all the document formats that it supports</td></tr>
<tr><td>Images only</td><td>The Viewer will only open image files. It will pass any other types of document to Windows to handle.</td></tr>
<tr><td>No documents</td><td>Don’t allow the viewer to open any documents.</td></tr>
</table>
By default, the Viewer will open all supported documents.</td></tr>
<tr><td>Don’t use viewer for</td><td>Enter semi-colon separated file extensions in this field for those files to open up in Windows, bypassing the Viewer.</td></tr>
</table>

Accessibility	Enables/Disables Accessibility and Automation. Disabling Accessibility can result in performance benefits, however this may cause problems with accessibility applications such as screen readers and tabtip on tablets.
Default Cabinet Indexing	Displays a list of the available Filing Cabinets in the system, allowing you to specify the default Filing Cabinet that will be selected on the User's Indexing tab in the Client Application.
Default Cabinet Searching	Displays a list of the available Filing Cabinets in the system, allowing you to specify the default Filing Cabinet that will be selected on the User's Search tab in the Client Application.
Supervisor	Specify the supervisor for this user. The supervisor gets special privileges over Tasks allocated to the user.
Show Email Suggestions	Display email suggestions in Outlook or not, see section on Email Suggestions to configure this.
Force Email indexing	Force the user to index emails when they are sent using Outlook.
Allow access via Virtual Cabinet Go	Enables/Disables access via the mobile app Virtual Cabinet Go.
Existing Devices	Lists all mobile devices registered with the Virtual Cabinet Go mobile app for this user. Revoke access to the app with the red cross next to each device, e.g. when a device is lost or stolen.

The 'Member Of' section of the window can be used to associate the User with Groups. The 'Members' list on the right-hand side lists all the Groups that this User is a member of. The 'Non-members' list on the left-hand side lists the other Groups that the User is not a member of.



You can add the User to a Group by the 'Add' button and selecting an applicable group. The Group will move into the 'Member Of' list and this User will become a member of the Group when you click 'OK' to save the edited User. Conversely you can remove a user from a Group by highlighting the Group and pressing the 'Remove' button.

Button	Description
Add	Opens a window allowing selection of Groups to add the user to.
Remove	Removes the User from all of the selected Groups in the Member Of list.

The 'OK' button is used to save the User and close the window. The window also has a 'Cancel' button. This button will revert the User to before you made any changes and will close the window. If you are cancelling a new User then it will not be created.

9 Groups

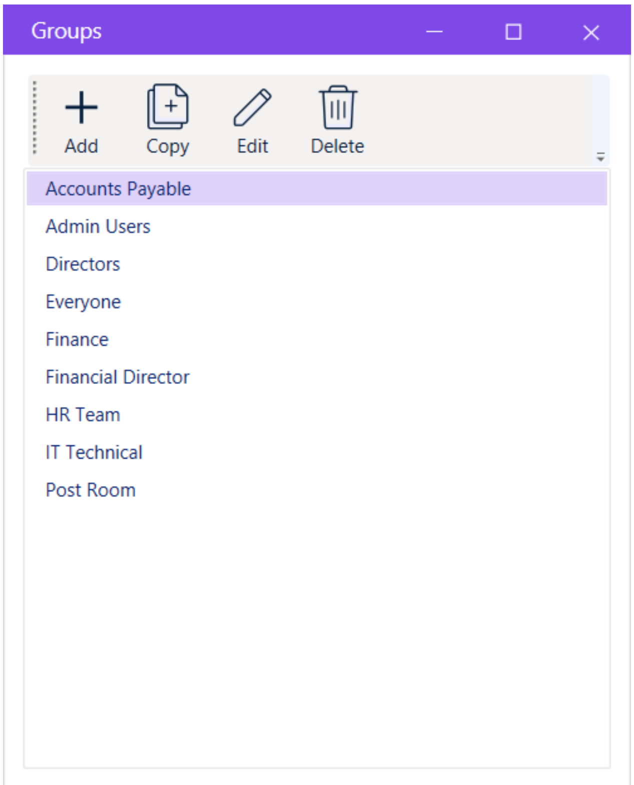
Users can belong to Groups. Groups provide an easy way to refer to multiple Users without having to edit each of them individually. Groups can be used to set permissions across a large number of Users simultaneously. A Group can also have its own Intray that is accessible by everyone belonging to that Group.

9.1 Opening the Groups List Window

The Groups list window can be accessed by clicking on the 'Groups' link in the Admin area of the Client application.

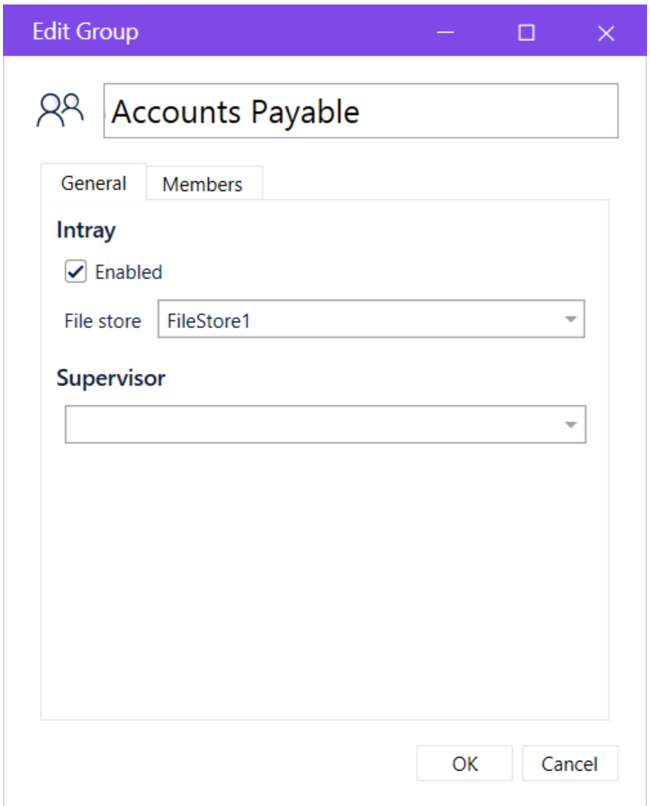
9.2 The Groups List Window

The Groups List window shows all of the available Groups in the system. If no Group is selected then only the Add button will be available.



You can click 'Add' to create a new Group. Alternatively, you can edit an existing Group by double-clicking on one or by selecting one and clicking the 'Edit' button.

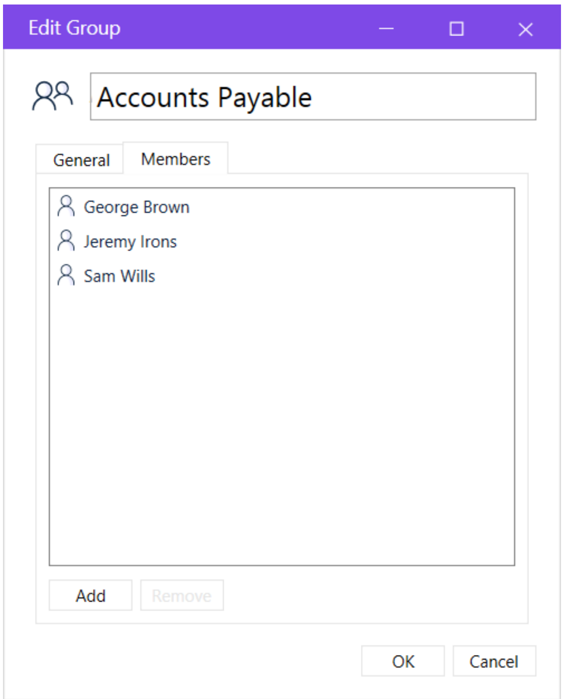
9.3 The Group Window



The 'General' Group window allows you to create a Group and assign Users to it.

Option name	Description	Required
Group Name	The name of the Group	Yes
Intray	If ticked, this Group will have a Group Intray in the Intray tab of the Client application. Users can place documents into a Group Intray and those documents will then be visible to any member of that Group who looks in the Group Intray.	
File store	The file store associated with this group	Yes
Supervisor	The Supervisor for this group	No

The ‘Members’ section of the window can be used to associate the Group with Users.



You can add a User to this Group by clicking the ‘Add’ button and selecting a user or users. The User(s) will be shown in the ‘Members’ list and the User will become a member of this Group when you click ‘OK’ to save the edited Group.

Button	Description
Add	Choose from a list of users to add as members into this Group.
Remove	Removes the selected User(s) in the Members list from the Group.

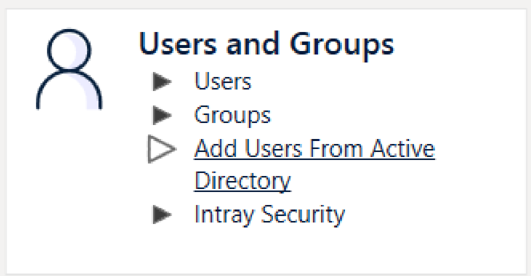
The ‘OK’ button is used to save the Group and close the window. The window also has a ‘Cancel’ button. This button will revert the Group to before you made any changes and will close the window. If you are cancelling a new Group then it will not be created.

10 Add Users from Active Directory

Virtual Cabinet enables User accounts to be imported quickly from Active Directory.

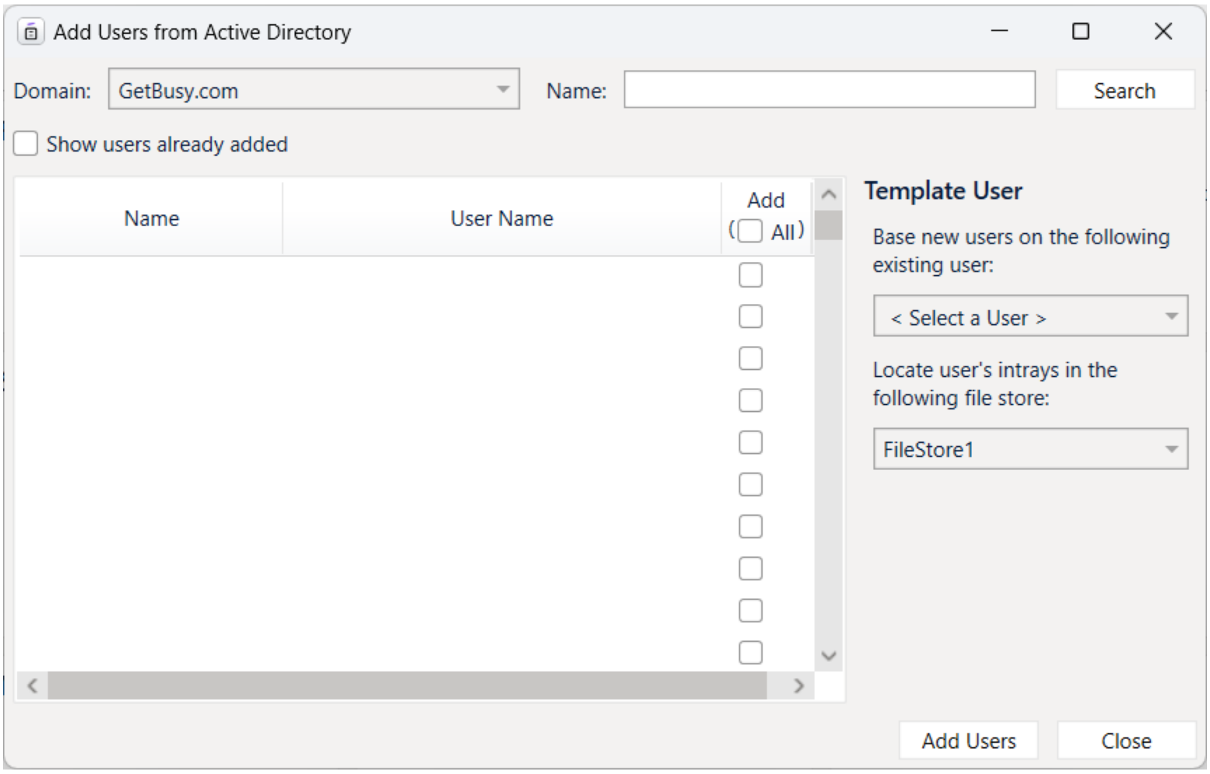
10.1 Opening the Active Directory Window

You can open the Add Users from Active Directory window by clicking the ‘Add Users from Active Directory’ link under the Users and Groups heading.



10.2 The Active Directory Window

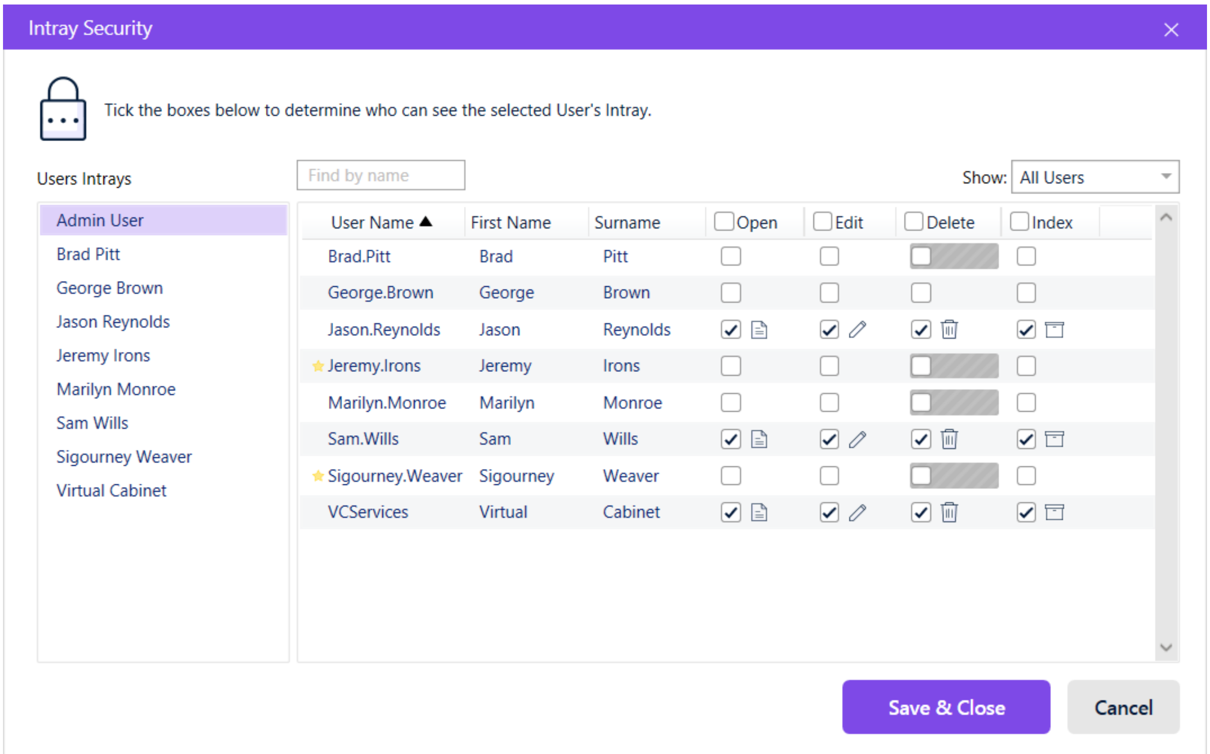
The Add Users from Active Directory window has a list of the user accounts that can be found in Active Directory. There is also a drop-down list of existing Virtual Cabinet Users that can be used as a template when creating the new User accounts. You can choose which file store you wish to locate the user's intrays. You can change the domain or search for a user by name in the search field at the top of the screen.



To add Users from Active Directory, tick the accounts that you want to import and select an existing User to act as a 'template'. When the 'Add Users' button is clicked, Virtual Cabinet will add all the ticked accounts as Users by copying the template User and changing their first name, last name and user name. The total number of Users will not exceed the maximum allowed by your licence.

11 Intray Security

An administrator can alter the security of any User's Intrays through the Intray Security option in the Admin tab. This will bring up the below window:

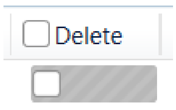


Select a user on the left hand side to change their security, then tick the boxes on the right to determine which users have access to the selected user's Intray. In the example above we are changing the security for Sam's Intray, and have given Admin full access over Sam's Intray, but Bob only gets Open access to documents in Sam's Intray.

You can search for a particular user in the grid on the right using the "Find by name" field, or you can see specific groups of users using the "Show:" drop down list.

For each user you can specify whether they have Open, Edit, Delete or Index rights over documents in the selected user's Intray using the tick boxes next to their name. Double clicking on a row will give that user full access by ticking all of their boxes.

If a user has a tick box that is greyed out then they do not have the security to access that feature in their own Intray, and so will not be able to do that action in the selected user's Intray even if the box is ticked.



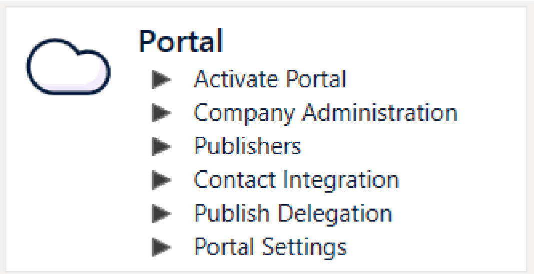
After you have changed a user's security they will receive a message in their Intray with this text: "An administrator has altered your Intray Security. You can review your security by clicking on Security above."

12 The Portal

Virtual Cabinet provides access to an online Portal. This Portal enables Virtual Cabinet Users to ‘publish’ documents, making them accessible to selected recipients outside of your organisation. Portal features are not enabled by default and must be ‘activated’ before they can be used. Once the Portal functionality is activated, Users can only interact with the Portal if they have been identified as ‘Publishers’.

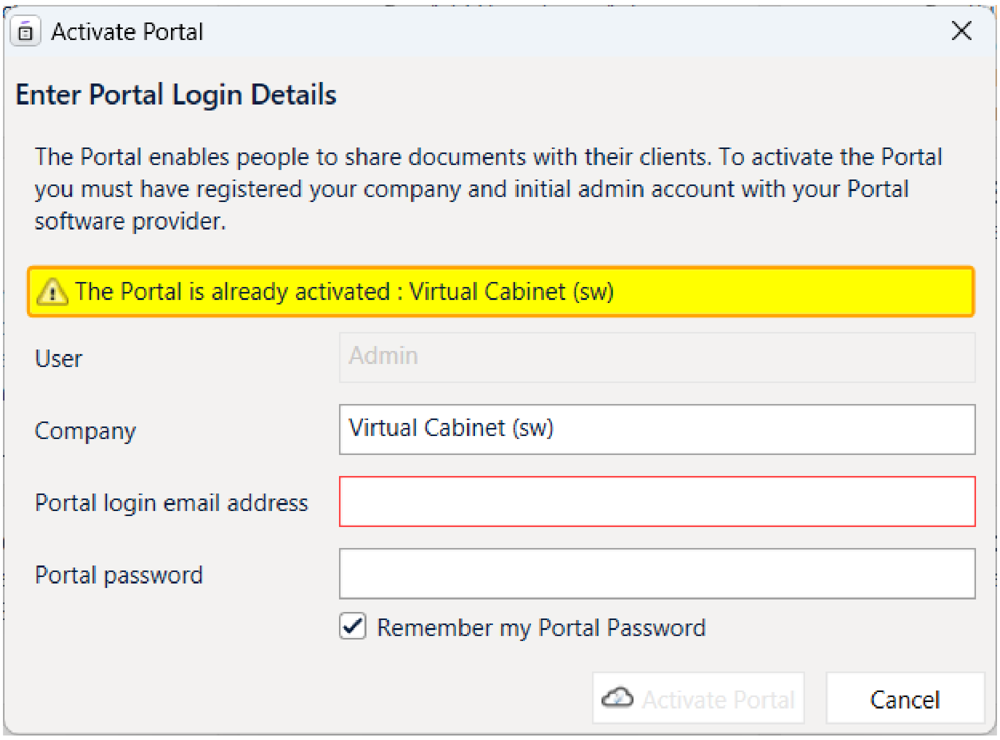
12.1 Opening the Activate Portal Window

The Activate Portal window can be opened by clicking on the link under the ‘Portal’ heading in the Admin area of the Client application.



12.2 The Activate Portal Window

The Activate Portal window is used to create the initial connection between your Virtual Cabinet system and the Portal.



To activate the Portal functionality within Virtual Cabinet, your company requires a pre-registered account with the Portal. You must also be registered as a user of the Portal. Please ensure that you have registered your company with your Virtual Cabinet supplier before continuing to activate the Portal functionality.

Option Name	Description	Required
User	The currently logged-in User. Once the Portal has been activated, this is the only User who will be able to administer Portal functionality within Virtual Cabinet.	Yes
Company	The name of your company. This must match the exact spelling of the company name that already been registered.	Yes
Portal login e-mail address	The e-mail address that is used to identify you on the Portal.	Yes
Portal password	The password that is used to authenticate you on the Portal.	Yes
Remember my Portal Password	If ticked, Virtual Cabinet will remember your Portal login password so you don't have to re-type it each time you access the Portal.	

When you have entered the required information, click the 'Activate Portal' button to enable the Portal publishing functionality for your Virtual Cabinet system.

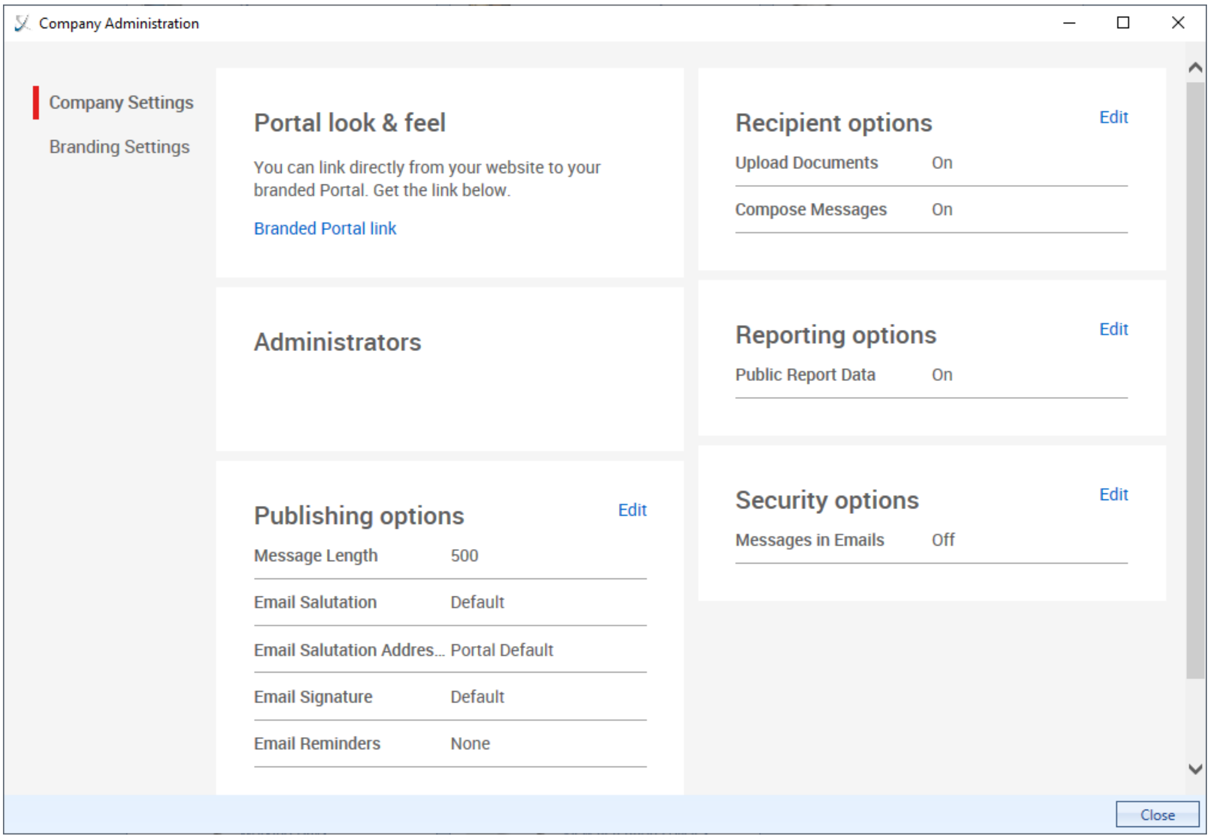
The window also has a 'Cancel' button. This button will close the window without activating any Portal functionality.

12.3 Company Administration

Administration of the Portal Company associated with Virtual Cabinet can be performed via 'Company Administration' by users who are configured as Portal Company Administrators.

Portal Company Administration allows you to change your Portal settings in relation to things such as Email Salutation format, Automated Reminder Frequency and Report Data visibility.

Further information can be found in the Virtual Cabinet Portal Configuration & Branding Guide.



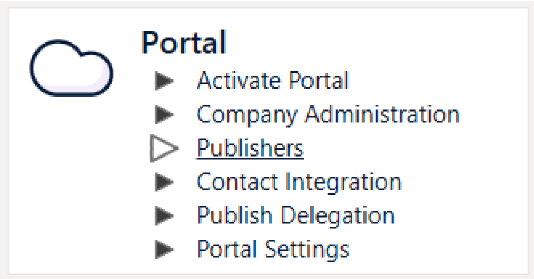
12.4 Publishers

'Publishers' are Virtual Cabinet Users that can use the Portal functionality in Virtual Cabinet. Publishers can 'publish' documents to selected recipients and 'retract' documents that have already been published. Publishers can also view the full audit history of documents that have been published.

For more information about Publishers and published documents, please refer to the 'Document Actions' section of the Virtual Cabinet User Guide.

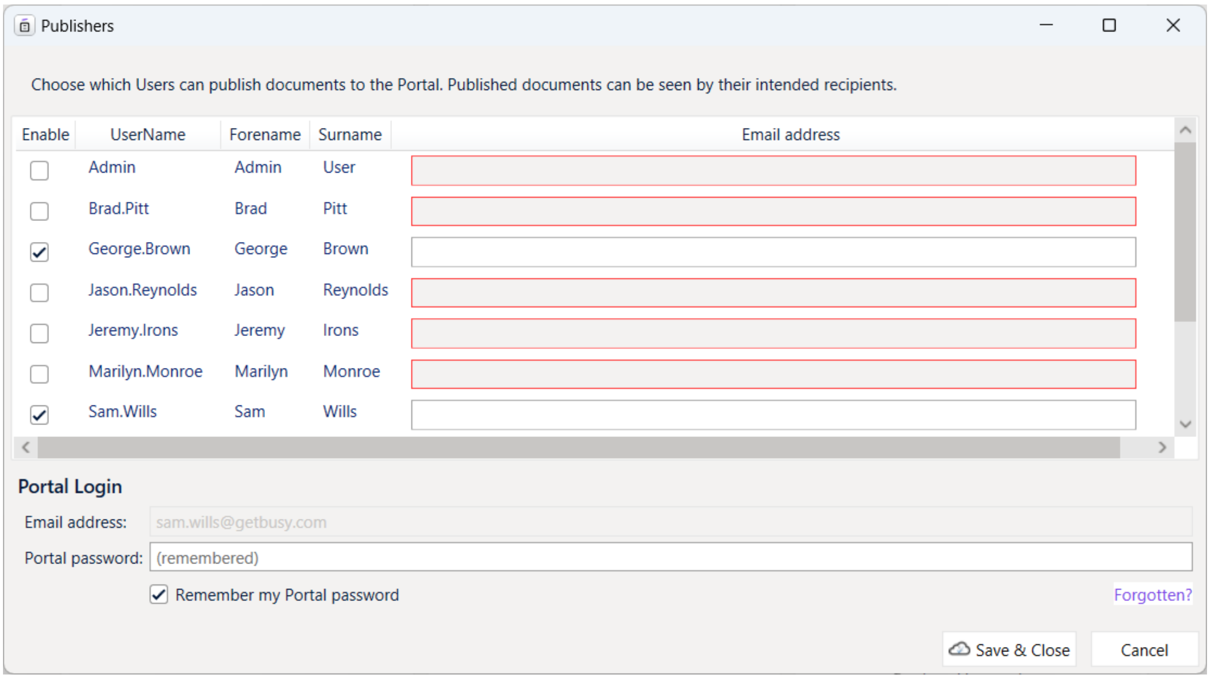
12.4.1 Opening the Publishers Window

You can open the Publishers window by clicking on the 'Publishers' link under the 'Portal' heading in the Admin area of the Virtual Cabinet application.



12.4.2 The Publishers Window

The Publishers window lists all the Users in the Virtual Cabinet system and enables individual Users to be identified as Publishers.

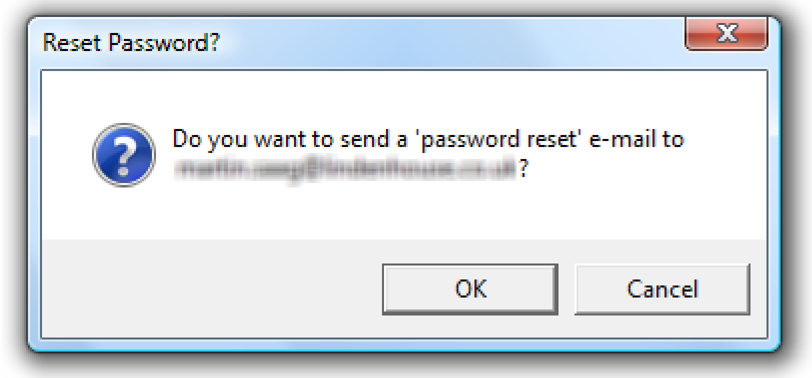


Column Name	Description
Enable	Enables the User as a Publisher in Virtual Cabinet.
User Name	The User name that uniquely identifies the User in this Virtual Cabinet system.
Forename	The first name of the User.
Surname	The surname of the User.
Email address	The e-mail address of the Publisher. The Portal will send a registration e-mail to this address, enabling the recipient to access documents that your company has published online. This e-mail address is used to identify the Publisher on the Portal and cannot be edited while the Publisher is enabled. This box will be highlighted in red if the Publisher is enabled and the e-mail address is invalid.

The Publishers window interacts with the Portal to add or remove Publishers. Valid Portal login credentials are required whenever Virtual Cabinet contacts the Portal.

Please note that only the Publisher who originally activated the Portal will have the Portal administration permissions required to add or remove other Publishers.

Option	Description
E-mail address	The e-mail address that is used to identify you on the Portal. This is the e-mail address associated with your User account in Virtual Cabinet.
Portal password	A text box that allows you to enter your Portal password. This is the same password that you use on the Portal website. If you have previously typed a password, this box will say "(Remembered)" to indicate that Virtual Cabinet has found a saved password. You can overwrite a saved password by typing your new password in the box.
Remember my Portal password	If ticked, the Portal password that you type will be remembered the next time you use Portal functionality inside Virtual Cabinet.
'Forgotten?' link	Opens a new window asking you to confirm that you want the Portal to send you a 'password reset' e-mail. The Portal will send the e-mail to the e-mail address associated with your User account in Virtual Cabinet.



The Publishers window also has a 'Save & Close' button and a 'Cancel' button. Click 'Save & Close' to update the Portal and enable any new Publishers. Alternatively, click 'Cancel' to close the window without saving any changes.

12.5 Portal Contact Integration

Portal Contact Integration can provide a faster, more powerful and more tightly integrated method for publishing documents to the Virtual Cabinet Portal.

The functionality is closely aligned to Intelligent Indexing and emulates much of the same behaviour and traits.

It is strongly recommended that you read this section and the Intelligent Indexing section in their entirety before deciding to implement Portal Contact Integration. .

Portal Contact Integration can be used to provide the following functions:

- Suggest Lists of Portal Recipients populated from other line of business systems
- Suggest Lists of Portal Recipients directly relevant to the selected document from other line of business systems

In order to configure Portal Contact Integration, you must have knowledge of and access to data stored in, or via, Microsoft SQL Server.

12.5.1 Portal Contact Integration: Things you will need to know

In order to implement Portal Contact Integration, there are a number of things you will need to know about before you get started.

12.5.1.1 Microsoft SQL Server Knowledge

Portal Contact Integration makes use of Microsoft SQL Server and T-SQL data access and retrieval functionality, so if this is an area you don't know too much about, then you might want to ask your Virtual Cabinet Supplier to give you some assistance and get you started.

12.5.1.2 Microsoft SQL Server Data

Intelligent Indexing *only* works with Microsoft SQL Server. You *cannot* access data using other database engines like MySQL, Oracle, XML etc., unless you can create reliable Linked SQL Servers to these databases using the required drivers and query those linked server databases use standard Microsoft SQL Server T-SQL.

12.5.1.3 Connection String

You will need to configure a Database Connection in order to use Portal Database Integration Contacts.

12.5.1.4 Intelligent Indexing SQL Command

You will need to configure the Intelligent Indexing SQL Commands.

The SQL Command is a Microsoft T-SQL SELECT Statement that returns a column of data that you wish to use for your list.

Basic Example:

Select Email, Title, Forename, Surname from Contacts

The above query will return all values from the Email, Title, Forename and Surname columns in the Contacts table or view within the database referenced by the connection string. Columns must be returned with these specific names: Email, Title, Forename and Surname

12.5.2 About Portal Contact Integration

Portal Contact Integration is designed to allow you to make use of existing contact data stored in other systems in conjunction with the Virtual Cabinet Portal.

When you publish a document to the Portal, you need to enter a recipient email address, title, forename and surname. Virtual Cabinet allows you to enter this information manually and remembers it for you by default. If you do not know the email address you may need to go and look it up in another system such as a Client or Supplier management database.

Portal Contact Integration can be configured to present you contacts from other systems directly in the Virtual Cabinet Portal publish window so that you don't have to go into another system to find or check an email address.

Taking a step further, Portal Contact Integration can be configured to show you contacts from other systems in the context of the document you have chosen to publish to the Portal.

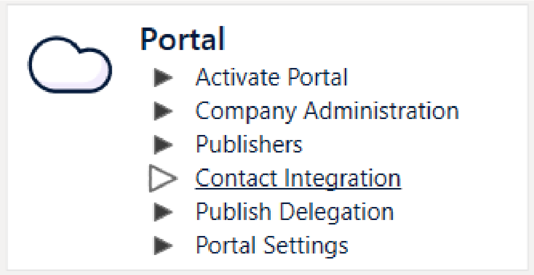
Example:

You use a central database system to manage all of your client information, including all the individuals you deal with for each client and their associated email addresses ("ClientDB"). You have a client record in ClientDB called "Everything Electrical". There are three people your business deals with at Everything Electrical on various different matters and they all have a contact record in ClientDB that contains their email addresses.

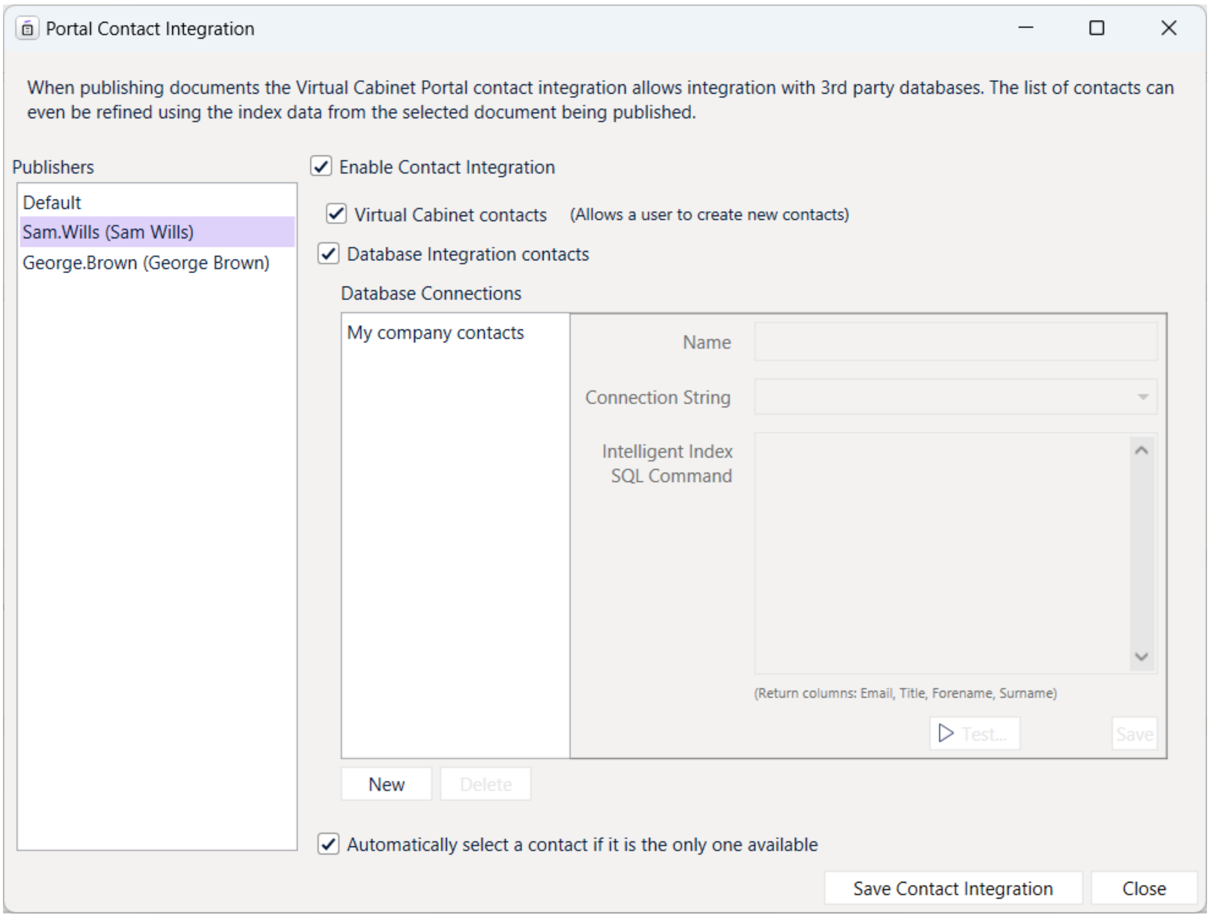
When you select to publish a document relating to Everything Electrical to the Portal in Virtual Cabinet, you will be presented with the list of the three client contacts stored in ClientDB. Nice!

12.5.3 Enabling Portal Contact Integration

In order to configure Portal Contact Integration, you must click the Contact Integration link in the Portal section of the Admin tab.



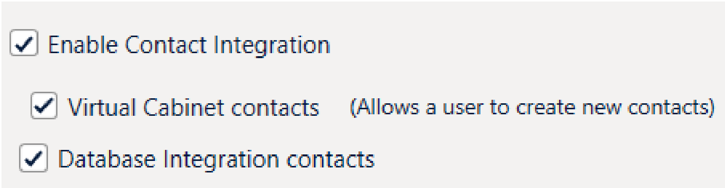
This will open the following Portal Contact Integration Window.



Option	Description
Publishers Pane	The Publishers Pane on the left of the window lists a Default option and all individual users that are activated to use the Virtual Cabinet Portal in the Publishers Window. Contact Integration can be configured as a Default for all users and/or specific users. This allows you to have different contact integration for different users. You must select an item in the list before proceeding.

Contact Integration

In order to configure Contact Integration you must tick the Contact Integration checkbox to enable further options.



Virtual Cabinet Contacts

If ticked, the option of Virtual Cabinet Contacts will allow Portal Users to enter any recipient information in the Portal Publish window and will remember each recipient entered on a per user basis.

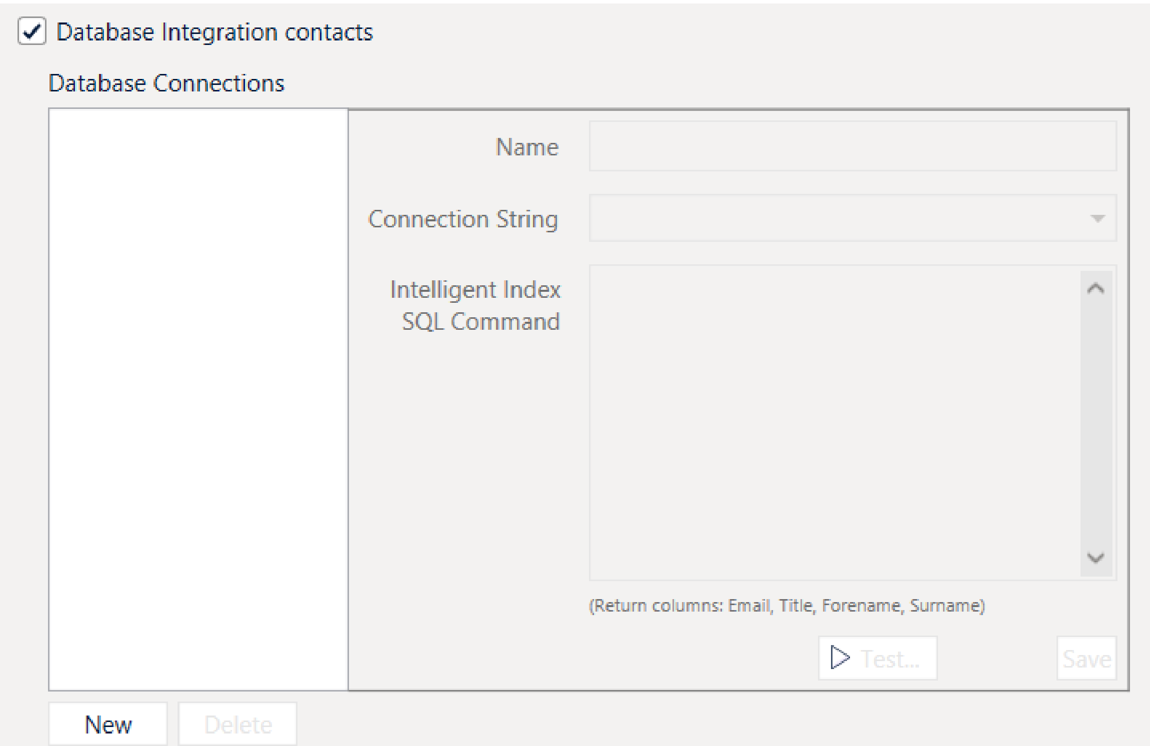
Database Integration Contacts

If ticked, the option of Database Integration Contacts will allow you to configure database connections to fetch contact information from other databases and display that information as available recipients in the Portal Publish window.

You can use both Virtual Integration Contacts and Database Integration Contacts together if you wish.

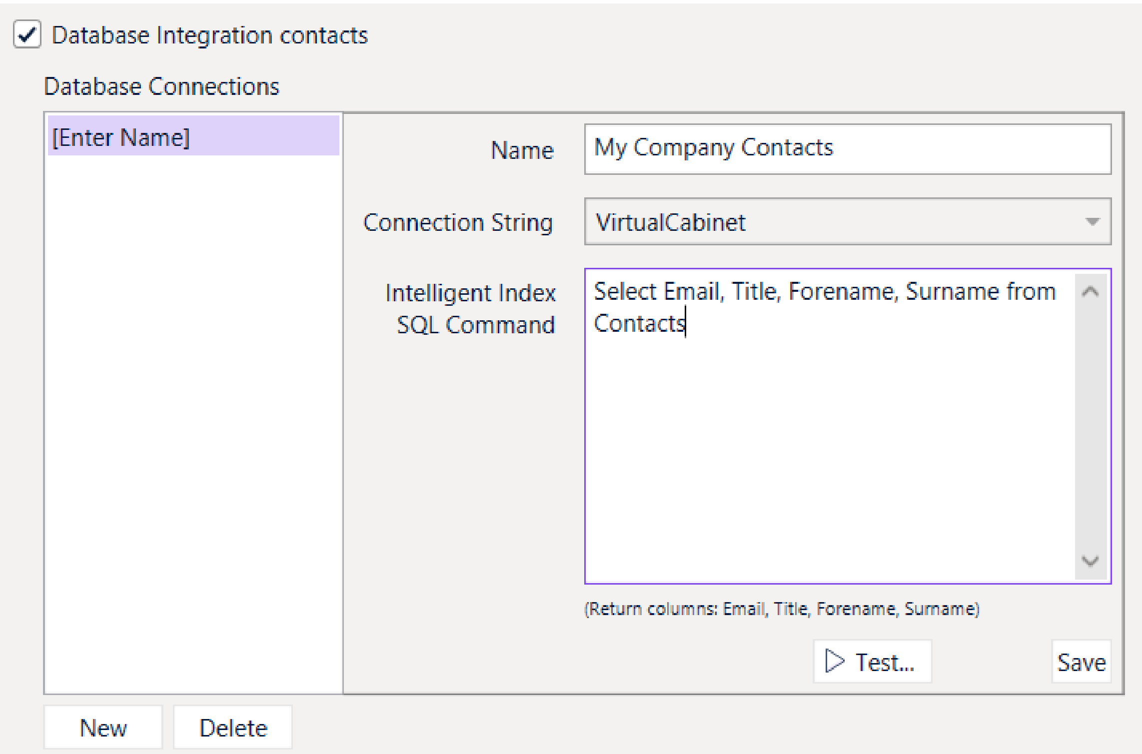
12.5.4 Configuring Database Integration Contacts

Before starting to configure Database Integration Contacts it is advisable to fully understand which databases you are connecting to and how you are going to query they to get the information you need.



Option	Description
Database connections	You can configure connections and queries on any number of external databases. All of the results from all database will be concatenated together and presented to the related user(s) in the Portal Publish Window.
New	The New button begins the process of configuring a new Database connection. And enables the configuration fields to the right of the database connections box.
Delete	The Delete button allows you to select and delete an existing Database connection.
Name	Allows you to enter a descriptive name for the connection, such as ClientDB.
Connection String	The Database Connection to the target database
Intelligent Index SQL Command	The Intelligent Indexing SQL Command to return contact information. The Query must return four columns: Email, Title, Forename, Surname.
Automatically choose contact if only 1 available	Is ticked, the Portal Publish window will automatically select a recipient if there is only one returned in the recipient list.
Test	Opens up a window that allows you to Test your SQL Command with your chosen Connection String.
Save	Saves the configuration.

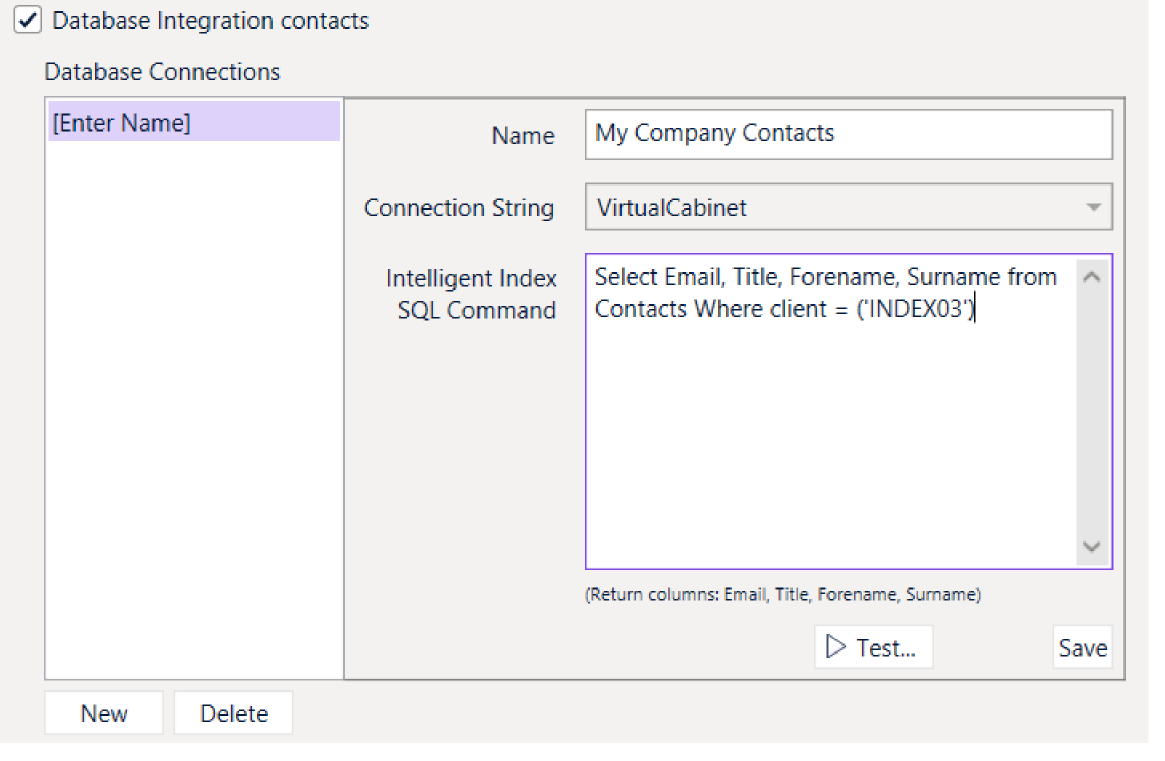
The configuration shown below is a simple example that connects to a Contacts Database and performs a Select query on the contacts table.



Important: It is not advisable to return large unfiltered contact lists to portal users. This will have an adverse impact on both performance and user experience.

You should look to automatically filter the list of recipients in the context of the document they are publishing. This can be achieved by using the index information for the selected document in the Intelligent Index SQL Command. This will most likely make the SQL Command more complex and may force you to join multiple tables or build a suitable database view in SQL Server.

In the simple example below, the Contacts table already has a column that contains the Client in the same format as Virtual Cabinet. INDEX03 is used for Client in the Virtual Cabinet Clients Filing Cabinet in this scenario. The scope of what can be achieved with the Intelligent Indexing SQL Command is very powerful. Please read the Intelligent Indexing section of this document for further information.



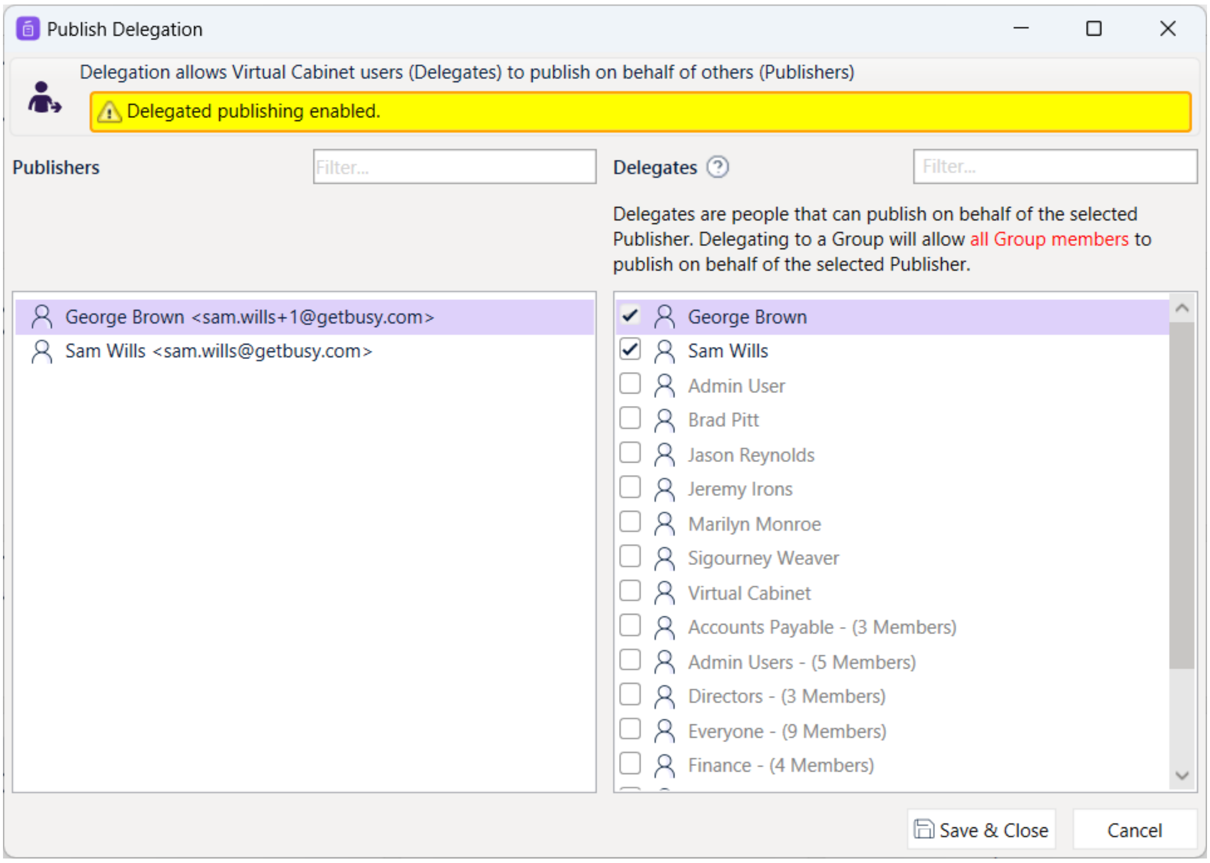
Note: Portal Contact Integration makes use of the Intelligent Indexing Cache

12.6 Publish Delegation

Publish Delegation allows you to grant Portal Publishers the rights to Publish on behalf of other Publishers either in Virtual Cabinet or the Bond Application (see the Virtual Cabinet Integration Guide for further information).

The Publish Delegation window contains two lists. On the left is a list of Portal Publishers. On the right is a list of Delegates.

In order to grant a delegate the rights to publish on behalf of another Portal publisher, select the Publisher on the left and the tick the permitted Delegates on the right.



When publishing to the portal a permitted delegate is able to select from a list of publishers. See the Virtual Cabinet User Guide for more information.

If you are writing an integration with Virtual Cabinet using the Bond application, it should be noted that there is an additional licensing model available.

By default, Publish Delegation allows one publisher to publish on behalf of another. Extended Publish Delegation is a licensing option for the Portal that allows non-publishers to publish documents on behalf of a publisher, but only via an Integration based on the Bond Application. When Extended Publish Delegation is enabled, the Publish Delegation window in Virtual Cabinet shows all Virtual Cabinet users in the list. If you are a Virtual Cabinet Integration Partner, please contact your Account Manager for further information about Extended Publish Delegation.

12.7 Configure Portal Settings

Settings relating to inbound documents, automatic document retraction and file naming rules are available for configuration as described below.

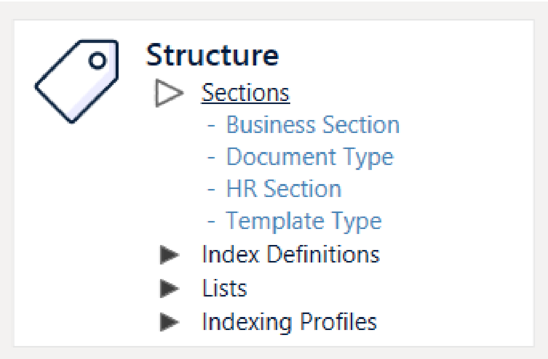
Option	Description
Inbound Document Intray	Specify the intray to which the portal documents arrive. Documents are returned to the Portal Publisher by default or a group intray can be specified.
Portal Document Auto-Retract	Specify if documents published to the portal are retracted automatically after a specified period of time (days, weeks or months). Set 'Optional' to allow publishers to change the retraction time when they publish. **Note:** If the same document is published to a different recipient at a later date the document Auto-retract time of is set again independently for that recipient.
Portal Document Retracts	Specify when documents published to the portal are retracted. If Auto-Retract is set to 'optional' then publishers can change the retraction time when they publish.
Portal File Name Rule	Specifies the default file name that will be suggested when a User chooses to publish a document to the Virtual Cabinet Portal. This will only apply if the Portal has been activated for this Virtual Cabinet system. This setting can be left blank to give the file a default name. For information on how to specify a File Name Rule, please see the File Name Rules section below.

13 Sections

Sections are used to specify the types of document that can be indexed into a given Filing Cabinet. This helps to keep your documents organised when they are stored in Virtual Cabinet.

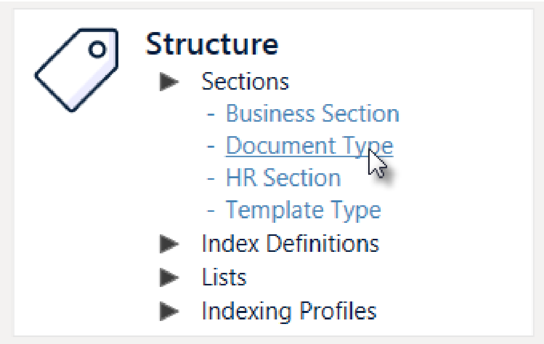
13.1 Opening the Sections List Window

You can open the Sections list window by clicking on the 'Sections' link under the 'Structure' heading in the Admin area of the Client application.



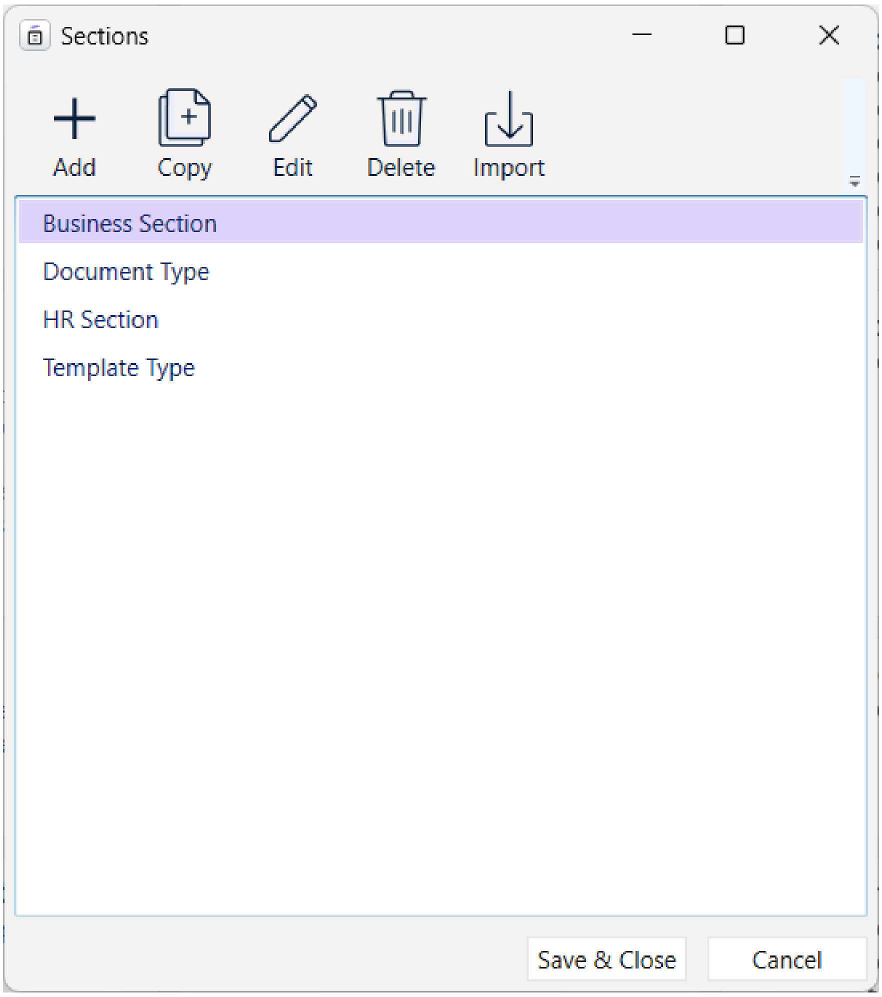
13.2 Direct links to Sections

You can go directly to an existing Section by clicking on the link under the 'Structure' heading in the Admin area of the Client application.



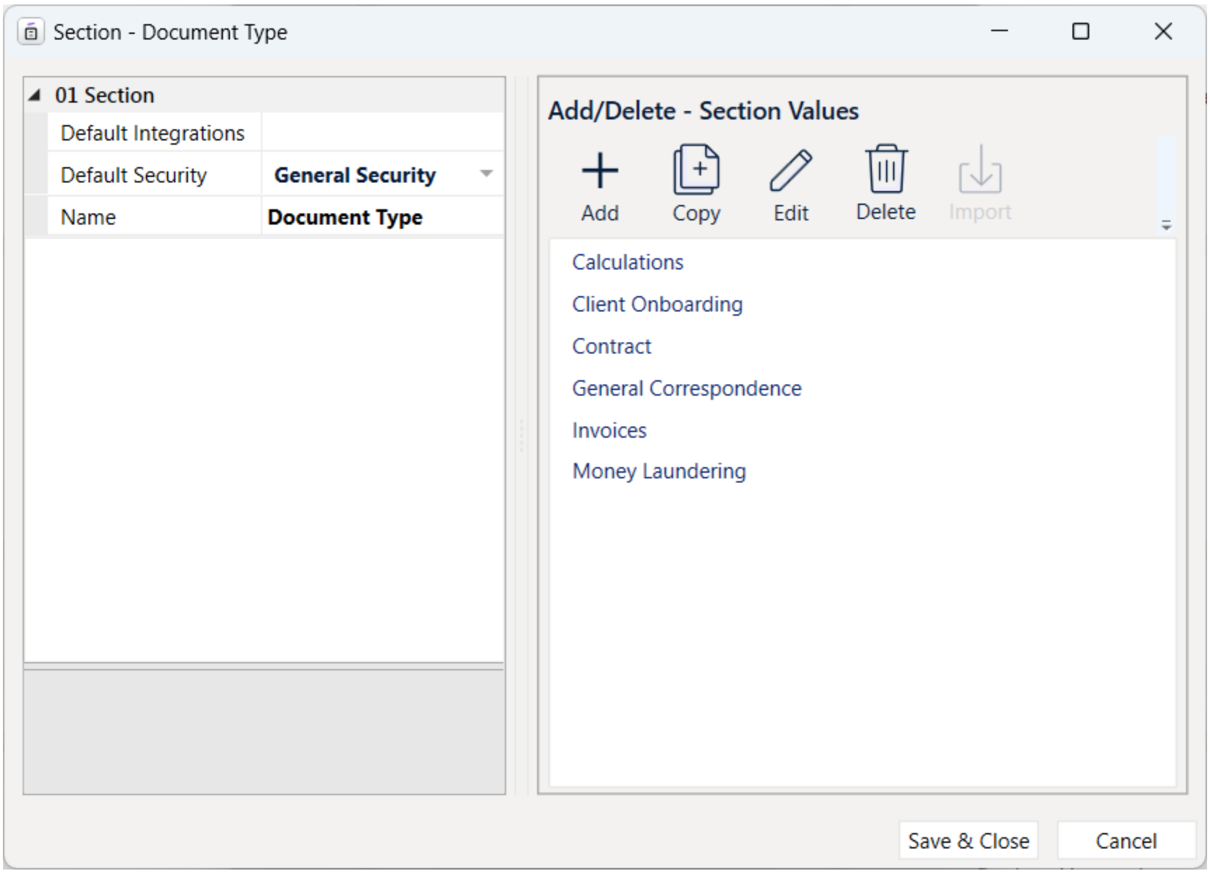
13.3 The Sections List Window

The Sections list window shows all of the available Sections in the system. If no Section is selected then only the Add button will be available.



You can click 'Add' to create a new Section. Alternatively, you can edit an existing Section by double-clicking on one or by selecting one and clicking the 'Edit' button.

13.4 The Section Window



The Section window is used to define the different types of document that can be stored in a Filing Cabinet when it is associated with this Section.

Option name	Description	Required
Default Integrations	The name of any integration that is going to be applied by default. If specified, the integrations will be applied to Section Values in this Section.	
Default Security	A choice of the Security Profiles in the system. The chosen Security Profile will be used by default when indexing documents under this Section. This is only a default; Users are able to choose a different Security Profile when indexing a document if they have 'Override Default Security' ticked in their Access Setting.	Yes
Name	The name of this Section.	Yes

The 'Add/Delete – Section Values' part of the window enables you to add Section Values to this Section.

The 'Save & Close' button is used to save the Section and close the window.

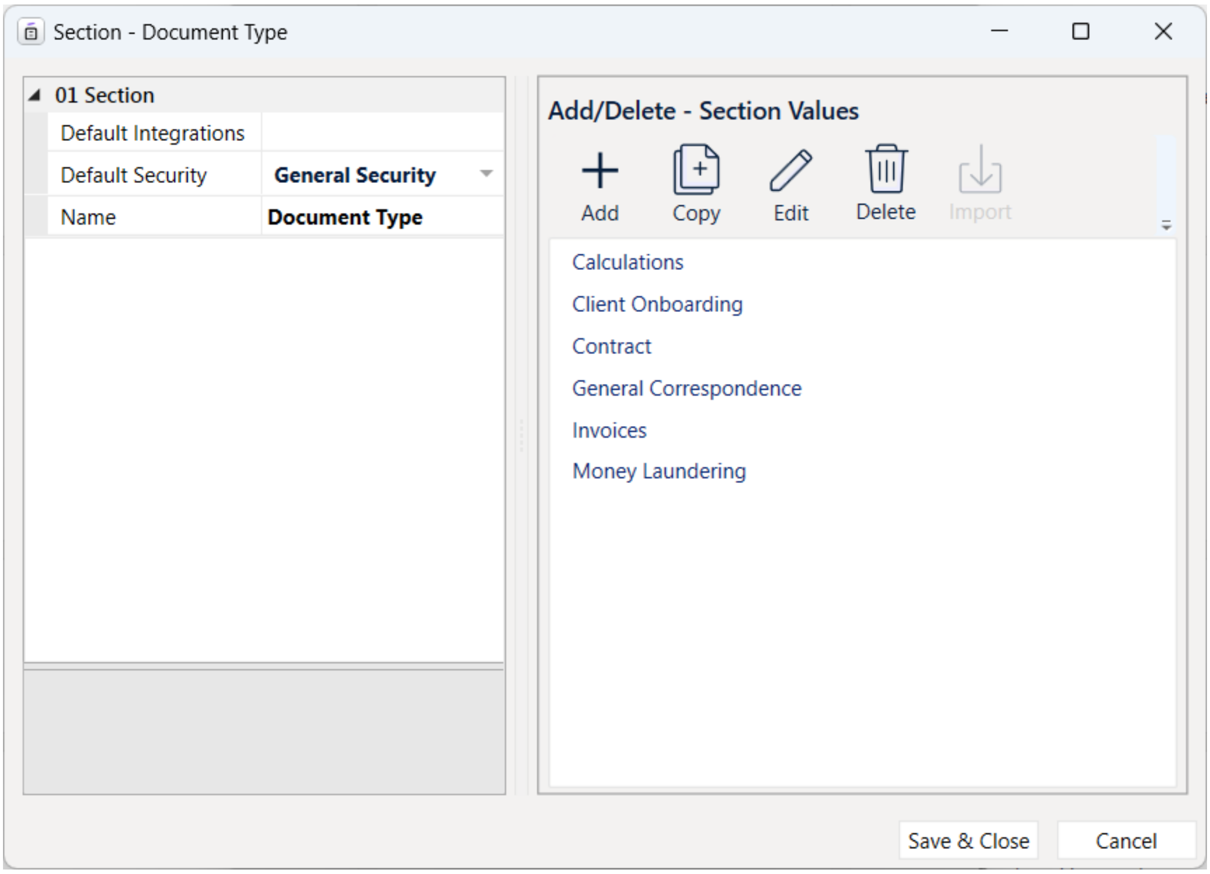
The window also has a ‘Cancel’ button. This button will revert the Section to before you made any changes and will close the window. If you are cancelling a new Section then it will not be created.

13.5 Section Values

A Section Value is a type of document that is allowed within a Section. A Section can contain any number of Section Values but a Section Value may only belong to one Section.

13.6 The Section Values List

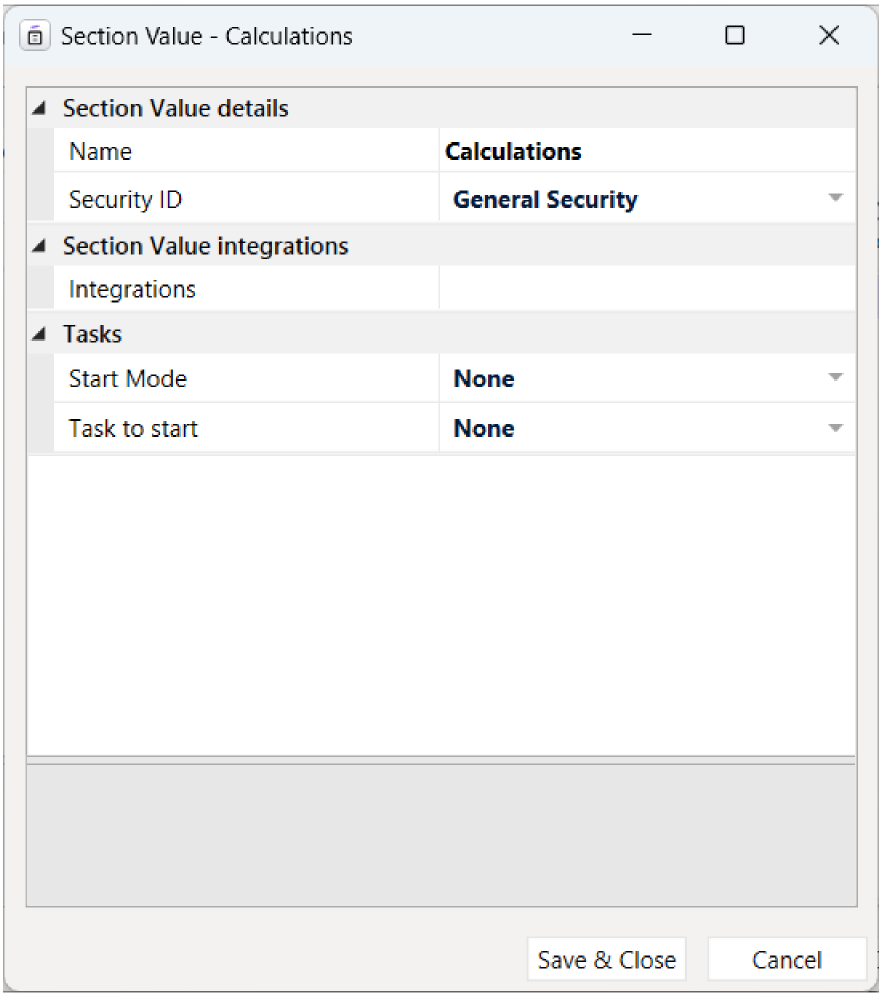
The ‘Add/Delete – Section Values’ part of the window enables you to add or delete the Section Values within a Section. The list shows the current Section Values for this Section. If no Section Values are selected then only the Add button will be available.



You can add a new Section Value by clicking the ‘Add’ button. Alternatively, you can edit an existing Section Value by double-clicking on it or by selecting it and clicking the ‘Edit’ button.

13.7 The Section Value window

The Section Value window allows you to create a Section Value with a name and Security Profile.



Option name	Description	Required
Name	The name of this Section Value.	Yes
Security ID	A choice of the Security Profiles in the system. The chosen Security Profile will be used by default when indexing documents under this Section Value. If specified, this Security Profile will override the Security Profile suggested by the Section. This is only a default - Users are able to choose a different Security Profile when indexing a document.	
Default Integrations	The name of any integration that is going to be applied by default. If specified, the integrations will be applied to this Section Value.	
Tasks To Start	Select a task to be started when a document is indexed using the section value	

Start Mode	Select a start mode for the task. You can choose to 'Always start this task' or 'Allow the user to opt out'

The 'Save & Close' button is used to save the Section Value and close the window.

The window also has a 'Cancel' button. This button will revert the Section Value to before you made any changes and will close the window. If you are cancelling a new Section Value then it will not be created.

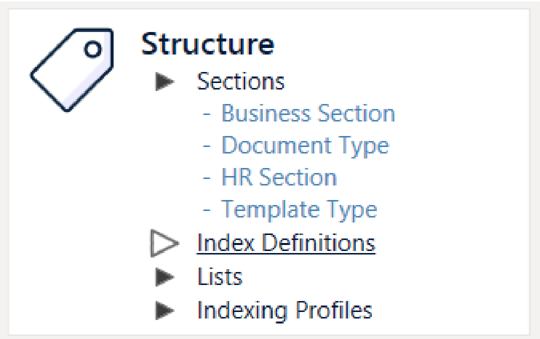
14 Index Definitions

When a document is added into Virtual Cabinet, it can be stored along with pieces of 'index' information. This extra information makes documents easy to find. The process of adding indexes to a document is called 'indexing' the document.

Index Definitions are used to define the different types of information that a document can be indexed against. Index Definitions can be set up so that a document has different indexes depending on the Section that the document belongs to or the Filing Cabinet that the document is being indexed into.

14.1 Opening the Index Definitions Window

You can open the Index Definitions window by clicking on the 'Index Definitions' link under the 'Structure' heading in the Admin area of the Client application.



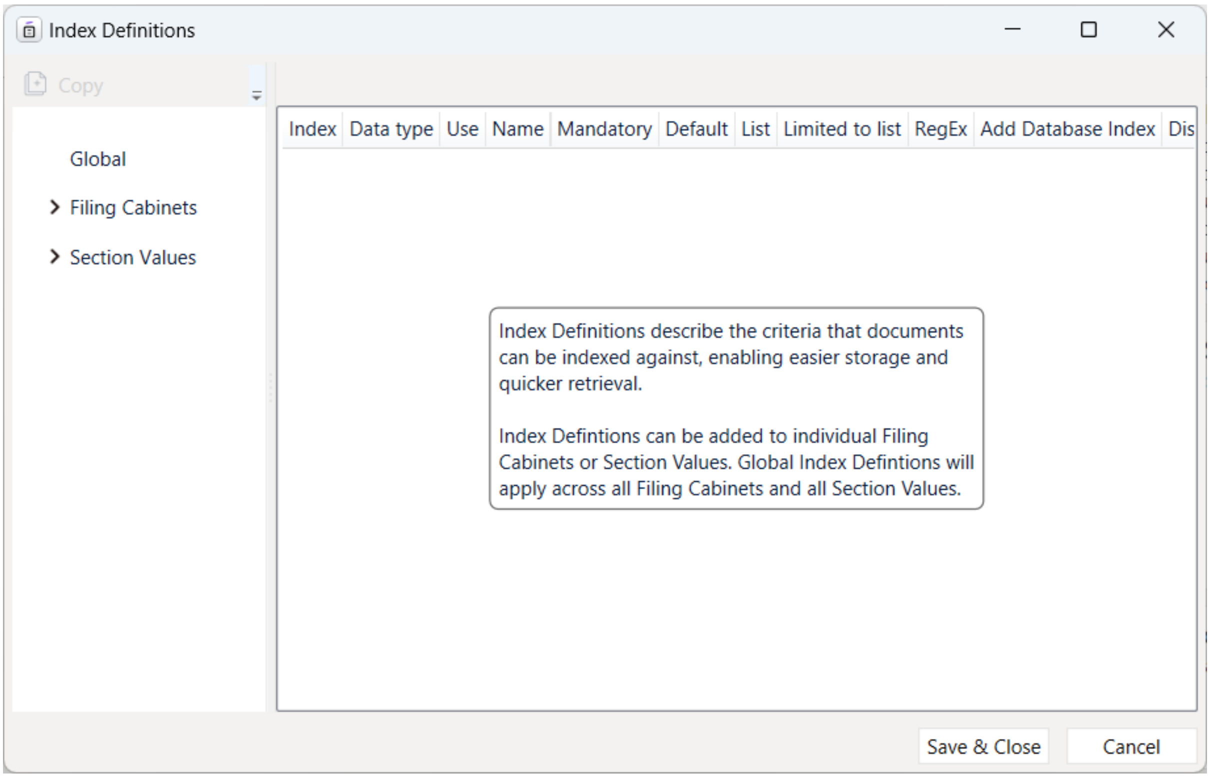
14.2 The Index Definitions Window

The Index Definitions window contains two main panels: The panel on the left is used to select between 'global' Index Definitions and those that affect specific Filing Cabinets or Section Values. The panel on the right is used for displaying and editing the selected Index Definitions.

The window also has an 'Apply Changes' button and a 'Close' button.

You can click 'Apply Changes' to any time to save the changes you have made and apply them to the system.

The 'Close' button will close the window. This action will not save the any changes – To save your changes, click 'Apply Changes' before closing the window.



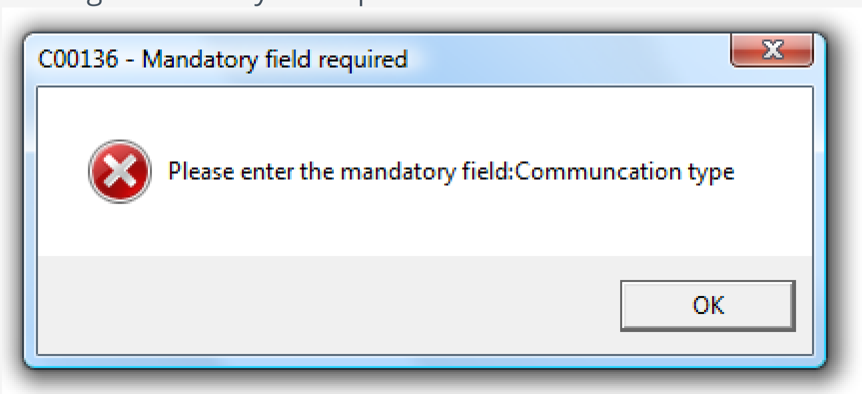
14.3 Selecting Index Definitions

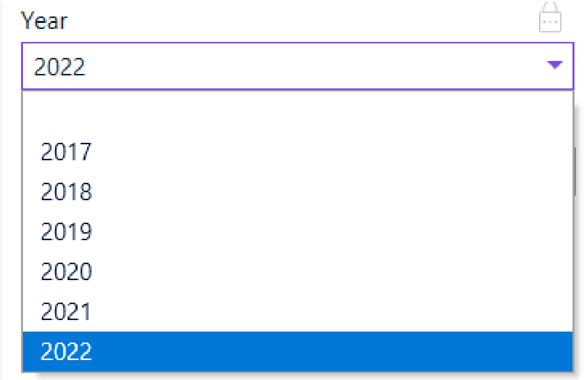
The left-hand panel allows you to select Index Definitions.

Option	Description
Global	Global Index Definitions apply to all documents. You can create up to ten text indexes, up to one number index and up to one date index.
Filing Cabinets	Lists each Filing Cabinet in the system. Each Filing Cabinet can have separate Index Definitions assigned to it. These Index Definitions will apply to all documents that are indexed into the Filing Cabinet. You can create up to 16 text indexes, up to two number indexes and up to two date indexes.
Section Values	Lists each Section in the system, with each Section listing all available Section Values. Each Section Value can have Index Definitions assigned to it. Index Definitions are defined at the Section level and can then be enabled or disabled at the Section Value level. These Index Definitions will apply to all documents that have the Section Value set. You can create up to 11 text indexes, up to two number indexes and up to two date indexes.

14.4 Editing Index Definitions

The right-hand panel enables you to edit the selected set of Index Definitions. Each row in the table corresponds to an Index Definition.

Column Name	Description
Index	A fixed number that shows the index number of this Index Definition.
Data Type	A fixed label that shows the type of data this Index Definition can hold. It will be one of either Text, Number or Date.
Use	If ticked, this Index Definition will be enabled. Otherwise it will not be used by the system. This will automatically become ticked if you begin typing a Name and will automatically untick if you clear the Name. You can untick this box to delete the Index Definition next time you click 'Apply Changes'.
Name	Allows you to type a name for this Index Definition. The user will see this name while they are indexing documents.
Mandatory	If ticked, the User will have to enter data for this Index Definition in order to index the document. While indexing, mandatory fields will be outlined in red if they have not been completed. If the User does not complete a mandatory field, they will see a message when they attempt to index the document. 
Default	An optional default value for the Index Definition. Use the text TODAY in date indexes to display today's date as the default value. Use the text ORIGINALFILENAME in text indexes to display the Original File Name of the document as the default value.
List	An optional choice of Lists. If you choose a List then the values in that List will appear in a dropdown box for the User to pick from. If no List is selected then the User will be able to enter any valid data.

	
Limited to List	If ticked, the user will be restricted to choosing from the specified List of values.
RegEx	Allows you to write a Regular Expression rule to help ensure that the User enters valid data.
Add Database Index	If ticked, a database Index will be added to the corresponding field in the Virtual Cabinet database. This will make it faster to search for values in this field when using the Search Criteria pane in the search tab
Display Group	The Display Group can assist in dictating the order in which Index fields should appear in the indexing screen. There are three display groups, 1-3, that are ordered from top to bottom: 1 will appear first, 2 will appear second and 3 will appear third. If you want your indexes to appear at the top of the index field list in the indexing screen, you need to put then in Display Group 1. If there are multiple index fields within a Display Group, the order of these fields will be dictated by their corresponding index names e.g. INDEX02 will appear before INDEX03 etc. By default, Section Value Indexes will appear first (Group 1), Cabinet Indexes will appear second (Group 2) and Global Indexes will appear third (Group 3).
Intelligent Indexing Connection String	Specifies the Database Connection to use for the Intelligent Indexing SQL Command See Intelligent Indexing for more information.
Intelligent Indexing SQL Command	A Microsoft SQL Server T-SQL SELECT statement that is executed to provide possible indexing values for the index field. E.g. Select JobNumber from Jobs where (ClientName = 'INDEX02') See Intelligent Indexing for more information.

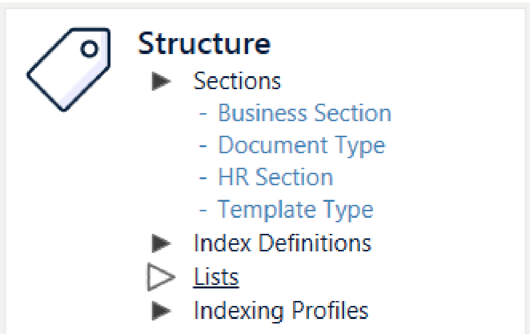
Intelligent Indexing Auto Select	If set to 'Select Single', an Intelligent Indexing SQL Command returning a single value will automatically be selected during the document indexing process. If set to 'Select First', the first row returned by an Intelligent Indexing SQL Command will be selected automatically during the document indexing process. If set to 'Select None', no automatic selection will be made during the document indexing process.

15 Lists

Lists enable you to define a set of options for other users to pick from when indexing a document.

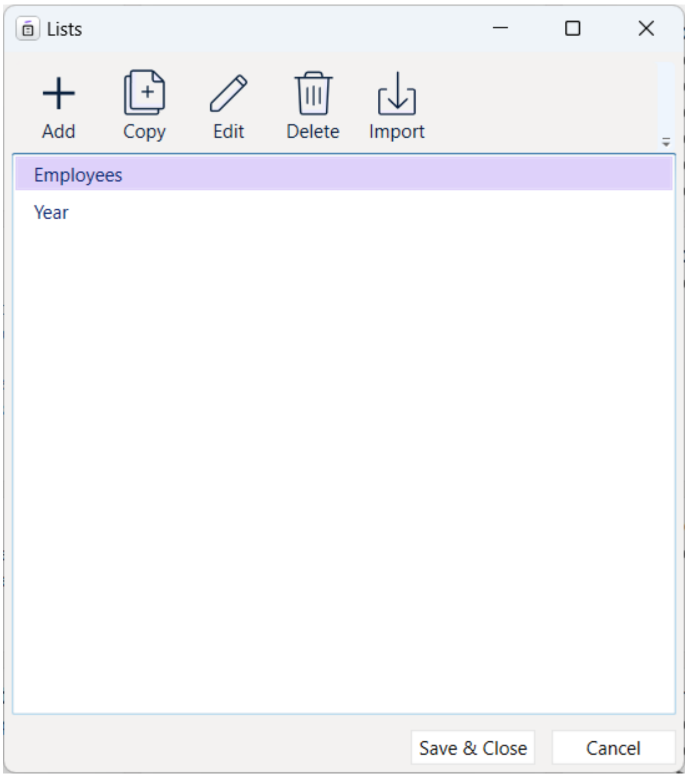
15.1 Opening the Lists Window

You can open the Lists window by clicking on the 'Lists' link under the Structure heading in the Admin area of the Client application.



15.2 The Lists Window

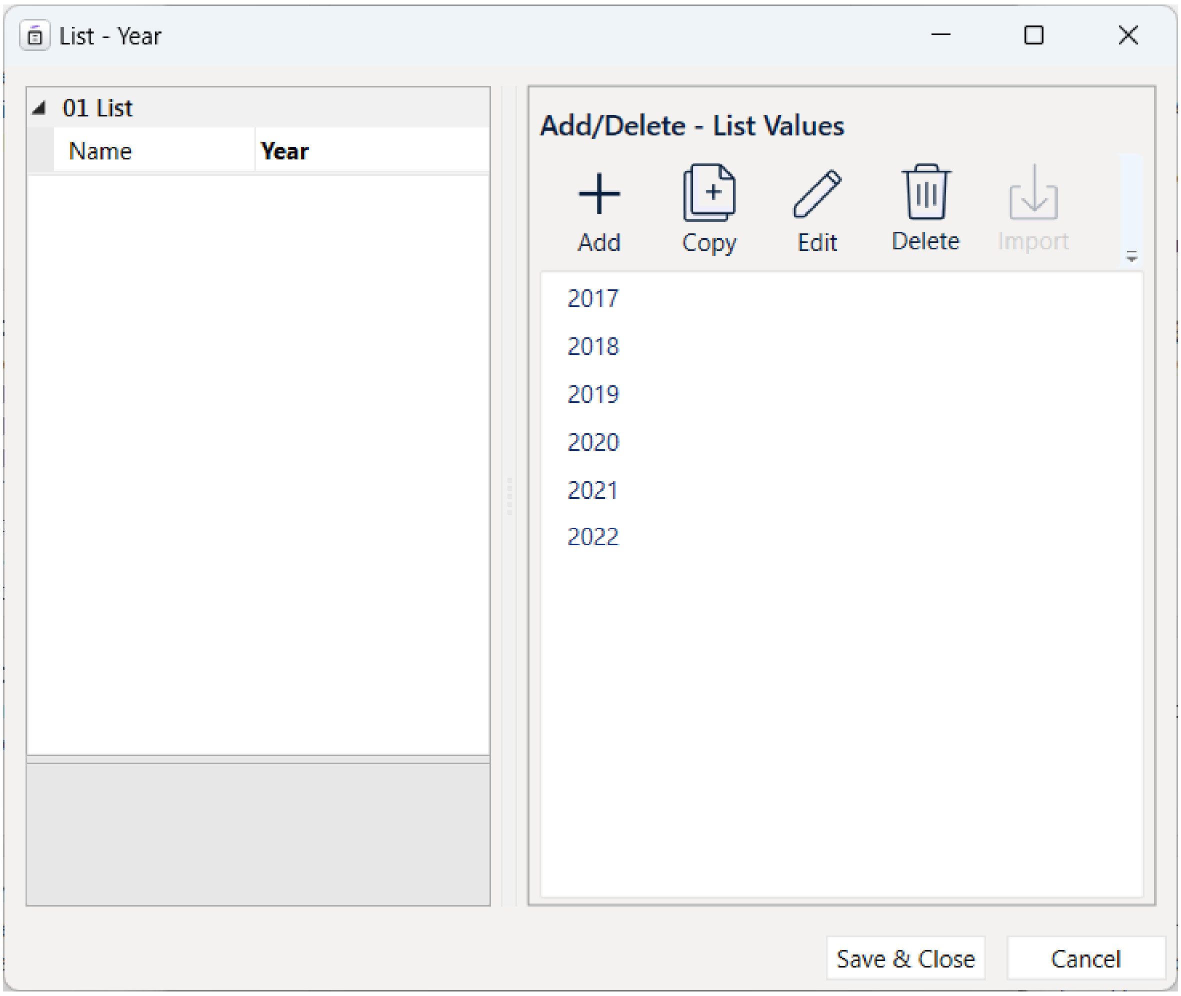
The Lists window shows all the Lists that are currently available in the system. If no List is selected then only the Add button will be available.



You can create a new List by clicking the Add button. Alternatively, you can open an existing List by double-clicking on it or by selecting it and clicking the Edit button.

15.3 The List Window

The List window can be used to create or edit a List consisting of List Values.



Option name	Description	Required
Name	The name for the List	Yes

The ‘Add/Delete – List Values’ section of the window enables you to add List Values to this List.

The ‘Save & Close’ button is used to save the List and close the window.

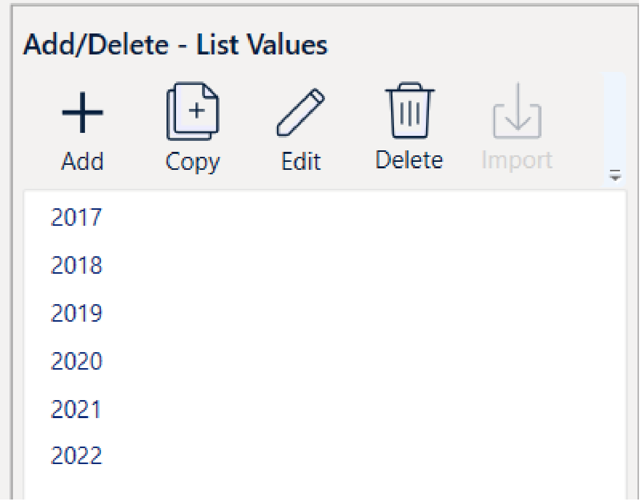
The window also has a ‘Cancel’ button. This button will revert the List to before you made any changes and will close the window. If you are cancelling a new List then it will not be created.

15.4 List Values

A List Value is a single item in a List. A List consists of any number of List Values.

15.5 The List Values List

The 'Add/Delete – List Values' section of the Lists window enables you to add List Values to a List. The section shows the current List Values for this List. If no List Values are selected then only the Add button will be available.



You can add a new List Value by clicking the 'Add' button. Alternatively, you can edit an existing List Value by double-clicking on it or by selecting it and clicking the 'Edit' button.

15.6 The List Value window

The List Value window allows you to create or edit a List Value.

Option name	Description	Required
Value	The content for this List Value	Yes

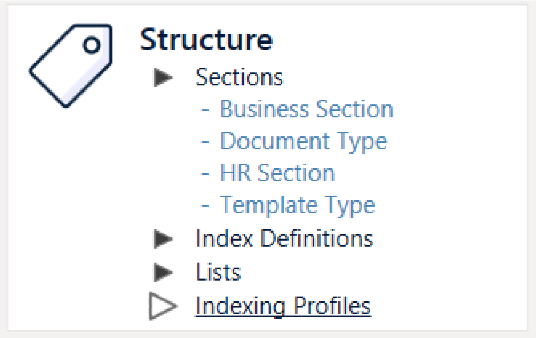
The 'Save & Close' button is used to save the List Value and close the window.

The window also has a 'Cancel' button. This button will revert the List Value to before you made any changes and will close the window. If you are cancelling a new List Value then it will not be created.

16 Indexing Profiles

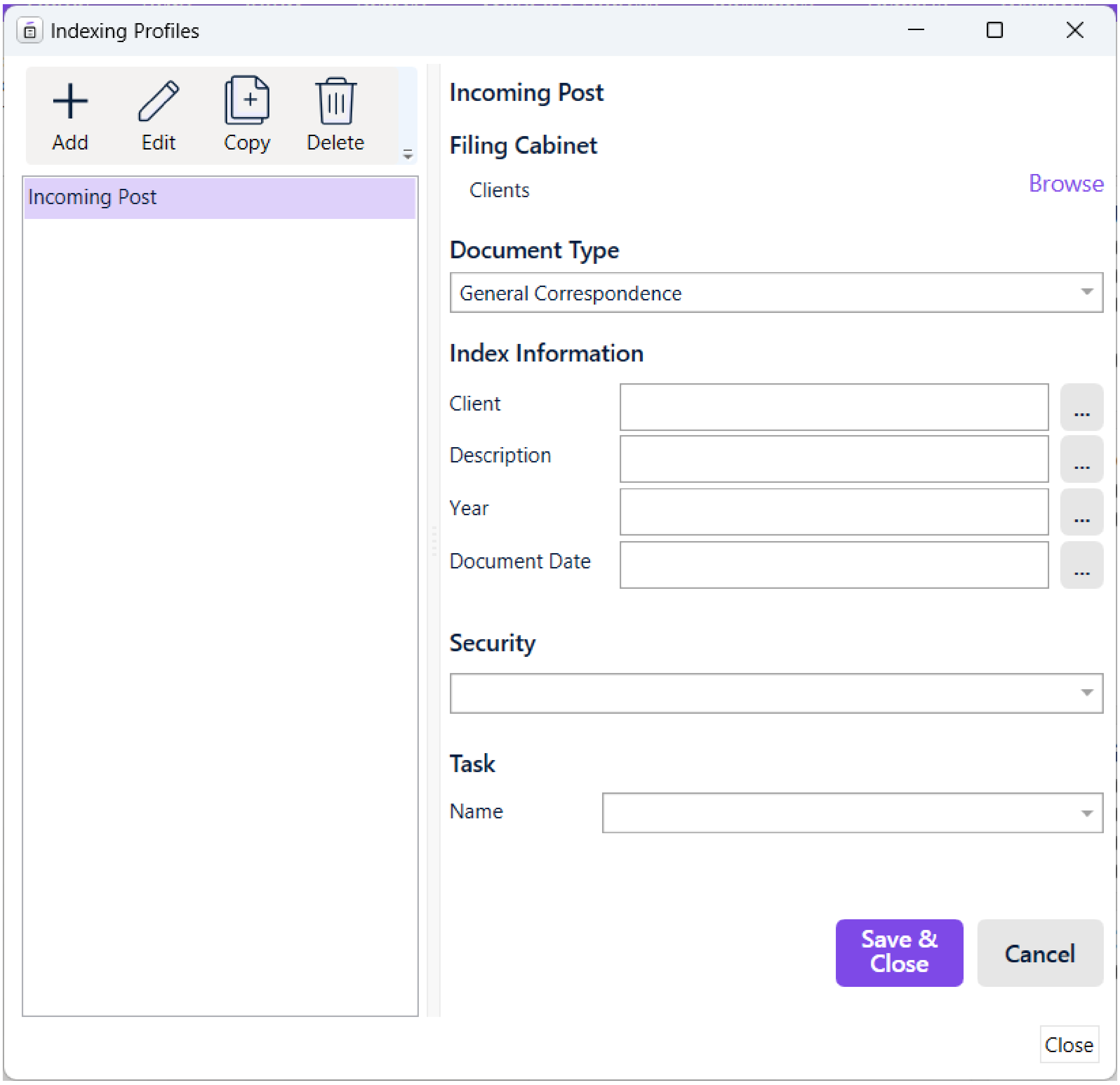
16.1 Opening the indexing profile window

You can open the indexing profile window by clicking on the ‘Index Definitions’ link under the ‘Structure’ heading in the Admin area of the Client application.



16.2 The Indexing Profile Window

Setup an indexing profile to allow users to quickly file documents. There is no need to complete all indexing information in the profile. This means fields that are normally mandatory may be left blank for completion at a later date, or as part of a process.



Option name	Description
Indexing Profile Name	Indexing profiles you create using the add button may be selected here.
Filing Cabinet	The filing cabinet in which the document will be indexed.
Section Name	The filing cabinet section in which the document will be indexed.
Index Information	Optional indexing information. Completion of mandatory fields can be enforced as an advanced task action.
Security	The security profile for the document.
Task Name	The name of the task to be started when this indexing profile is used.
Task Generation	Choose between starting one task per document *or a* single task for multiple documents filed with Indexing Profiles.

17 Intelligent Indexing

Intelligent Indexing can provide a faster, more comprehensive, more powerful and more tightly integrated method for indexing documents.

It is strongly recommended that you read this section in its entirety before deciding to implement Intelligent Indexing. Failure to implement Intelligent Indexing without proper thought and understanding may result in poor application performance and system down-time.

Intelligent Indexing can be used to provide the following functions:

- Live Lists
- Live Linked Lists
- Index Calculations
- Greater Filing Structure Flexibility

In order to build lists using Intelligent Indexing, you must have knowledge of and access to data stored in, or via, Microsoft SQL Server.

17.1 Intelligent Indexing: Things you will need to know

In order to implement Intelligent Indexing, there are a number of things you will need to know about before you get started.

17.1.1 Microsoft SQL Server Knowledge

Intelligent Indexing makes use of Microsoft SQL Server and T-SQL data access and retrieval functionality, so if this is an area you don't know too much about, then you might want to ask your Virtual Cabinet Supplier to give you some assistance and get you started.

17.1.2 Microsoft SQL Server Data

Intelligent Indexing *only* works with Microsoft SQL Server. You *cannot* access data using other database engines like MySQL, Oracle, XML etc., unless you can create reliable Linked SQL Servers to these databases using the required drivers and query those linked server databases use standard Microsoft SQL Server T-SQL.

17.1.3 Intelligent Indexing Connection String

You will need to configure a Database Connection to use as the Intelligent Indexing Connection String in the Index Definition window.

This Database Connection tells Virtual Cabinet where to go looking for the Microsoft SQL Server data that is to be used for the Live List.

17.1.4 Intelligent Indexing SQL Command

You will need to configure the Intelligent Indexing SQL Command in the Index Definition window.

The SQL Command is a Microsoft T-SQL SELECT Statement that returns a column of data that you wish to use for your list.

Basic Example:

Select ClientName from Clients

The above query will return all values from the ClientName column in the Clients table or view within the database referenced by the connection string.

17.2 About Live Lists

Standard Virtual Cabinet Lists, as defined in the Lists section of this document, allow you to provide users with a list of possible values when completing an index field. These lists are created and maintained within Virtual Cabinet. Sometimes, these lists are updated based on external data e.g. a new list is output by another line of business application into a directory watched by the Virtual Cabinet Indexing Service.

Intelligent Indexing provides a mechanism for fetching lists directly from any Microsoft SQL Server database, including Virtual Cabinet itself.

So, as an example, instead of having to maintain your Client records in both a Client Management System and a Virtual Cabinet List, you could create an Intelligent Index to get the list directly from the Microsoft SQL Database of your Client Management System.

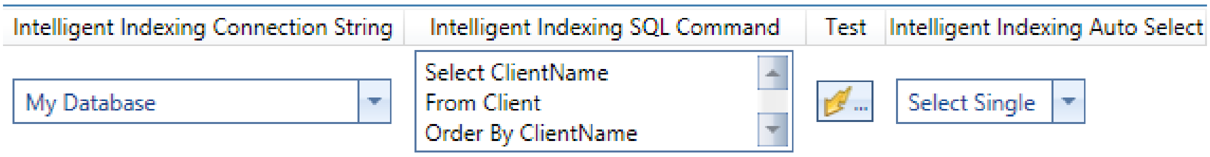
This means that your list of Clients in Virtual Cabinet would always be up to date.

17.3 Configuring a Live List

In order to configure a live list, you must configure the Index Field for Intelligent Indexing using the Index Definitions window in the Admin tab as detailed in Editing Index Definitions and Intelligent Indexing: Things you will need to know.

The following example will demonstrate how to create a simple Live List.

An Intelligent Indexing Connection String and SQL Command have been configured within Index Definitions for an index field called Client Name as shown below.



Note the *Order By* clause in the SQL Command. Data is entered in to lists in the order it is retrieved from SQL Server. If you wish to order the data, you must use the *Order By* clause.

The next time the Client Name Index is shown in the indexing screen, it will appear as an Intelligent Index Field. The drop down list will be populated by data returned using the SQL Command.

17.4 The Advantages and Disadvantages of Live Lists

The Live List functionality of Intelligent Indexing is very powerful but it may not be appropriate to implement it in many scenarios.

The following lists of advantages and disadvantages should be considered before implementing Intelligent Indexing.

17.4.1 Advantages

- Live data means you don't have to worry about keeping multiple systems up to date with the same information.

- You can implement Linked Lists so that index field lists are contextual (based on fields that have already been completed). See About Live Linked Lists
- You no longer need to rely on Screen Scraping to index documents accurately using data from other systems.
- Indexing documents is faster.
- Indexing documents is more accurate.

17.4.2 Disadvantages

- Intelligent Indexing SQL Command execution on databases could impact performance of other systems.
- If the SQL database(s) used for the Live Lists data become unavailable then documents cannot be indexed in Virtual Cabinet.
- A number of variables could impact the performance of the fetching of the data and building of the lists; such as the complexity of the query, current database activity, network traffic etc.

In summary, you should be pretty switched on to understanding the implications of the above before implementing Live Lists.

17.5 About Live Linked Lists

Live Linked Lists provide the ability to link multiple live lists together in the Virtual Cabinet Indexing screen.

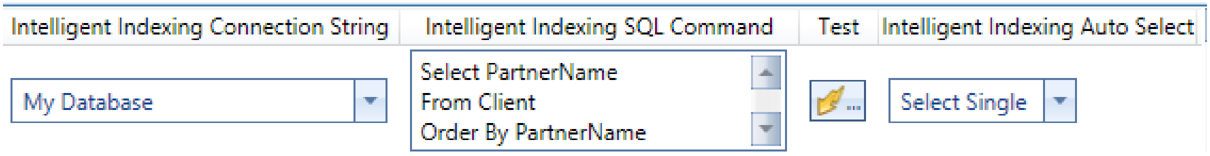
For example, you may have two index fields configured in your Clients cabinet, Client and Managing Partner. You store all Client and related Managing Partner data in another system that uses a Microsoft SQL Server Database. Rather than manually re-create and maintain all of your Client and Managing Partner data in Virtual Cabinet, you can use Intelligent Indexing to get it all from your existing system and link it all together in Virtual Cabinet automatically.

17.6 Configuring Live Linked Lists

Once you have followed the process of Configuring a Live List using Intelligent Indexing, you can start to link those lists together.

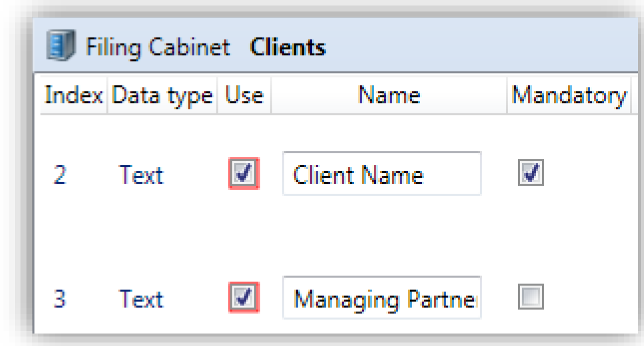
Example:

In addition to the Client Name index field detailed in Configuring a Live List, an Intelligent Indexing Connection String and SQL Command have been configured within Index Definitions for an index field called Managing Partner as shown below.



Now there are two Virtual Cabinet index fields that have Live Lists. This means that you could select the wrong Managing Partner for the wrong client when indexing a document in Virtual Cabinet. The lists are not linked at the moment so let's have a look at linking them together.

In our example Index Definition, Client Name is INDEX 2 and Managing Partner is INDEX 3. These Index numbers are important when it comes to linking list together using Intelligent Indexing.



We now need to use these Index numbers in our Index Definition SQL Commands to link the lists together. By adding a WHERE clause to our T-SQL SELECT statements, we can restrict the list data that is returned for the current list based on the value that has been selected from another list.

So if Managing Partner is INDEX03, we will add the following WHERE clause to our SQL Command for the Client Name field to ensure we only see Client Names that are relevant to the Managing Partner that has been selected.

Select Distinct ClientName
From Client
Where (PartnerName = 'INDEX03')
Order By ClientName

The above WHERE clause means that the query will return a list of unique (Distinct) values from the ClientName column in the Client Table where the PartnerName equals whatever has currently been selected in Index number 3.

Note the capitalisation of the word INDEX and the addition of the leading zero. **INDEX0**2, **INDEX0**3 to **INDEX**10 etc.

When specifying INDEX and/or LEVEL references like this in the WHERE clause of a SQL Command, you must wrap the statement in brackets () and the Index/Level must be declared within apostrophes.

Here are some more WHERE clause syntax examples:

Where (ColumnA = 'INDEX02')

Where (ColumnA = 'INDEX02') AND (ColumnB = 'INDEX06')

Where ((ColumnA = 'INDEX02') AND (ColumnB = 'INDEX06')) OR (ColumnC = 'LEVEL02')

So, now that our Client Name field has a WHERE clause, we should see that the selection of a Managing Partner in the indexing screen correctly filters our Client Name list so that only Clients with the currently selected Managing Partner are shown.

Now we need to add a WHERE clause to the Client Name SQL Command so that the selection of a Client Name automatically completes the Managing Partner index field with the correct value.

The new SQL Command for Client Name is as follows:

Select Distinct PartnerName
From Client
Where (ClientName = 'INDEX02')
Order By PartnerName

Now the selection of a Client Name will automatically complete the Managing Partner Index field (as there is only ever one Partner per client and Intelligent Indexing Auto Complete is ticked in index definitions).

There is no limit on the number of live lists you can link together, with the exception that there are a limited number of available index fields within Virtual Cabinet.

17.7 Index Calculations

Intelligent Indexing allows you to perform calculations and apply logic to the Virtual Cabinet Indexing process.

As Intelligent Indexing makes use of SQL Commands, and Microsoft SQL Server can perform complex calculations, you can perform calculations when indexing documents.

There are loads of reasons why you might want to do more than just SELECT values in a column to build a list for an index field using Intelligent Indexing, some examples of which might be:

- Calculate a deadline date for the processing of a particular type of document
- Calculate who should approve an invoice if it is over a certain amount

Intelligent Indexing places no restriction on SQL functions you can use within a SELECT statement.

Example:

INDEX09 is used to classify the type of document. If the type of document contains the word ***correspondence*** then it should be processed within 7 days. The Document Deadline field is INDEX21 and has the following SQL Command configured:

```
Select Case When ('INDEX09') Like '%correspondence%' Then
DATEADD(dd,7,GetDate()) End
```

The above command uses T-SQL to add 7 days to today’s date.

17.8 Intelligent Indexing Cache

Intelligent Indexing has an optional cache setting.

A cache is the name for data stored in memory so that it is more quickly and easily retrievable. You can ask Virtual Cabinet to keep a Cache of Intelligent Indexing SQL Commands and related results for a configurable period of time. All cache data is stored centrally on the server.

If the cache is turned on, this might help return indexing information to users more quickly (if the corresponding queries and data are in the cache) and it might also reduce the overhead on the databases of other systems as there will be no need to run a SQL Command against the database specified in the Connection String if the command and results are already available in the Virtual Cabinet cache.

The cache can be turned on or off, and the cache life adjusted in minutes, via Global Settings in the Admin tab.

Intelligent Index Cache	**Off**
Intelligent Index Cache Life	**120**

17.8.1 Intelligent Indexing Client-side List Caching

An additional cache option within Global Settings allows Intelligent Index lists >250 items to be stored locally on the client machine. This way the lists do not need to be downloaded every time they're requested, only the first time. This will reduce the overhead for sites where the network connection to the server is slow, e.g. when using a VPN.

The Cache lasts for as long as the application (Virtual Cabinet/Outlook/Word etc.) remains open. To refresh results the application will need to be restarted.

17.9 Handy Hints & Tips

Handy hints and tips to be aware of when using Intelligent Indexing.

17.9.1 Views and Functions

Rather than put a very long and/or complex query or logic in to the rather small SQL Command box in Index Definitions, try creating a SQL View or Function instead. SQL Views and Functions can be queried in the same way as SQL Server tables.

Watch out though – if you create views in databases, always take a copy of your query and put it in a safe place. Application providers own the design of their databases and very rarely take account for people other than themselves making changes. This means they could send you an update one day that fails because of your view or deletes the view altogether!

17.9.2 Distinct

Use the Distinct function in your select statements to ensure you do not get duplicate values returned for Intelligent Indexing fields.

Let's say you have a table with a column called ***Type***. The table has 100 rows but there are only two different ***Types***.

If you set your Intelligent Indexing SQL Command up as ***Select Type from Table*** you will get a list of 100 values with lots of duplicates. If you use the command ***Select <u>Distinct</u> Type from Table*** then you will get a list of unique types in your column.

17.9.3 Order By

Remember to add an Order By clause at the end of you select statement to specify how the list contents should be sorted. If you don't, you will get an order that SQL Server determines that might not make sense to anyone!

Intelligent Indexing SQL Commands can return multiple columns, but Virtual Cabinet will only ever display the results in the first column. So you can add columns to your Query to assist with custom sorting.

17.9.4 Logging

If you are struggling to get Live Lists and/or Live Linked Lists working and you think you have set everything up properly: you have configured a Connection String and a SQL Command, your field(s) display the Intelligent Indexing chevrons in the Indexing screen and you are not getting the correct behaviour or any error messages, then it might be worth turning on logging.

Logging allows you to catch information about all the SQL Commands that are being executed in the background.

You can turn logging on by creating a new DWORD registry key in **HKEY_CURRENT_USER\Software\VirtualCabiBond** called **EnableIntelligentIndexingLogging** and setting its value to **1** on a machine running the Virtual Cabinet client software.

After restarting the client, the SQL Commands will be written to the CabiBond log (default location C:\Program Files\Lindenhouse Software Ltd\CabiBond.Net\CabiBond.log)

Note: If you see (1=1) in the log file, this simply means that your WHERE clause is not relevant to the current query. Virtual Cabinet sets it to 1=1 which renders it redundant. This would happen if your WHERE clause was based on INDEX02 but there was not yet a value selected in INDEX02.

17.9.5 Substitution Syntax

The CASE function is the Microsoft SQL Server equivalent to an IF statement. You might want to use the CASE function in Intelligent Indexing to effect the outcome of the SQL Command, without restricting the results (as would be the effect of adding a WHERE clause).

If you are declaring an INDEX or LEVEL value in a CASE rather than a WHERE, you have to do it slightly differently:

WHERE Example:

> *WHERE* ***(ClientPartnerName = 'INDEX02')***
> ***i.e.***
> ***(ColumnName ='INDEX/LEVEL')***

CASE Example:

*Select Case When **('INDEX09')** Like '%correspondence%' Then DATEADD(dd,7,GetDate()) End*
i.e.
('INDEX/LEVEL')

Important:

Note the special bracketing syntax above which applied to all Intelligent Indexing SQL Commands.

Bracketing the combined column and INDEX/LEVEL value, e.g. **(**ClientName = 'INDEX02'**)**, will result in the clause being ignored completely if the INDEX/LEVEL value is empty. i.e. it will be removed from the Intelligent Indexing SQL Command.

Bracketing just the INDEX/LEVEL value, e.g. ClientName = **(**'INDEX02'**)**, will result in the clause resolving to ClientName='' if the INDEX/LEVEL value is empty.

18 Email - Indexing Defaults

Indexing Defaults can be configured to make the indexing process for emails faster and easier.

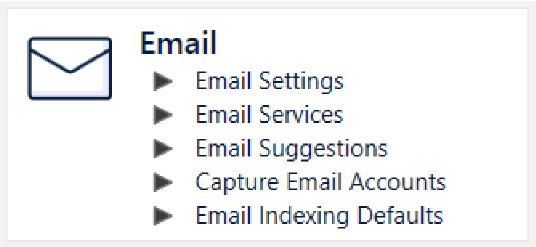
Email Indexing Defaults allow a Virtual Cabinet Administrator to configure a Global Default for the indexing of emails when the Office Addin option to use the Virtual Cabinet Indexing Pane is enabled in Microsoft Outlook.

The Virtual Cabinet indexing process can entail a number of steps such as selecting a Filing Cabinet, a File Section (Section Value), Document Type, entering a Description, a date and selecting a client or supplier.

In some environments and for some users, emails are always indexed to the same Filing Cabinet, the same File Section and the same Document Type. The Description is often copied and pasted from the Email subject line and the date is usually set as the date of the email. Without Email Indexing Defaults, all this work is done manually by the user for each email they file.

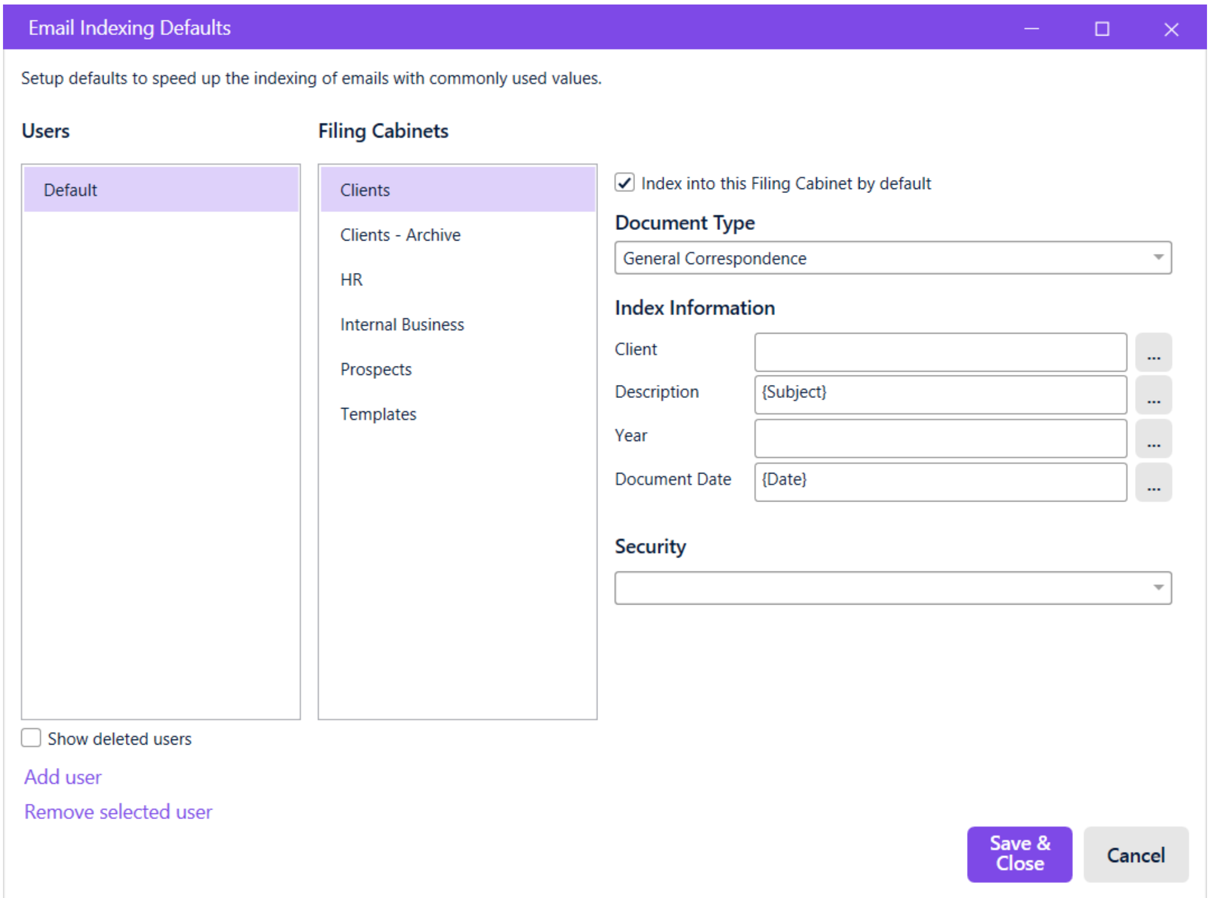
Email Indexing Defaults potentially alleviate a lot of effort for users who index a lot of emails.

Indexing Defaults can be configured by clicking the 'Email Indexing Defaults' option in the Email area of the Admin Tab.



The Indexing Defaults Window contains a list of Virtual Cabinet users on the left. The very first entry in the list is labelled 'Default'. When selected, any configuration against the Default user will apply to all users.

You can also add user specific indexing defaults via the "Add user" button. It should be noted that users can tailor their own defaults, and in doing so, create their own entry for their user account in this list.



First select which user you want to configure defaults for. The settings for the "Default" user will apply to all users that don't have their own unique settings, and therefore aren't in the Users list on the left.

You can then select the Filing Cabinet you want to configure defaults for. You can have different defaults for each Filing Cabinet you use.

One Filing Cabinet is probably the one you use most and so you can use the setting "Index into this Filing Cabinet by default". When the user is indexing emails this Filing Cabinet will always be selected first.

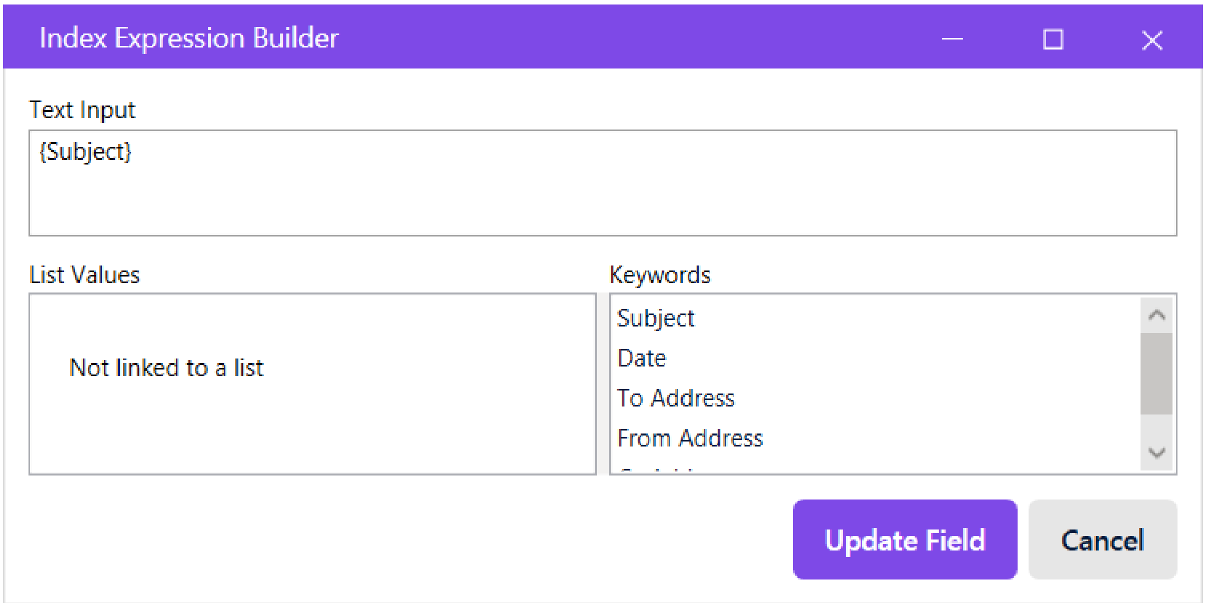
Configure the Filing Information you want to be used as defaults when indexing emails via the Virtual Cabinet Indexing pane in Outlook.

You can configure as much or as little as you want, but bear in mind the more you configure, the less work your users will have to do themselves.

In the above example, a default Filing Cabinet of 'Clients' and Section Value of 'General Correspondence' have been selected.

When filing in this location, there are three additional index fields to complete: Client, Description and Document Date.

By clicking the ellipses button next to an index field, you can launch the Index Expression Builder and use email Keywords to map email properties to index fields.



In the above example, the email {Subject} has been mapped to the Description field and the email {Date} has been mapped to the Document Date field.

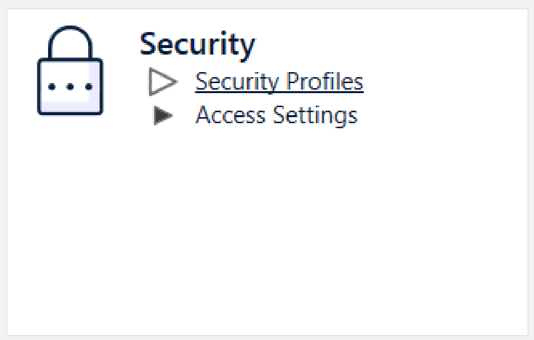
When users are indexing email in Microsoft Outlook via the Virtual Cabinet Indexing pane, all they are left to do is complete the Client field and click the ‘File’ button.

19 Security Profiles

Security Profiles are used to define the types of document actions that Users and Groups can perform. A Security Profile can be associated with any number of cabinets and folders. The Security Profile will define the Users and Groups that are able to view, edit, delete or re-index documents in the folder or cabinet that the Security Profile is attached to.

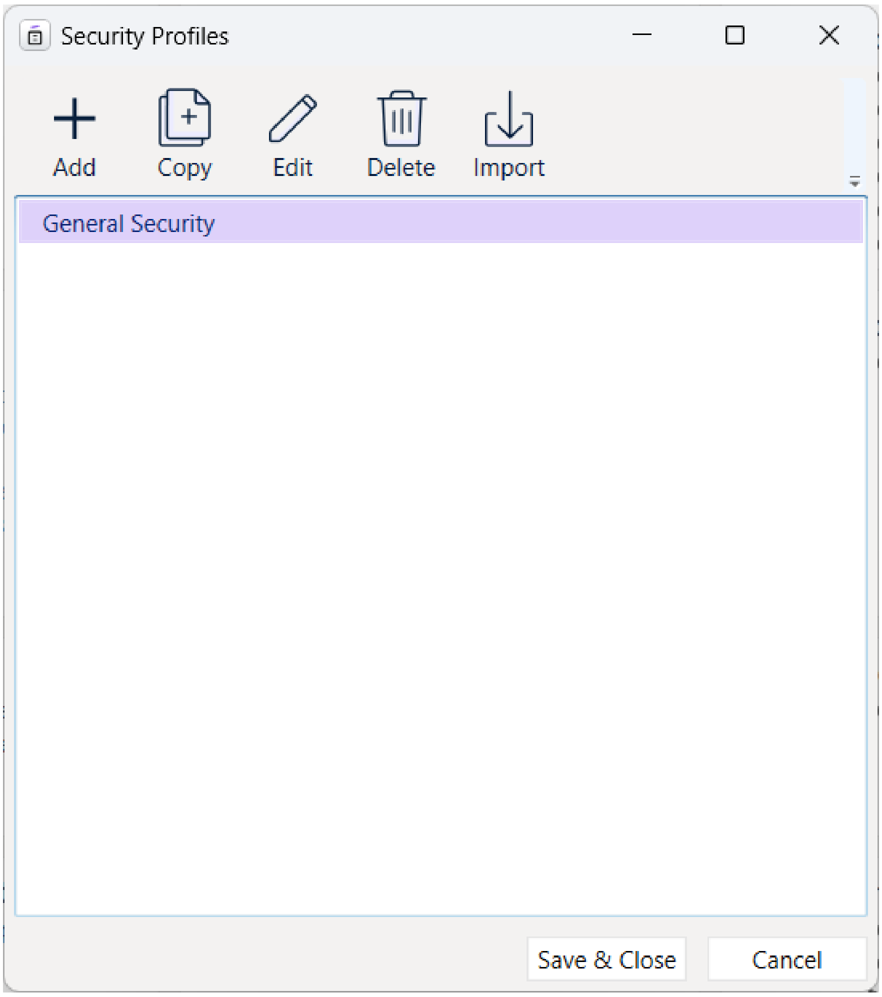
19.1 Opening the Security Profiles List Window

You can open the Security Profiles list window by clicking on the Security Profiles link in the main Admin area.



19.2 The Security Profiles List Window

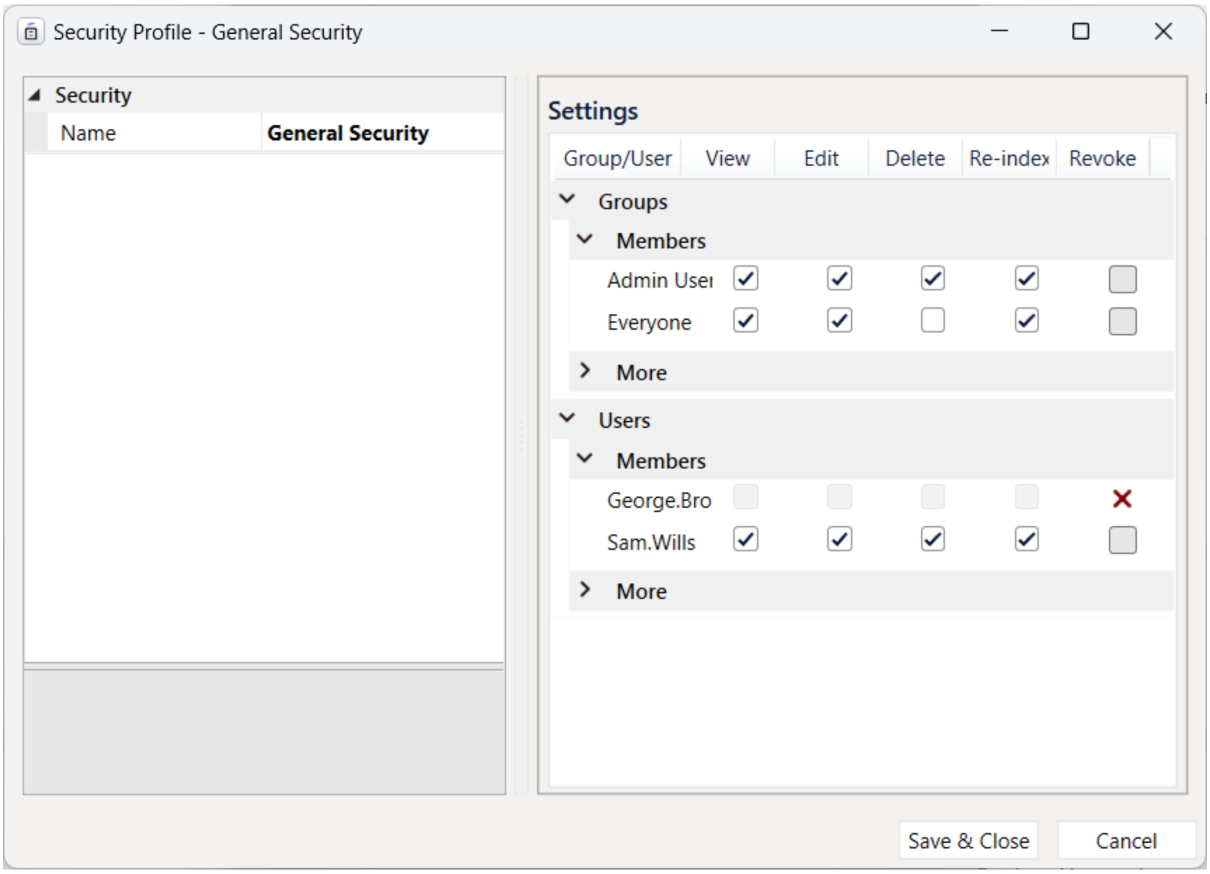
The Security Profiles are listed in the Security Profiles list window. If no Security Profile is selected, only the Add button will be available.



You can click ‘Add’ to create a new Security Profile. Alternatively, you can edit an existing Security Profile by double-clicking on one or by selecting one and clicking the ‘Edit’ button.

19.3 The Security Profile Window

The Security Profile window is used to allow Users and Groups to perform certain document actions. The saved Security Profile can then be associated with cabinets, folders and documents where you want to apply those permissions.



Option Name	Description
Name	Allows you to set the name of this Security Profile. This name will appear in drop-down lists of Security Profiles when Users are indexing documents and will also appear in the Security Name column of search results.

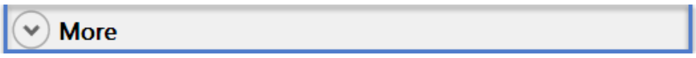
The Security Profile window also has a Settings panel that enables you to set the document actions that can be performed by Users and Groups.

The Settings panel is divided into four expandable sections:

Section		Description
Groups	Members	Lists any Groups with a ticked permission.
	More	Lists all the other Groups that don't have any permission set under this Security Profile.
Users	Members	Lists any individual Users with a ticked permission.
	More	Lists all the other Users that don't have any permission set under this Security Profile.

You can show or hide the sections by clicking on the section headers.

When a section is hidden, the section title will have a down-arrow next to it. You can then click on the section header to expand the section.



A choice of five permissions can be applied to each User or Group.

Permission name	Description
View	Allows the named User or Group to see documents with this Security Profile. The document will appear in search results and can be opened for viewing.
Edit	Allows the named User or Group to edit documents with this Security Profile. The document can be opened for editing.
Delete	Allows the named User or Group to delete documents with this Security Profile. The document can be deleted by selecting it and clicking 'Delete'.
Re-index	Allows the named User or Group to re-index documents with this Security Profile. The document can be re-indexed by selecting it and clicking 'Re-Index'.
Revoke	Prevents the named User or Group having ANY visibility of or access to documents with this Security Profile; even if that user (or the users in the group) are in another group that does have access to this security profile.

Permissions are additive: If a User belongs to more than one Group then that User will gain all of the permissions from each group. For example, if you belong to a Group with the View permission and another Group with the Delete permission, you will have both the View and Delete permissions. This would enable you to view or delete any document associated with the Security Profile.

However, if Revoke is applied to a User or Group, ALL rights for that user or Group are rescinded.

The 'Save & Close' button is used to save the Security Profile and close the window.

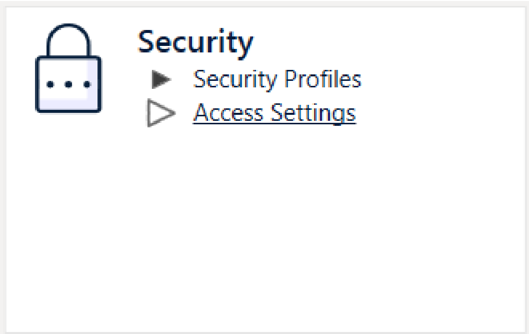
The window also has a 'Cancel' button. This button will revert the Security Profile to before you made any changes and will close the window. If you are cancelling a new Security Profile then it will not be created.

20 Access Settings

Access Settings are configurations that allow different types of User to have access to different parts of the system. Each User is associated with an Access Setting that describes the operations they are able to perform within the system.

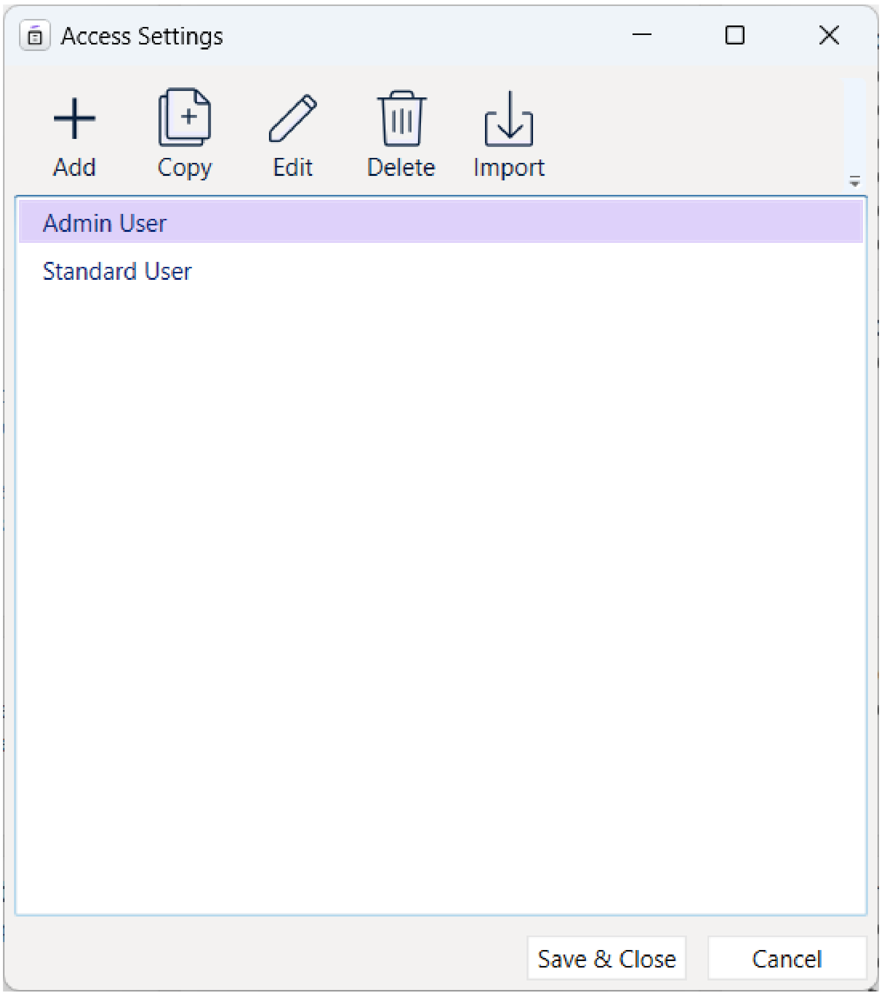
20.1 Opening the Access Settings List Window

Click the 'View Access Settings' link to open the Access Settings list window.



20.2 Access Settings List Window

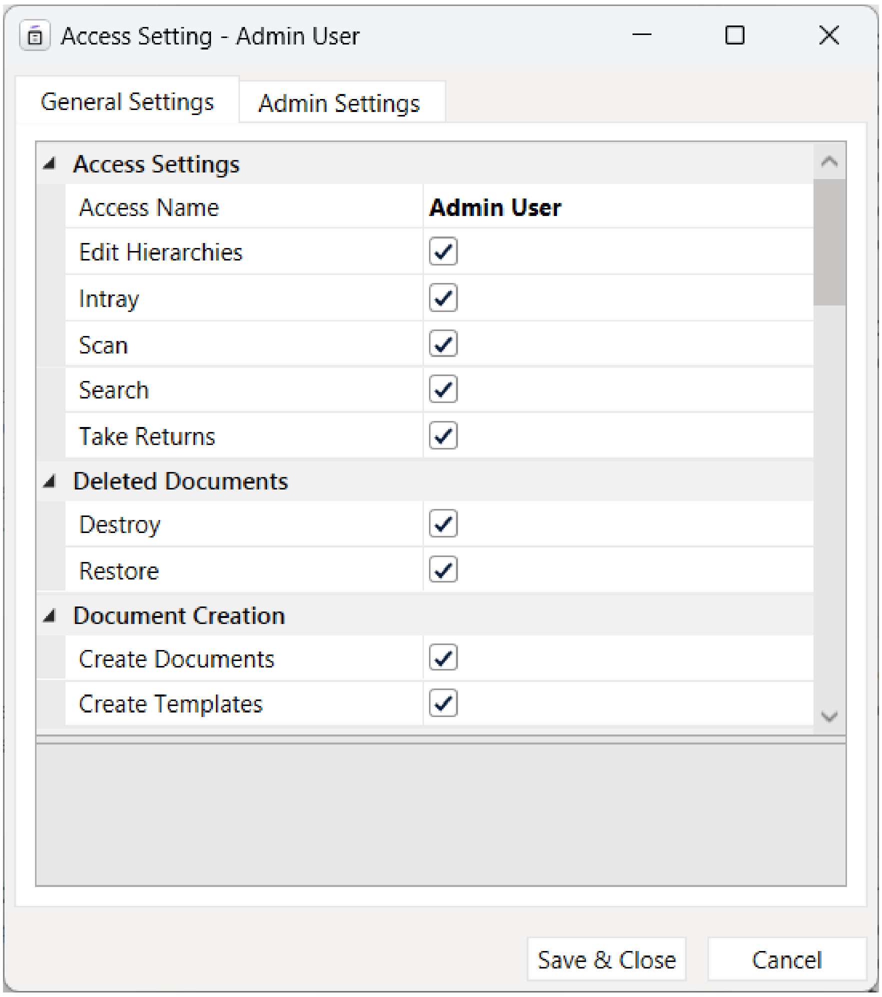
The Access Settings are listed in the Access Settings list window. If no Access Setting is selected, only the Add button will be available.



You can click ‘Add’ to create a new Access Setting. Alternatively, you can edit an existing Access Setting by double-clicking on one or by selecting one and clicking the ‘Edit’ button.

20.3 The Access Setting Window

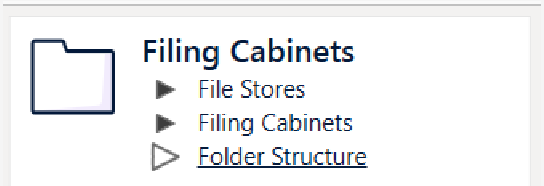
The Access Setting window is used to assign a certain level of access to a specific type of User.



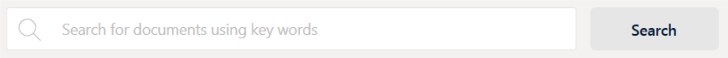
Available Access Settings are split between two tabs, General Settings and Admin Settings.

General Settings

Option name	Description
Access Settings	
Access name	Sets the name of this Access Setting. The name will appear as a choice in the Access ID drop-down list when editing a User.
Edit Hierarchies	If ticked, the user will be able to add, edit and delete folders and cabinets. A User with this permission will be able to create folders and will also be able to rename, move and change the Security Profile on folders.

	If the User also has the Admin option ticked, they will be able to edit folder hierarchies from the Admin tab.  A user that has this option ticked but does not have the Admin option ticked will be able to edit folders by right-clicking them in the Cabinets tree in the Search panel.
Intray	If ticked, a User with this Access Setting will have an Intray tab in the Client application.
Scan	If ticked, a User with this Access Setting will have the Scan tab in the Client application.
Search	If ticked, a User with this Access Setting will have the Search tab in the Client application.
Take Returns	If ticked, a User with this Access Setting will be able to Take and Return documents to and from the Work In Progress tab in the Client application.
Deleted Documents	
Destroy	If ticked allows permanent removal of documents from the file store. Destroyed documents cannot be restored. N.B. take a look at Document Retention if you would automatically like to destroy documents.
Restore	If ticked allows recovery of deleted documents.
Document Creation	
Create Documents	If ticked, a User with this Access Setting will be able to use the Document Creation feature to create new documents based on Templates.
Create Templates	If ticked, a User with this Access Setting will be able to add and create new Document Creation Templates.
Document Export	
Email Documents	If ticked, a User with this Access Setting will be able to email documents out of the Client application.
Extract Documents	If ticked, a User with this Access Setting will be able to extract documents out of the Client application and onto their local computer.
Document Shortcuts	
Create Shortcuts	If ticked, allows a user to create shortcuts to documents
Delete My Shortcuts	If ticked, allows a user to delete their own shortcuts to documents
Delete Other User's Shortcuts	If ticked, allows a user to delete shortcuts that are in another user's Intray.
Indexing	

Delete Other User's Email Capture Rules	Allow a user to delete another user's Email capture rules from the Outlook Addin Indexing Pane.
Override Default Security	If ticked, a User with this Access Setting will be able to change the Security Profile of a document when indexing.
Integrations	
Extract Files	If ticked, a User with this Access Setting will be able to extract files through integrations.
Extract Info	If ticked, a User with this Access Setting will be able to extract configuration information through integrations.
Index Documents	If ticked, a User with this Access Setting will be able to index documents through integrations.
Scan	If ticked, a User with this Access Setting will be able to scan through integrations.
Search	If ticked, a User with this Access Setting will be able to search through integrations.
Send to Intray	If ticked, a User with this Access Setting will be able to send documents to Intrays through integrations.
View Intray	If ticked, a User with this Access Setting will be able to view their Intray through integrations.
Intrays	
Delete from Intrays	If ticked, a User with this Access Setting will be allowed to delete documents directly out of an Intray.
View Shortcuts in Other User's Intrays	If ticked, a User with this Access Setting will be allowed to view the list of Shortcuts in other User's Intrays. If the user doesn't have permission over the document behind the shortcut then they won't be able to open the shortcut, but they can see the Shortcut in the list.
Links	
Add Document Links	If ticked, a User with this Access Setting will be allowed to create document links. Document links are documents in VC that are links to external content such as websites and folder paths.
Notes	
Add Notes	If ticked, a User with this Access Setting will be able to add Notes to documents.
Delete Notes	If ticked, a User with this Access Setting will be able to delete Notes from documents.
Edit Notes	If ticked, a User with this Access Setting will be able to edit existing Notes that are attached to documents.
Reports	
Audit Report	If ticked, allows access to the user audit report.
Completed Processes	If ticked, allows access to the completed processes report.
Intray Report	If ticked, allows access to the intray report.
Outstanding Tasks	If ticked, allows access to the outstanding tasks report.
Portal Report	If ticked, allows access to the portal report.
Searching	

Content Search	If ticked, allows content searching of documents.
Keyword Search	If ticked, a User with this Access Setting will be able to search using the main Keyword Search box in the Search tab of the Client application.  If unticked, the User will see a Search button at the bottom of the Advanced Search sidebar. The User will be able to search by specifying criteria in the Advanced search panel and clicking Search.

Admin Settings

Admin Settings allow you to specify access to certain functions in the Virtual Cabinet Admin tab. An individual Admin Setting exists for each Admin option. Enabling a single option will grant associated users access to the Virtual Cabinet Admin tab but they will only see the options permitted via their Access Setting.

The ‘Save & Close’ button is used to save the Access Setting and close the options window.

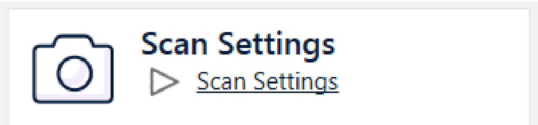
The window also has a ‘Cancel’ button. This button will revert the Access Setting to before you made any changes and will close the window. If you are cancelling a new Access Setting then it will not be created.

21 Scan Settings

Each Scan Setting is a configuration for setting up a scanner. Users select a Scan Setting before they scan documents into the system. Their chosen Scan Setting specifies the details of the scanning operation.

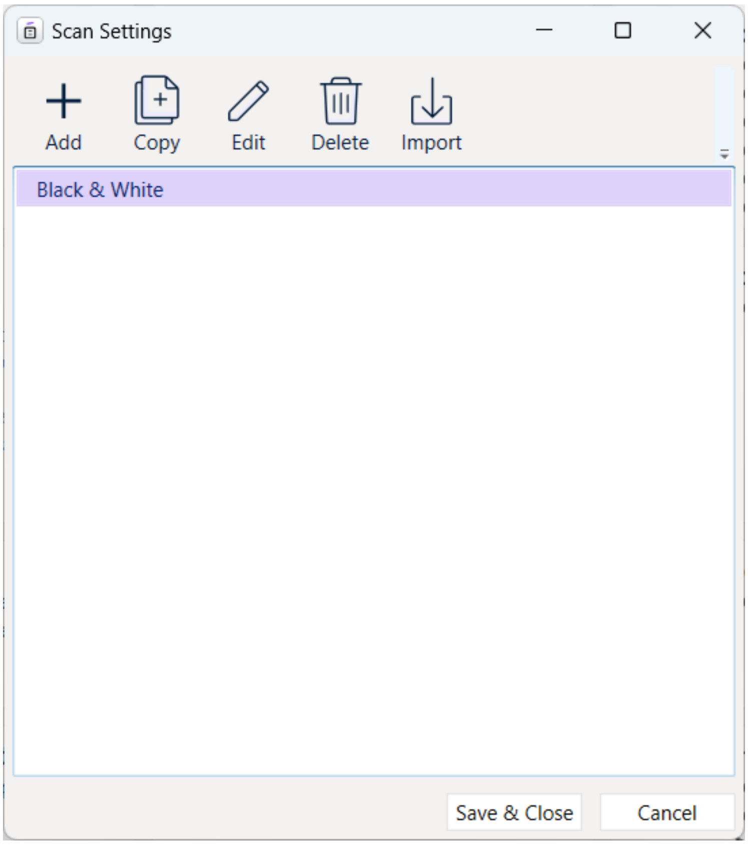
21.1 Opening the Scan Settings Window

You can open the Scan Settings window by clicking the ‘Scan Settings’ link under the Scan Settings heading.



21.2 The Scan Settings List Window

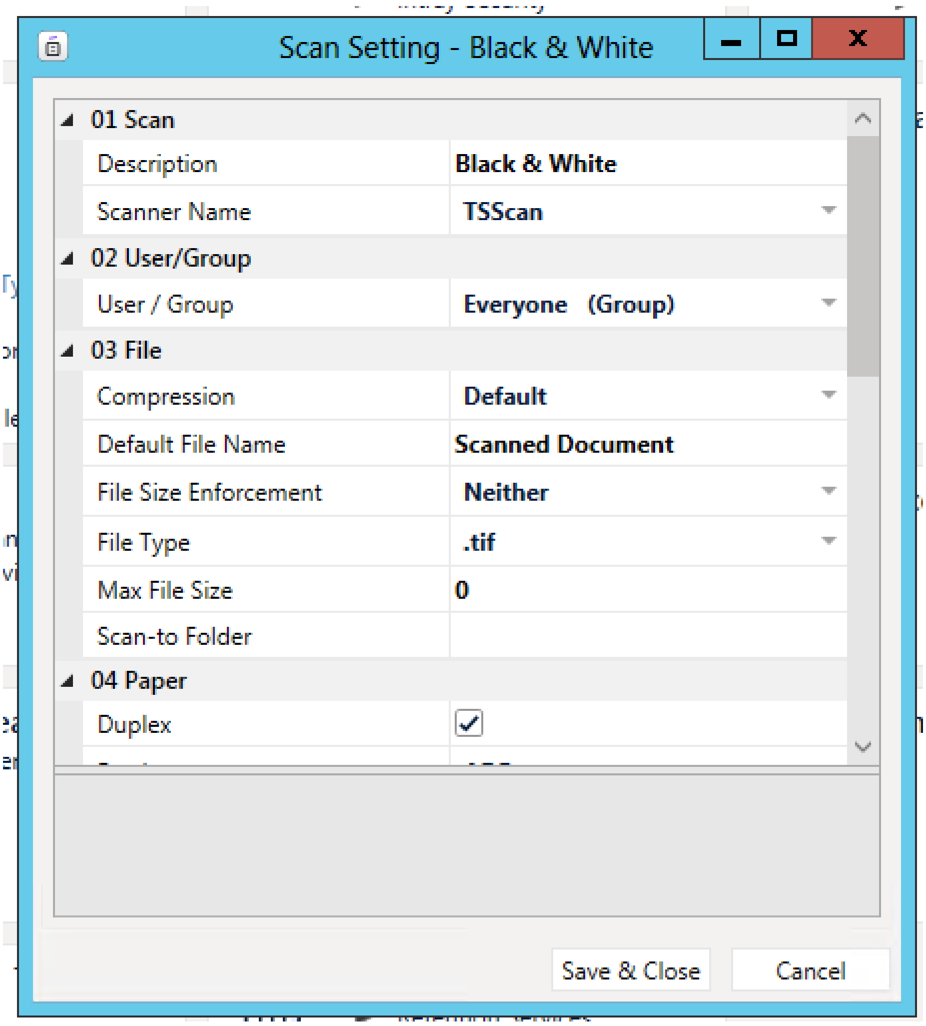
The Scan Settings window lists the existing Scan settings in the system. There will initially be two Scan Settings: ‘Black & White’ and ‘Colour scan’. When no Scan Settings are selected, only the Add button will be available.



The toolbar provides options for adding a new Scan Setting or editing an existing one.

21.3 The Scan Setting Window

The Scan Setting window is used to define the details of a scanning operation.



<table>
<tr><th>Property</th><th>Description</th><th>Required</th></tr>
<tr><td>Description</td><td>The name that Users will be able to identify the Scan Setting with.</td><td>Yes</td></tr>
<tr><td>Scanner Name</td><td>A choice of the available Scanners that are currently attached to the computer. Select the name that identifies the scanner you want to use.</td><td>Yes</td></tr>
<tr><td>User / group</td><td>A choice of all the Users and Groups in the system. Select the User or Group who should be able to see this Scan Setting.</td><td></td></tr>
<tr><td>Compression</td><td>A choice of compression methods. Select the compression that should be applied to the scanned image.<table><tr><td>Default</td><td>Default compression for your chosen File Type.</td></tr><tr><td>None</td><td>No compression.</td></tr><tr><td>Flat</td><td>Zip-style data compression.</td></tr><tr><td>Jpeg</td><td>Jpeg compression. Applies to colour or greyscale images.</td></tr></table></td><td>Yes</td></tr>
<tr><td>Default File Name</td><td>A default file name for images that are scanned with this Scan Setting. The User will be able to change this file name if they want to.</td><td></td></tr>
<tr><td>File Size Enforcement</td><td>Used to warn the user or prevent them from saving a scanned image if the file size is too large.<table><tr><td>Warn</td><td>Allows the User to confirm that they want to save the large file.</td></tr><tr><td>Enforce</td><td>Disallows the User from saving the large file.</td></tr><tr><td>Neither</td><td>Allows Users to save files of any size.</td></tr></table>The ‘Neither’ option is selected by default.</td><td></td></tr>
<tr><td>File Type</td><td>A choice between .tif, .jpg and .pdf files. The default is to save scanned images as .tif files.</td><td></td></tr>
<tr><td>Max File Size</td><td>If the File Size Enforcement option is set to ‘Warn’ or ‘Enforce’, this setting is used to</td><td></td></tr>
</table>

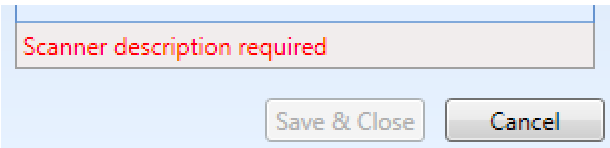
<table>
<tr><td></td><td>specify the maximum allowed file size of images (measured in MB).</td><td></td></tr>
<tr><td>Scan-to Folder</td><td>Allows you to specify a file path to save the scanned image to. If a Scan-to folder path is specified, all scans using this Scan Setting will be saved to the location (and the User will not be given the option to send the scan to an Intray).</td><td></td></tr>
<tr><td>Duplex</td><td>If ticked, the scanner will scan both sides of the paper as it scans.</td><td></td></tr>
<tr><td>Feeder</td><td>A choice between ADF and Flatbed. Select ADF if the scanner has a paper feeder.</td><td>Yes</td></tr>
<tr><td>Media</td><td>A choice between ‘Normal’ (opaque) and ‘Transparent’ media type that is being scanned.</td><td>Yes</td></tr>
<tr><td>Paper Size</td><td>A choice of possible paper sizes. Specify the size of the paper that is being scanned.</td><td>Yes</td></tr>
<tr><td>Scan Delivery Mode</td><td>Used to help support more models of scanner. The choices are:
<table>
<tr><td>1</td><td>Most types of scanner will work with this mode. This is the default.</td></tr>
<tr><td>2</td><td>Some other types of scanner (such as SCSI models)</td></tr>
<tr><td>3</td><td>Disables the ‘scan ahead’ feature that is used to speed up scanning but can sometimes cause problems.</td></tr>
</table></td><td>Yes</td></tr>
<tr><td>Split Mode</td><td>Defines how the scan should be split into separate documents. The choices are:
<table>
<tr><td>None</td><td>All the scanned pages will form a single document.</td></tr>
<tr><td>Single Sides</td><td>Every page will be a different document.</td></tr>
<tr><td>Separate sheets</td><td>Every two-sided sheet will form a different document.</td></tr>
<tr><td>Barcode Separators</td><td>All the pages will be scanned as a single document until a ‘Document Separator Sheet’ is found. The separator will be</td></tr>
</table></td><td></td></tr>
</table>

	discarded and any following pages will form another document. A printable Document Separator Sheet is included in the Client application install directory. It can be accessed from the Scan tab of the Client by selecting a Scan Setting that uses Barcode Separators and clicking the link that appears.
Alternating Rotation	When a rotation is applied to the Scan Setting, this option can be ticked to reverse the rotation of every second page. This can be useful when duplex scanning pages in a landscape orientation.
Brightness	The brightness of the scanned image. Leave as 0 to allow the scanner to use its default.
Contrast	The contrast of the scanned image. Leave as 0 to allow the scanner to use its default contrast levels.
Crop	If ticked, the scanner will ‘crop’ the blank edges of the scanned pages.
DPI	The resolution that the scanner will use when scanning, measured in DPI (dots per inch). The default is 300. A higher number will scan in more detail, but may take the scanner longer to process and result in larger file sizes.
Rotation	Rotation to apply to scanned pages, in degrees. The default rotation is 0 and can be set to 90, 180 or 270.
Scan Type	A choice between Black and white, Greyscale and Colour scanning. Black and white will result in the smallest file sizes and colour scans result in significantly larger file sizes (with greyscale lying between the two). The default is Black and white.
Straighten	If ticked, the scanner will automatically straighten the scanned image.
Blank Page Threshold	A choice between 1 and 10, with 1 being the lowest threshold. A higher threshold

	will cause the scanner to count more dark pixels before deciding that the page is not blank.
Ignore Hole Punches	If ticked, causes scans to ignore the outside inch of a page when deciding whether the page is blank.
Suppress Blank	If ticked, the scanner will use the Blank Page Threshold number to decide whether a page is blank. If this option is not ticked then the scanner will include all the scanned pages.
Quality Check & Append	If ticked, the scan setting will prompt you to 'approve' or 'discard' the image after each scan. You will also be given the option to append further pages to the image.
Show User Interface	If ticked, the scanner will show its own options window before the scan takes place. This will allow you to set your own custom settings before any scan.

The 'Save & Close' button is used to save the Scan Setting and close the options window. This button will not be available if any of the required settings have not been completed. If more information is required, the window will tell you in red text.

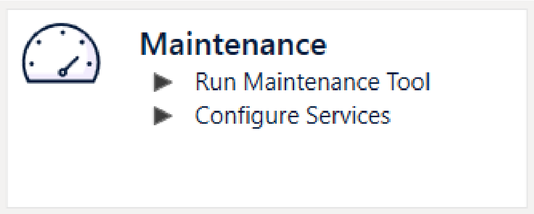
Here, the scanner description was left blank. The window states that the scanner description is required and disables the 'Save & Close' button until the scanner description has been supplied.



The window also has a 'Cancel' button. The Cancel button is always available. This button will revert the Scan Setting to before you made any changes and will close the window. If you are cancelling a new Scan Setting then it will not be created.

22 Maintenance

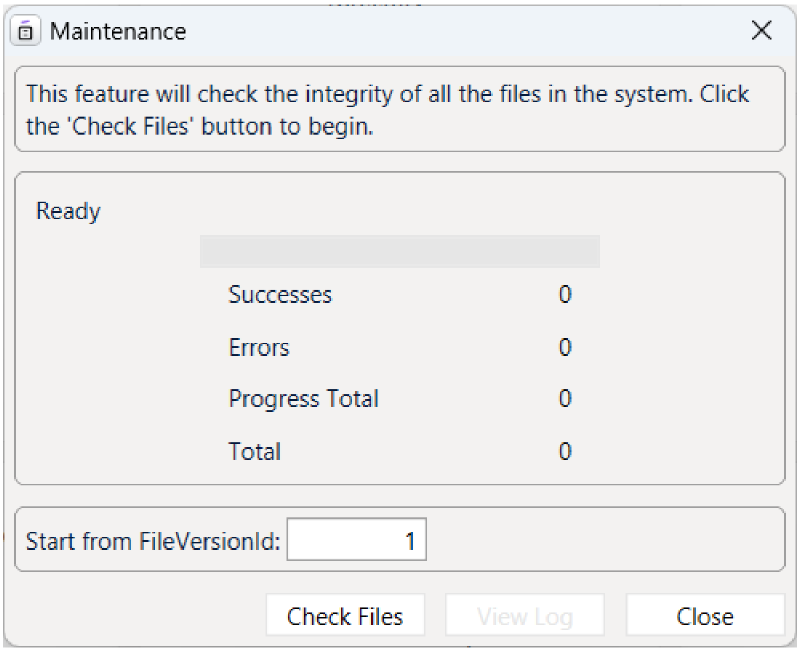
The Maintenance area in admin contains the following options:



22.1 Run Maintenance Tool

Run Maintenance Tool can be used to check perform the following actions:

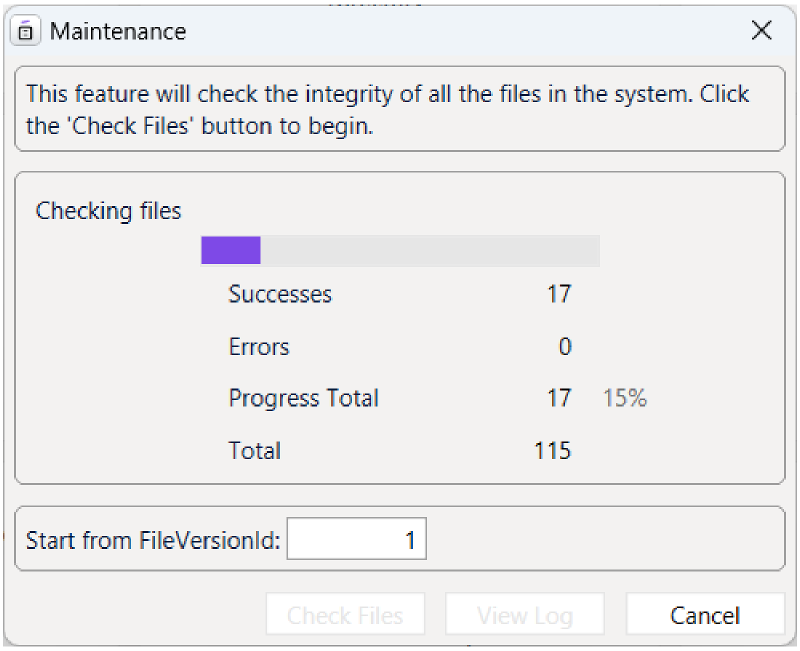
- Checks the integrity of the files stored in the system.
- Extracts Email MetaData for .EML and .MSG formats such as To:, From:, Subject: etc.
- Makes Email MetaData Searchable



The window contains a list of statistics and the options to begin the ‘Check Files’ process or cancel out of the window. The ‘View Log’ button is initially unavailable.

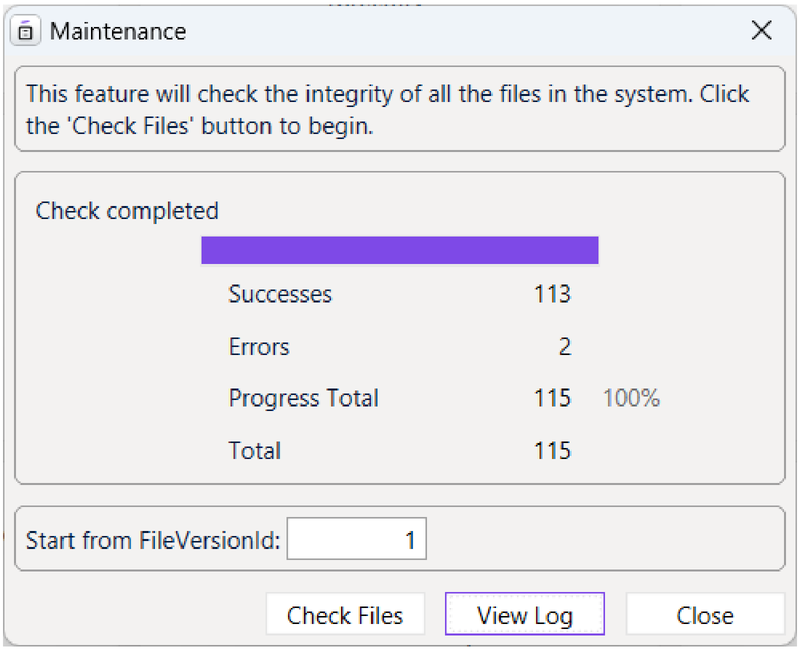
There is also the option to start processing files from a particular FileVersionID.

Click the ‘Check Files’ button to begin automatically checking the files in the system.

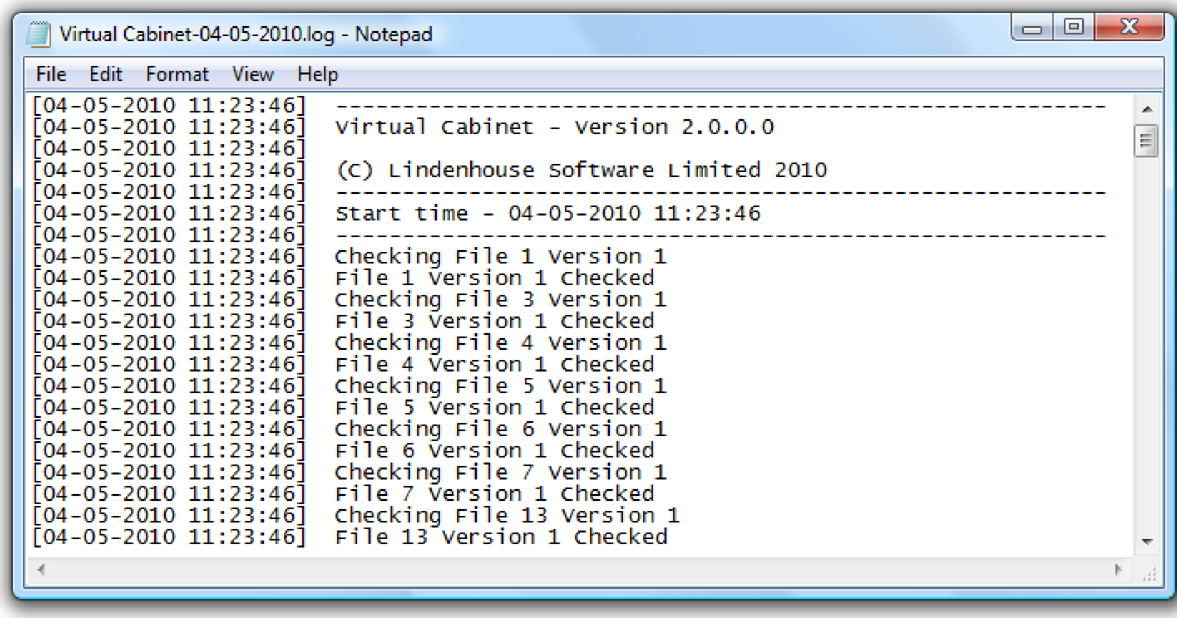


Progress is displayed while the files are being checked. The number of successfully checked files is listed, as is the number of errors encountered. The progress is shown as a percentage and the total number of files is also displayed. You have the option to cancel the process at any time.

The ‘View Log’ option becomes available once the checking process has been cancelled or has run to completion.



To view the log, click the ‘View Log’ button. The log is a text file that will open in a new window. You can use the details in the log to investigate any missing or altered files.



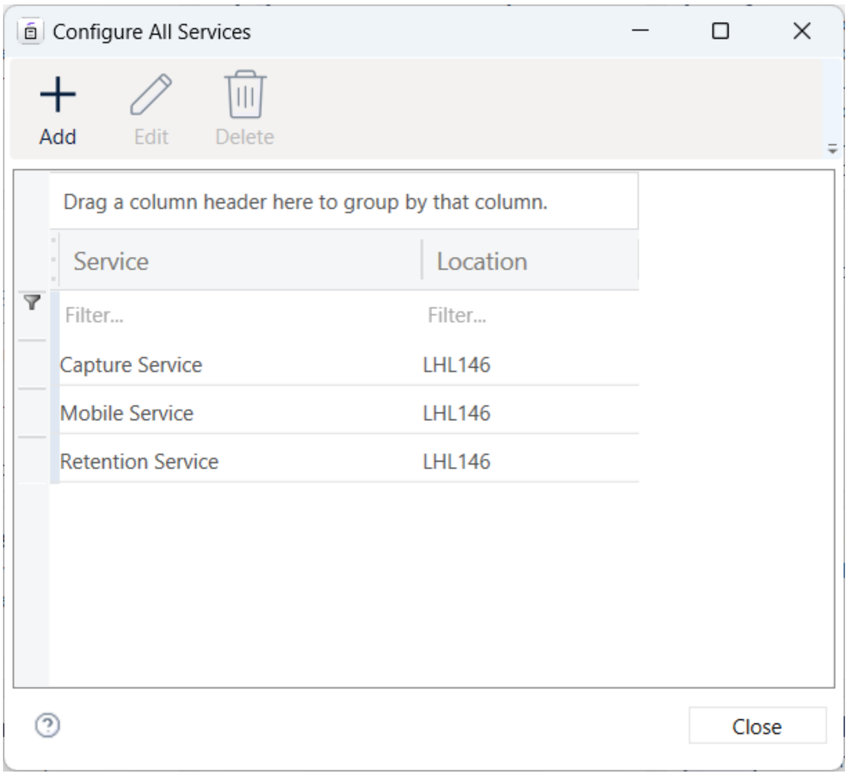
22.2 Configure Services

Configure Services can be used to configure instances of the Virtual Cabinet Capture Service, Mobile Service and Retention Service running on your servers.

See the Virtual Cabinet Email Capture Guide for more general information about the Capture Service and its capabilities.

The services are all self-registering on install and upgrade. The Configure All Services window will list all instances of each type of service.

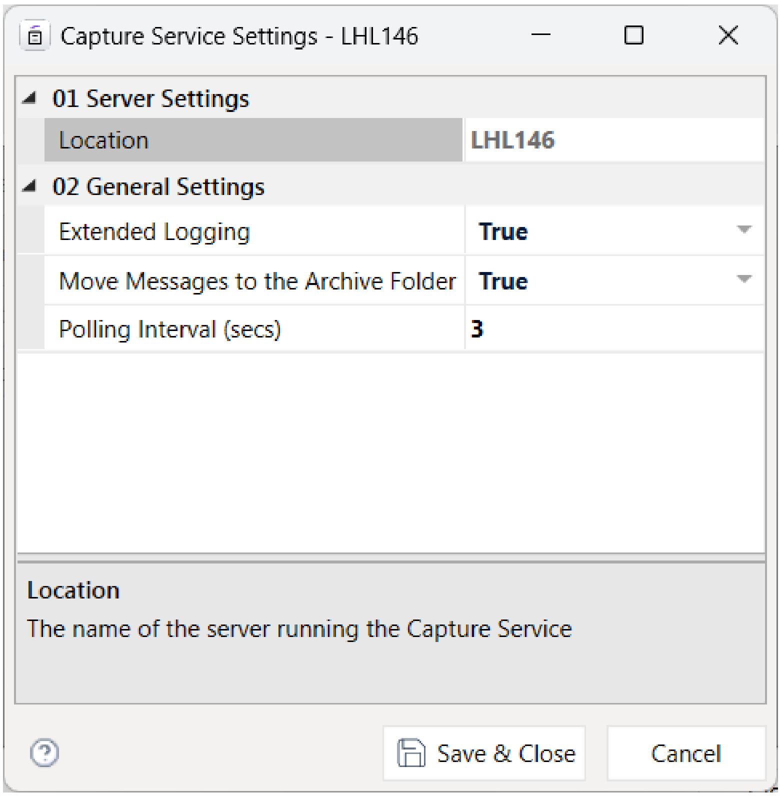
The Virtual Cabinet Capture Service, Mobile Service and Retention Service are self-registering. The Configure All Services window will list all instance of the Capture Service.



Each type of service requires different configuration options.

For the Retention Service see the section in this guide about Retention.

These are the options for the Capture Service:



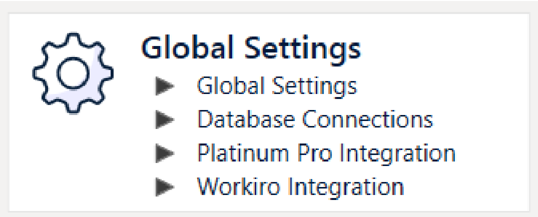
Property	Description	Required
Location	The name or I.P. address of the service on which the instance for the Virtual Cabinet Capture Service is running	Yes
Extended Logging	An option that provides additional logging information in order to help investigate any issues encountered by the Capture Service.	No
Move Messages to the Archive Folder	This is a default setting. It is recommend that this setting is turned on for performance reasons. Emails in the Journal Style mailbox used by the Capture Service will be archived to a sub-folder of the target folder after processing. Disabling this option results in emails being left in situ, but required the Capture Service to query the mailbox content to find unprocessed emails, which may take considerable time on mailboxes with a lot of items.	
Polling Interval	This is the frequency with which the Capture Service will poll the Journal Style Mailbox to check for new emails.	

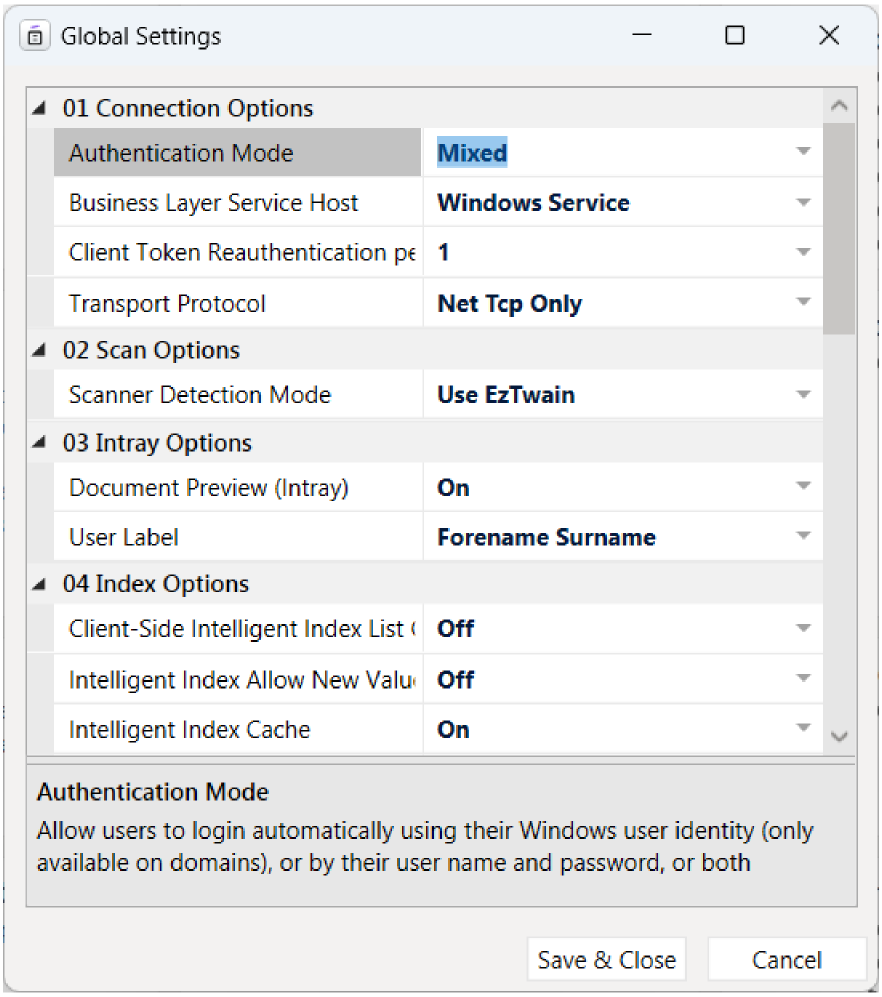
23 Global Settings

23.1 Global Settings

The Global Settings window enables you to view and change settings that will affect all the users of the system.

Global Settings can be accessed from the Admin Tab via the ‘Global Settings’ option.





<table>
<tr><th>Setting name</th><th>Description</th><th>Required</th></tr>
<tr><td>1 Connection Options</td><td></td><td></td></tr>
<tr><td>Authentication Mode</td><td>Determines whether the Virtual Cabinet client application will automatically attempt to log in when it is launched. To log in automatically, a Virtual Cabinet User must be associated with a Windows account on the domain. Users can be associated with Windows accounts in the Users section of the Admin area in Virtual Cabinet.
<table><tr><td>Mixed</td><td>A combination of username/password login and windows authentication can be used</td></tr><tr><td>User Name / Password</td><td>Users cannot automatically log on.</td></tr><tr><td>Windows Authentication</td><td>Users can only log in automatically, related to their Windows user</td></tr></table></td><td>Yes</td></tr>
<tr><td>Business Layer Service Host</td><td>The Virtual Cabinet server has services that can either be run in Internet Information Services (IIS) or as a Windows Service. If this setting is changed, each client will switch to the new services the next time they log in.</td><td>Yes</td></tr>
<tr><td>Client Token Reauthentication period (days)</td><td>The number of days that Virtual Cabinet should remember your log in credentials for if you are not using Windows Authentication. Useful for customers on a Workgroup rather than a domain that are often having to type in their username and password.</td><td>Yes</td></tr>
<tr><td>Transport Protocol</td><td>Specifies the protocols that Virtual Cabinet will use when communicating between the Clients and the Server. The choice of connection type can affect compatibility, performance and security. NetTcpBinding is the fastest transport protocol across intranet environments, provides two-way connection capabilities (enabling Client pop-up notifications), and makes use of authentication and encryption, but relies on a Windows Domain. After changing this setting, as each client logs on for the first time they will switch to the new protocol.</td><td></td></tr>
</table>

	Using "Net Tcp Only" will disable connections via the unencrypted Http method, and is recommended for Windows Domain environments.
2 Scan Options	
Scanner Detection Mode	Introduced for trouble-shooting purposes. Default should be left as Use Twain_32 unless connectivity issues are being experienced with Scanner Twain Drivers.
3 Intray Options	
Document Preview (Intray)	If set to On allows users to see a preview of the selected document in their Intray.
User Label	Sets the format of the names that appear in the list on the left-hand side of the Intray tab in the client application.

User Name	Lists each User by their User Name.
Forename Surname	Lists each User by their forename and surname, as entered for that User in the Admin area.
User Name (Forename Surname)	Lists each User by their User Name, followed by their forename and surname in brackets.

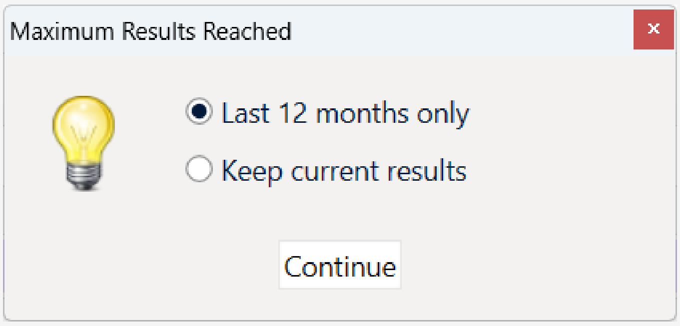
4 Index Options	
Client-Side Intelligent Index List Caching	See the section on Intelligent Indexing for more detail.
Intelligent Index Allow New Values	Intelligent Indexing can use reciprocal relationships. A value selected in one list can affect the values available in another list, and vice versa. When a reciprocal relationship is in effect, you cannot enter values that are not in the list, even if the Limit to List setting on the Index Field is turned off. Turning Allow New Values to On, overrides this behaviour and allows new values to be entered in index fields associated with

	Intelligent Indexing configuration that has a reciprocal relationship.
Intelligent Index Cache	See the section on Intelligent Indexing for more detail.
Intelligent Index Cache Life	See the section on Intelligent Indexing for more detail.
Intelligent Index in Search	See the section on Intelligent Indexing for more detail. Forces Intelligent Indexing Linked Lists to operate the same way in the Search Criteria panel as they do in the Indexing screen.
Version Change Description	If enabled, users will be prompted to enter a description of the changes when saving new versions of documents.
5 Search Options	
Client-side List Caching	Introduced for trouble-shooting purposes. If set to Off, forces the client to rebuild lists in memory every time and Index field associated with a list is displayed. Setting should be left On unless otherwise directed.
Document Preview (Search)	If set to On, allows users to see a preview of the selected document in the Search area.
Force join order	If set to On, forces SQL Server to perform search queries using the order of the tables in the joins when document Indexes are specified in a search. Can help with search performance at sites where SQL Server execution plans are not generated optimally.
Keyword Search	This option specifies what happens when a search is performed in the main search bar in Virtual Cabinet.

Use Database	Performs searches by looking through the indexes in the database.
Use Content Search Engine	The Virtual Cabinet content engine will be used to return results. Search results are generally returned much more

	quickly when “Use Content Search Engine” is selected but the results may differ until the Indexing Engine has fully indexed all documents.
Use Database (Inverted Index)	Performs searches using the database, but maintains an ‘inverted index’ table. This allows the search to look up indexes more quickly when a User performs a Keyword search.

(Note: Advanced searches will always use the database)

Mandatory Search Term	If set to On then users will be required to enter at least 2 characters in the keyword search field if not advanced criteria are selected. This is to minimize the use of expensive blank searches across the whole filing cabinet.
Max Search Results	Sets the maximum number of search results that will be displayed in the Client application when a user searches. A larger number will cause more search results to be displayed but may run more slowly.
Max Search Warning	If set to On then when a search returns the maximum number of search results, a prompt is displayed to help the user find the most relevant documents by refining their search results to only include documents from the last 12 months. 

6 Document Creation Options

Template Filing Cabinet	Specifies the Filing Cabinet that will be used to store Templates for Document Creation. See the Document Creation Guide for further information.
Template Naming Rule	Specifies the name that a template will be given in various scenarios such as in the Recently Used Templates list. For information on how to specify a File Name Rule, please see the File Name Rules section below.
7 Display Options	
Filter Max Drop Down Items	Sets the number of items in a Virtual Cabinet List before the filtering is enabled. If filtering is always required set to 0. If filtering is never required set to a high value (e.g. 999999).
Filter Max Folders	Sets the number of items in a Virtual Cabinet Folder structure before filtering is enabled. If filtering is always required set to 0. If filtering is never required set to a high value (e.g. 999999).
Max Drop Down Items	Sets the maximum number of drop down items to display in a list.
Max Recent Options	Sets the maximum number of recently selected options that will appear in drop-down list in parts of the Client application. A larger number will cause more recently selected options to be displayed but may run more slowly.
8 Export Options	
Copy Link Format	Determines how the vclink looks when pasted into text fields. Some programs support the Markdown format (e.g. Workiro) which allows you to specify a friendly name for the link to the document, whereas others (e.g. adding a Word hyperlink) expect just the link.
Edit/Email/ Extract File Name Rule	Specifies the default file name that will be suggested when a User chooses to extract a document from the system and the name that will be used when:

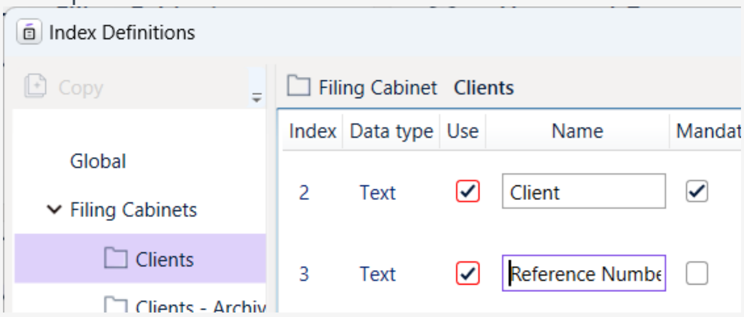
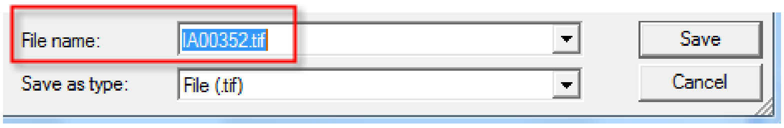
	• attaching documents to emails, • viewing documents in the viewer, • opening documents for editing, • labelling the display name of shortcuts. For information on how to specify a File Name Rule, please see the File Name Rules section below.
Printer Select File Formats	Enter semi-colon separated file extensions for file formats that print silently and so require a printer selection dialog.
9 Miscellaneous	
Discover New Features	Allow users to discover new features throughout the product that are not enabled by default. These features will direct you to our website where you can find out more information about their benefits.
Help Resource Path	Specifies a file path relative to the client application. The Virtual Cabinet client will open this file when the user either clicks 'Help' under the Orb or the '?' in the top-right corner of the application.
Discover Website	Sets the home page of the browser in the Discover tab. The choices are Virtual Cabinet Support or Reseller Support. Reseller Support will remove references to direct Virtual Cabinet support contact details.

23.1.1 File Name Rules

'File Name Rules' enable an administrator to specify the default naming convention and short display name for documents in and leaving the Virtual Cabinet system.

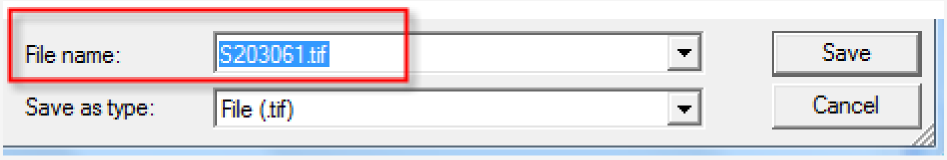
23.1.1.1 Using an Index as a Default File Name

To use a document index as the file name, enter the name of a column-header as it appears at the top of the search results. When a column-header is found, it identifies the column that should be used to name the file.

Example: Set the Default File Name as the 'Reference Number' index.	
Step 1	Make sure that an index with a name of Reference Number has been set up: 
Step 2	Type `Reference Number` in the File Name Rule under Global Settings, then Save and Close
Step 3	Find a search result with a Reference Number
Step 4	Extract or e-mail the document to see that the file is now named after the Reference Number: 

23.1.1.2 Use alternative choices of Index for the Default File Name

The ‘vertical pipe’ `|` can be used to specify alternative document indexes. The ‘pipe’ is the upper-case key next to ‘Z’ on the keyboard and it effectively represents an ‘or’. Alternative names are checked in left-to-right reading order, and the File Name Rule uses the first one it can match to an index, discarding the rest.

Example: Set the Default File Name as the ‘Claim Number’, or, if there isn’t one on this type of document, use ‘Account Number’	
Step 1	In Global Settings, set the File Name Rule as `Claim Number|Account Number`, meaning “try to use Claim Number, but if that index can’t be found then use Account Number”.
Step 2	Find a search result that has a column-header of Claim Number or Account Number.
Step 3	Extract or e-mail the document and see that the file name is the Claim Number if there was one, or alternatively the Account Number. 

23.1.1.3 Write directly into the Default File Name

Quoted text (text surrounded by speech marks) can be used to write text directly into the Default File Name. Quoted text will always count as a 'match', in the same way as an index would if it was found.

Example: Set the Default File Name so it always says 'Important document'	
Step 1	In Global Settings, Enter a File Name Rule of `"Important document"` (including the speech marks), then Save and Close.
Step 2	Export or e-mail any document to see that the Default File Name is now always "Important document".

Example: Set the Default File Name as the 'Document Title', or, if there isn't one on this type of document, just call it 'Important document'	
Step 1	In Global Settings, Enter a File Name Rule of `Document Title|"Important document"` (including the speech marks), then Save and Close.
Step 2	Extract or e-mail a document to see that documents with a Document Title index will use that title. Documents without a Document Title will suggest "Important document" as the Default File Name.

23.1.1.4 Multi-part Default File Names

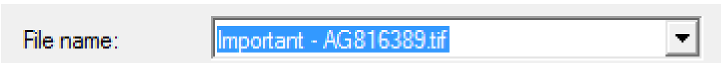
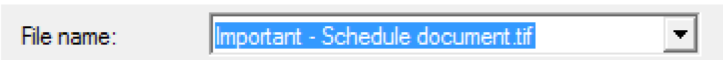
Curly braces `{` and `}` can be used to help build up multi-part file names such as a title followed by a hyphen and then the document reference number.

The curly braces define 'scope' while reading the Default File Name. When reading inside a set of braces, only the part of the File Name Rule inside those braces is considered. That is, any indexes or quoted text will count as a 'match' and everything else will be ignored, but only up to the closing brace.

This can be used to link ‘matches’ together into chains that represent complex file names.

Example: Set the Default File Name as the Document Title followed by a hyphen and then the Reference Number	
Step 1	In Global Settings, Enter a File Name Rule of `{Document Title}" - "{Reference Number}`, then Save and Close.
Step 2	Export or e-mail any document to see that the Default File Name is now the Document Title, a hyphen and then the Reference Number. 

Example: Set the Default File Name as the File Id, followed by the Version number in brackets	
Step 1	In Global Settings, Enter a File Name Rule of `{FileId}" ( "{Version}" ) "`,then Save and Close.
Step 2	Export or e-mail any document to see that the Default File Name is now the File Id, followed by the Version number in brackets. 

Example: Set the Default File Name as ‘Important - ’, followed by the Reference Number. If there isn’t a Reference Number then use the Document Title instead.	
Step 1	In Global Settings, Enter a File Name Rule of `"Important - "{Reference Number|Document Title}`, then Save and Close.
Step 2	Extract or e-mail a document to see that documents with a ‘Reference Number’ will use that index.  Documents without a ‘Reference Number’ will use the ‘Document Title’ instead. 

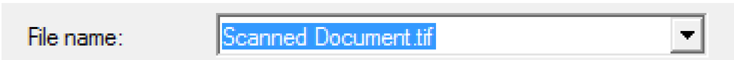
Conditional Text

Default File Names can contain text that is only written when a condition is met. This is useful for creating a File Name Rule that can apply across multiple Cabinets containing different types of indexing data.

Any unquoted text that follows a closing brace `}` will only be written into the resulting file name if a 'match' occurred inside the preceding braces. If a match has occurred inside the braces then the match and the following text will both be written into the file name.

This can be thought of as:

{if this text was written} then also write this text

Example: If there is a Response Code then set the Default File Name as the Response Code, followed by ' for response'. Otherwise, just default to the Original File Name.	
Step 1	In Global Settings, Enter a File Name Rule of `{Response Code} for response`, then Save and Close.
Step 2	Extract or e-mail a document to see that documents with a 'Response Code' will use that index.  Documents without a 'Response Code' will default to the 'Original File Name' instead. 

When a closing brace is followed immediately by a question mark `?` then the Default File Name evaluates the text inside the preceding braces but does not write any matches into the resulting file name. Instead, only the unquoted text that follows the question mark is written.

{**if this matches**}?**then write this text**

Example: If there is an Account Number then set the Default File Name to 'Client Document'. Otherwise, just default to the Original File Name.	
Step 1	In Global Settings, Enter a File Name Rule of `{Account Number}?Existing Client`, then Save and Close.
Step 2	Extract or e-mail a document to see that documents with an 'Account Number' show "Existing Client".  Documents without an 'Account Number' will suggest the 'Original File Name' instead. 

Alternatively, a question mark can be followed by another opening brace. The Default File Name will evaluate the text inside the first set of braces and will only enter the following set of braces if the first set resulted in a match.

If there is a match inside the first set of braces then the text inside the second set of braces will be written. Otherwise, none of the text will be written into the file name.

{**if this matches**}?{**then evaluate this and write the result**}

Example: If there is a Reference Number then write 'Ref. ', followed by the Reference Number. Otherwise, just default to the Original File Name.	
Step 1	In Global Settings, Enter a File Name Rule of `{Reference Number}?{{"Ref. "}{Reference Number}}`, then Save and Close.
Step 2	Extract or e-mail a document with a 'Reference Number' to see a file name of "Ref. ", followed by the 'Reference Number'. 

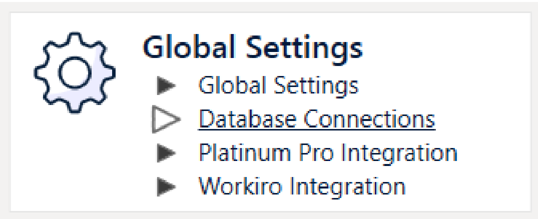
Documents without a 'Reference Number' will suggest the 'Original File Name' instead.

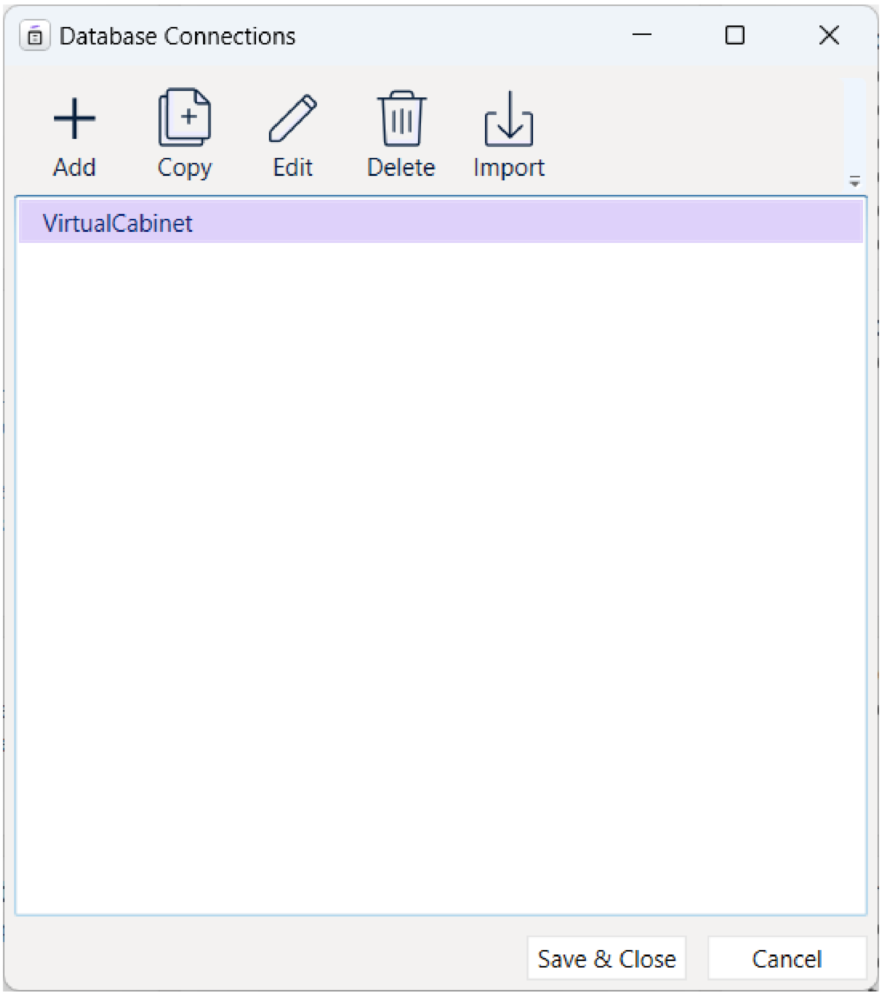
23.2 Database Connections

The Database Connections window enables you to add, view and edit Microsoft SQL Server database connections used in conjunction with:

- Intelligent Indexing
- Portal Contact Integration
- Document Creation

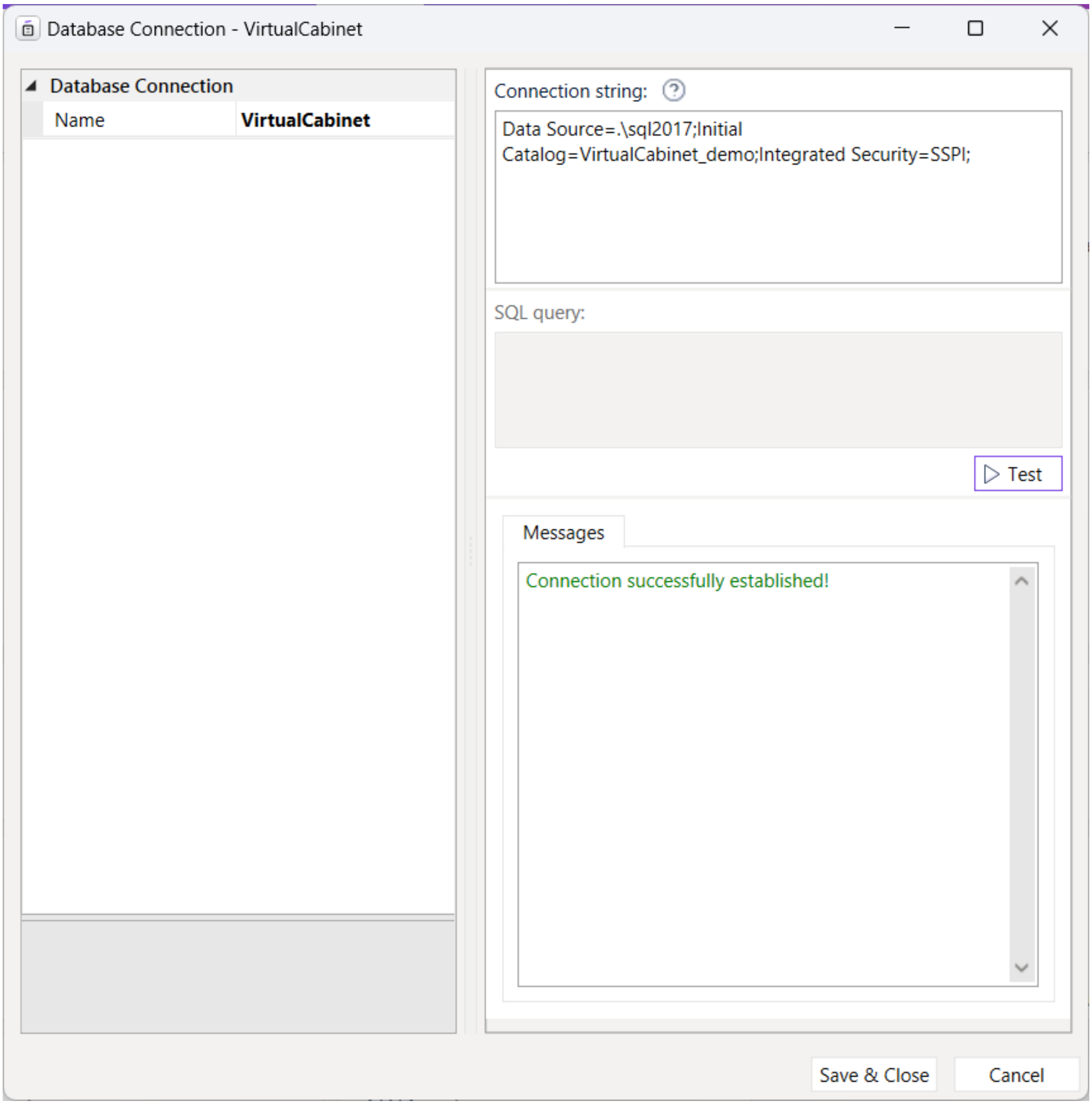
Database Connections can be accessed from the Admin Tab via the 'Database Connections' option.





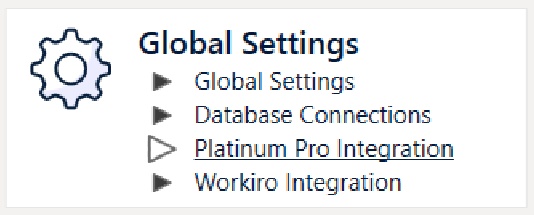
You can click 'Add' to create a new Database Connection. Alternatively, you can edit an existing Filing Cabinet by double-clicking on one or by selecting one and clicking the 'Edit' button.

You can provide a name for the Database Connection, a Connection String to the Microsoft SQL Server Database and use the 'Test' button to test the connection.


Database Connection - VirtualCabinet
Database Connection
Name
VirtualCabinet
Connection string:
Data Source=.\sql2017;Initial Catalog=VirtualCabinet_demo;Integrated Security=SSPI;
SQL query:
Test
Messages
Connection successfully established!
Save & Close
Cancel

23.3 Platinum Pro Integration

The Platinum Pro integration enables you to configure how the integration with Platinum pro searches on documents in VC.



There are four different types of entities within Platinum Pro:

- Member
- Group
- Scheme
- Property

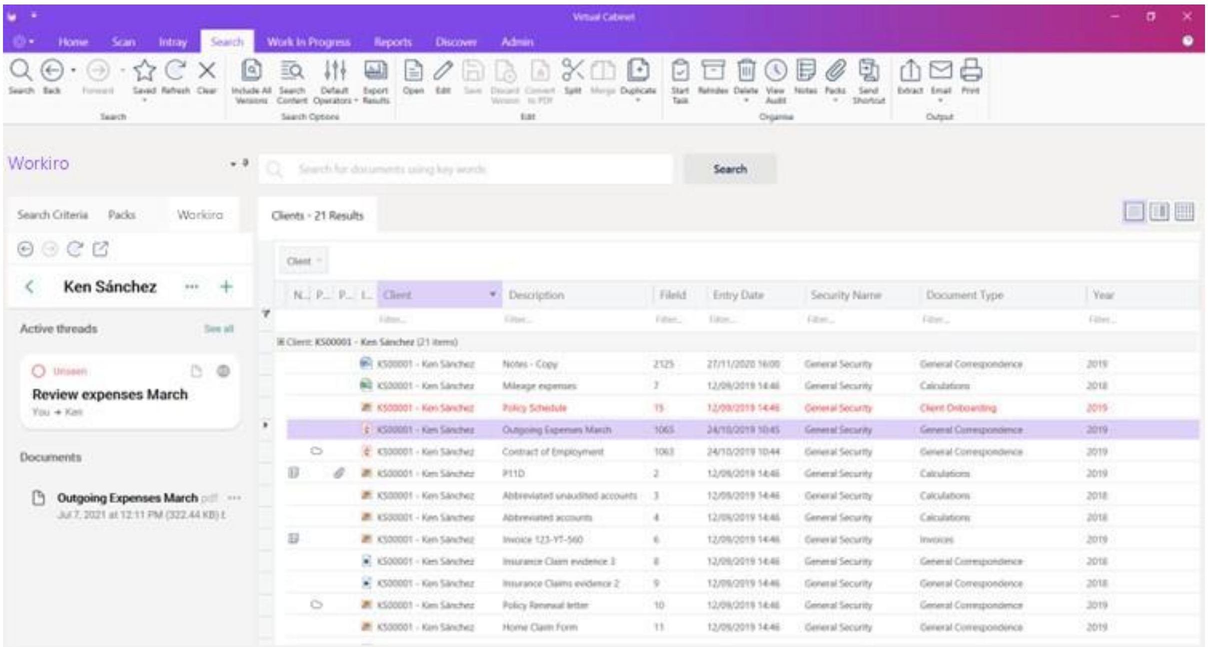
Document can be related to any of these things, and in Platinum Pro there is a search button to return related Virtual Cabinet documents. For example, if you are in a Member called “Bob Smith” the search button will return all documents in VC related to “Bob Smith”.

For each type of entity you can choose which Filing Cabinet the Platinum pro integration searches on, and the index that the associated ID for that entity is located in. E.g. for members search in the Filing Cabinet called “Clients” and use INDEX03 to search for Member ID.

23.4 Workiro Integration

The Workiro integration brings the features of Workiro in to Virtual Cabinet so that they can be used together, helping data flow between each system.

This area of the system is used to configure the integration so that when you are searching for client documents you can see the related work in Workiro for that client. Also, when you are sending documents from VC to Workiro they are automatically related to the corresponding client in Workiro.



Note: the Workiro Windows app must be installed in order for the user to see the Workiro panel in the search screen.

The integration works by matching a client ID stored against the documents in VC to an ID stored against the connection in Workiro. If a connection with the ID doesn't exist it will prompt to create it.

In order to set up the integration you must first configure where the ID is stored in Workiro. Note: this may already be set up.

Setup a Relationship Type in Workiro:

a. In Workiro go to Settings → Relationship Types
b. Click New to create a new Relationship Type
c. Give it a Name, e.g. "Client"
d. Add a Property and call it something like "Client ID"
e. Click Create to create that Relationship Type.

The next step is to configure Virtual Cabinet so that it knows where to find the ID on the document to match the Workiro connection. There are two ways of achieving this:

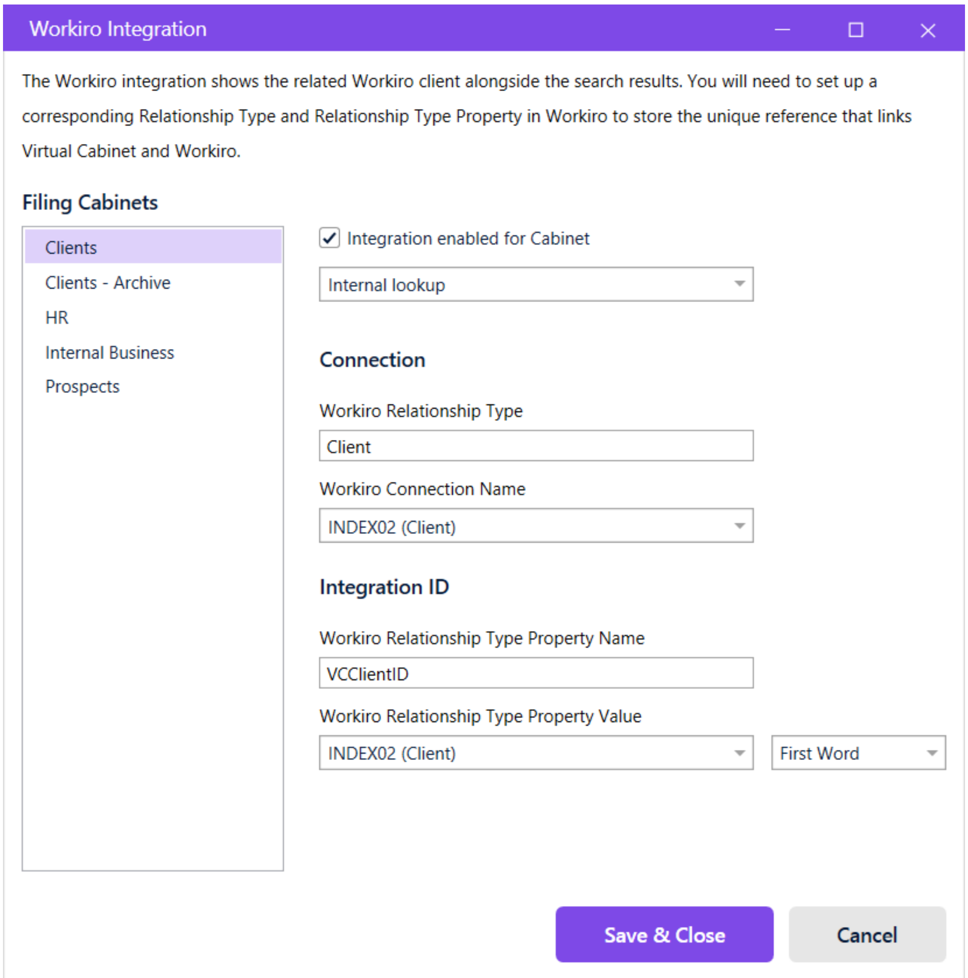
1. **Internal lookup** - get the ID from one of the document indexes stored in Virtual Cabinet.
2. **External lookup** - use document indexes to lookup the information about the connection from a third-party system. For example, lookup the email address, first name, and last name in order to create a new connection with the relevant information in Workiro from VC.

23.4.1 Internal lookup

- Open VC → Admin tab
- Open Workiro Integration
- From the list on the left choose a Filing Cabinet that has client documents in it and you want to link to Workiro
    a. You can setup the integration for any number of Filing Cabinets you have that contain client documents.
- Enter the “Workiro Relationship Type” - this is what we created above and is probably called “Client”.
- Enter the “Workiro Connection Name” - this is the VC index that contains the client name. This client name will be used to create new connections in Workiro if they don’t already exist. Select from a drop down list of indexes appropriate to that Filing Cabinet. E.g. “Client Name”, “Client”, or “Client Code & Name”
- Enter the “Workiro Relationship Type Property Name” - this is the property we created above in Workiro to store the unique client ID that will match both systems together. Probably called “Client ID”
- Enter the “Workiro Relationship Type Property Value” - this is the VC index that contains the unique client ID that we will store in Workiro and use to match the VC client with the Workiro connection. E.g. “Client Code”, “Client ID”, “Client Code & Name”.
    a. If the index you’re using contains more than just the Client ID (e.g. a concatenation of client ID and client name) then use the second field on the left to specify where in the index the client ID can be found; is it the “First Word”, “Last Word”, or the “Full Value”.
- Tick “Integration enabled for Cabinet”

23.4.2 External lookup

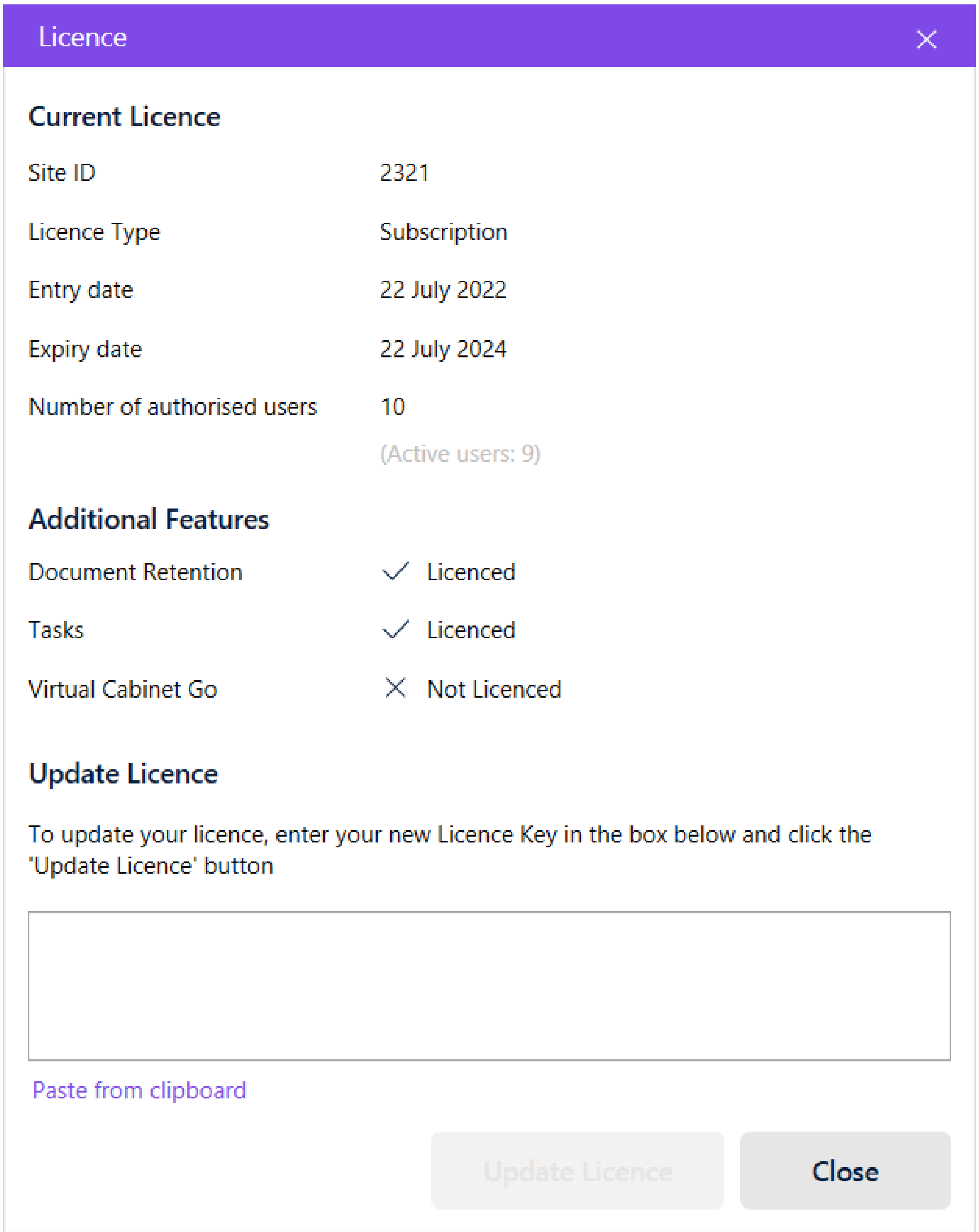
- Open VC → Admin tab
- Open Workiro Integration
- From the list on the left choose a Filing Cabinet that has client documents in it and you want to link to Workiro
    a. You can setup the integration for any number of Filing Cabinets you have that contain client documents.
- Enter the “Workiro Relationship Type” - this is what we created above and is probably called “Client”.
- Enter the “Workiro Relationship Type Property Name” - this is the property we created above in Workiro to store the unique client ID that will match both systems together. Probably called “Client ID”
- Enter the connection string for the third-party SQL database to query to find more information about the connection.
- Write a query that returns information about the connection based on the document indexes. You reference document indexes in the query by using the placeholder (‘INDEX02’); changing 02 for the index number you need.
    a. The query should only return one row. If multiple are returned VC will use the first one.
    b. The query must return the columns: ID, Type, OrgName, FirstName, LastName, Email
        i. **ID** - this is the ID that matches with the Workiro connection via the Relationship Type Property.
        ii. **Type** - this is either “person” or “organisation”. This is mandatory
        iii. **OrgName** - if the type is organisation then enter the name of the organisation.
        iv. **FirstName** - if the type is person then enter the first name of the person; not mandatory.
        v. **LastName** - if the type is person then enter the last name of the person; not mandatory.
        vi. **Email** - FirstName - if the type is person then enter the email address of the person; this is mandatory.



Note: A Relationship Type is how you classify the different types of connections in Workiro and your relationship with them. For example, Pencils Ltd might be a client of yours, so you would give them a Relationship Type of “Client”. These Relationship Types can also be given unique properties, so that you can further define information about a “Client”. For most customers I would recommend setting up a Relationship Type of “Client” with a property called “Client ID”. This “Client ID” will be used as the unique reference that matches a client in VC with a connection in Workiro.

24 Licence Window

The Licence window is accessed by clicking on the 'Manage Licence' link.



The window contains two main sections labelled Current Licence and Update Licence.

24.1 Current Licence

This section displays the Site ID (for our reference), the date that the current licence was entered, the date that the current licence is due to expire and the number of active users that that the licence is authorised to allow.

It also displays records of any additional features that are licensed, for example Document Retention and Virtual Cabinet Go.

When the maximum number of users has been reached, you will be prevented from adding more users to the system. At this point, you can add more users by purchasing an upgraded licence or by setting some active users to ‘deleted’. Deleted users do not count towards the number of authorised users but will not be able to log onto the system while they are marked as deleted. You can delete or undelete a User at any time, licence permitting.

24.2 Update Licence

This section allows you to enter a new licence key and update the licence for your system. The new licence key should be pasted into the empty text box and you can then click the ‘Update Licence’ button to replace the current licence with the new licence.

If you update the system with a new licence, please ensure that you paste the whole licence key into the text box and that you use a valid licence key. Failing to do so may result in users being unable to access the system.

25 Custom Extensions

Custom Extensions provide a way of extending the functionality of Virtual Cabinet® using custom Microsoft .NET C# code. The custom code can be embedded in Virtual Cabinet itself and/or maintained in external assemblies that are then referenced from within Virtual Cabinet.

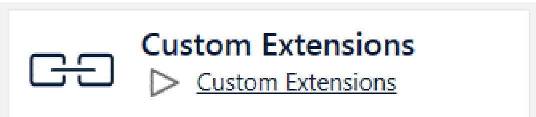
Custom Extensions can be invoked by Events within Virtual Cabinet®. The initial release of Custom Extensions provides Events to extend the Index and ReIndex functions.

Custom Extensions are server-based and executed by the currently connected Virtual Cabinet® Business Layer Service and/or Web Service.

Thanks to the ability to use any .NET C# code, the possibilities of what can be achieved are infinite. Some example use cases are as follows:

- Notifications
- Custom Security Rules
- Integration with External Databases and Systems
- Index Value Lookups
- Automatic Export

The Custom Extensions configuration is accessible by clicking the 'Custom Extensions' link.



Access to the Custom Extensions module of Virtual Cabinet is password protected. Use of the functionality by the uninitiated is not recommended. The password is available to any Virtual Cabinet Client that wishes to have it, but only following the signed return of the document **Virtual Cabinet Custom Extensions Guide.pdf** (Available on Request). Ask your Account Manager to publish it to you via the Virtual Cabinet Portal so that you can sign online!

26 Document Creation

Document Creation provides a way of creating new documents based on Templates stored in Virtual Cabinet®.

A Virtual Cabinet® Filing Cabinet can be configured to store Templates in many different formats, such as Microsoft Word and Excel.

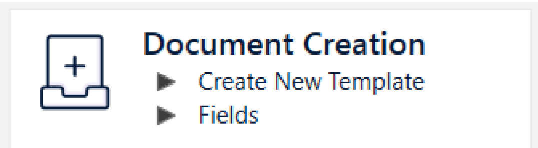
Templates can be associated with Field Groups and Index Settings.

Fields and Field Groups provide a way of requesting information about the document being created. In the case of Microsoft Word Templates, Field data can be merged into the document being created.

Indexing Settings can be configured to Index the document being created, either in part or in full.

See the Document Creation Guide for further information.

Once Document Creation has been initialised, further setup such as Fields, Field Groups and New Templates can be performed via the Admin Tab.



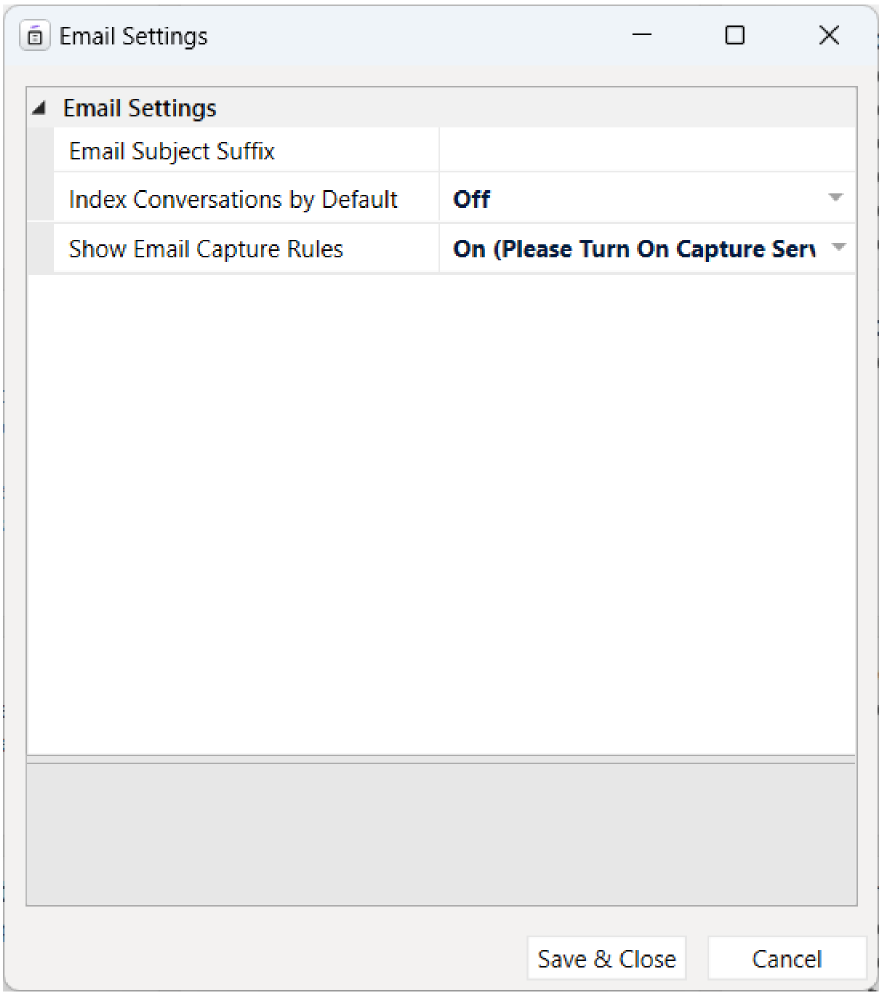
27 Email

The Email area of the Admin tab is dedicated to the configuration of Email related functionality in Virtual Cabinet.

See the **Virtual Cabinet Email Capture Guide** for further information on the functionality available.

27.1 Configure Email Settings

Configure Email Settings allow you to specify settings relating to the use of the Microsoft Outlook Addin to capture email messages into Virtual Cabinet.



Email Subject Suffix	Appends the specified value to the end of the subject line of emails indexed using the Virtual Cabinet Indexing Pane in Microsoft Outlook.
Index Conversations by Default	Sets the default state of the ‘automatically capture this conversation’ checkbox when indexing an email from the Outlook Addin

Show Email Capture Rules	Can be turned on or off to enable users to create rules that index whole email conversations using the Virtual Cabinet Indexing pane in Microsoft Outlook.

27.2 Configure Email Services

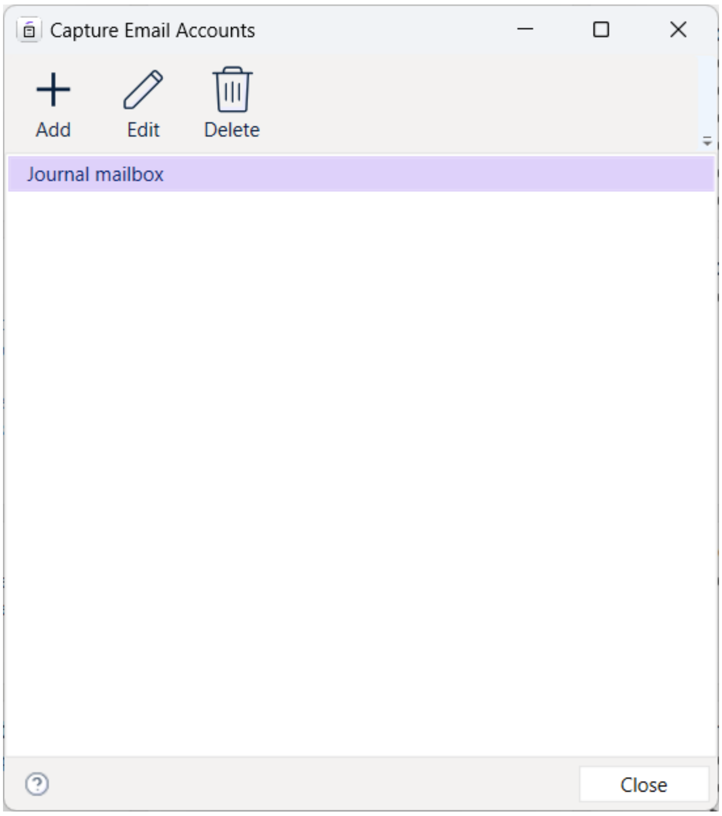
Configure Email Services is a shortcut to Configure Services, with a Capture Service filter applied.

Although not yet implemented, it is intended that all Virtual Cabinet Services configuration will be performed by via the Admin tab. Until then, you're right, it's the same feature with a slightly different name.

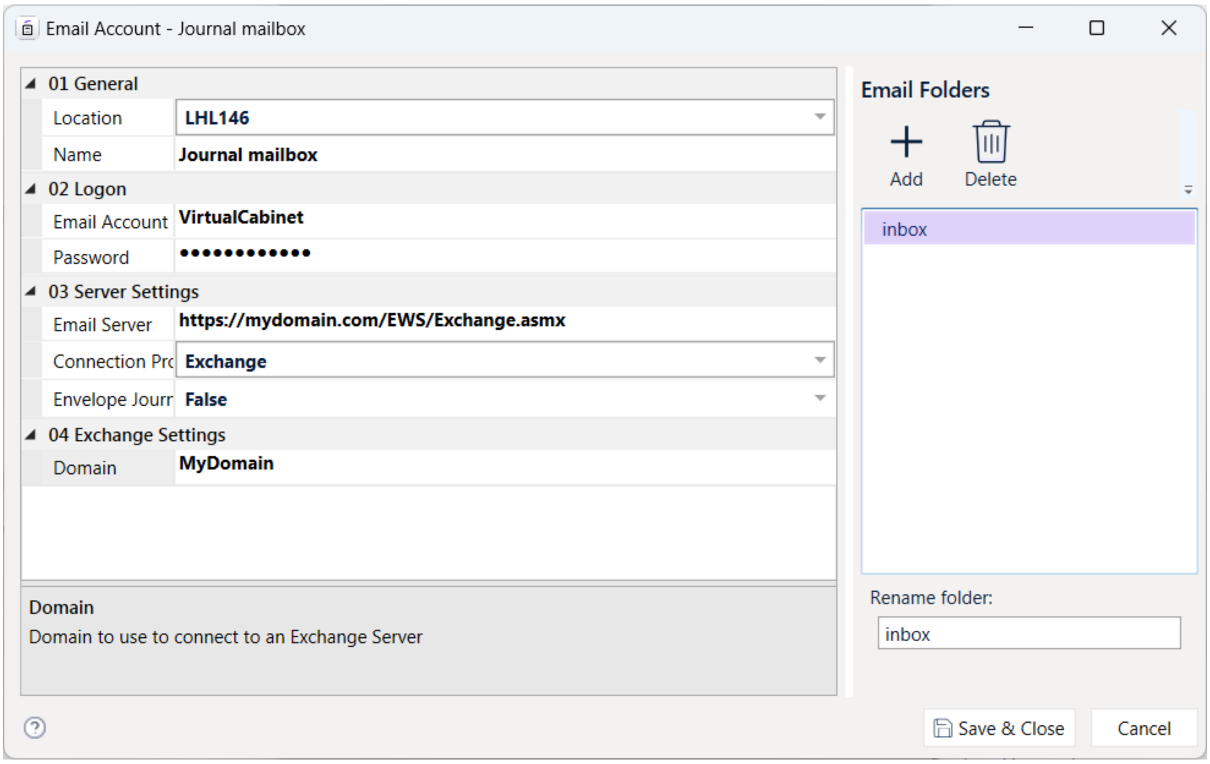
27.3 Capture Email Accounts

Capture Email Accounts are Mailbox Accounts that are polled by the Capture Service for new emails.

An instance of the Capture Service can poll multiple Accounts, but usually there would only be one Journal Style Mailbox Account per company, and this is the recommended configuration.



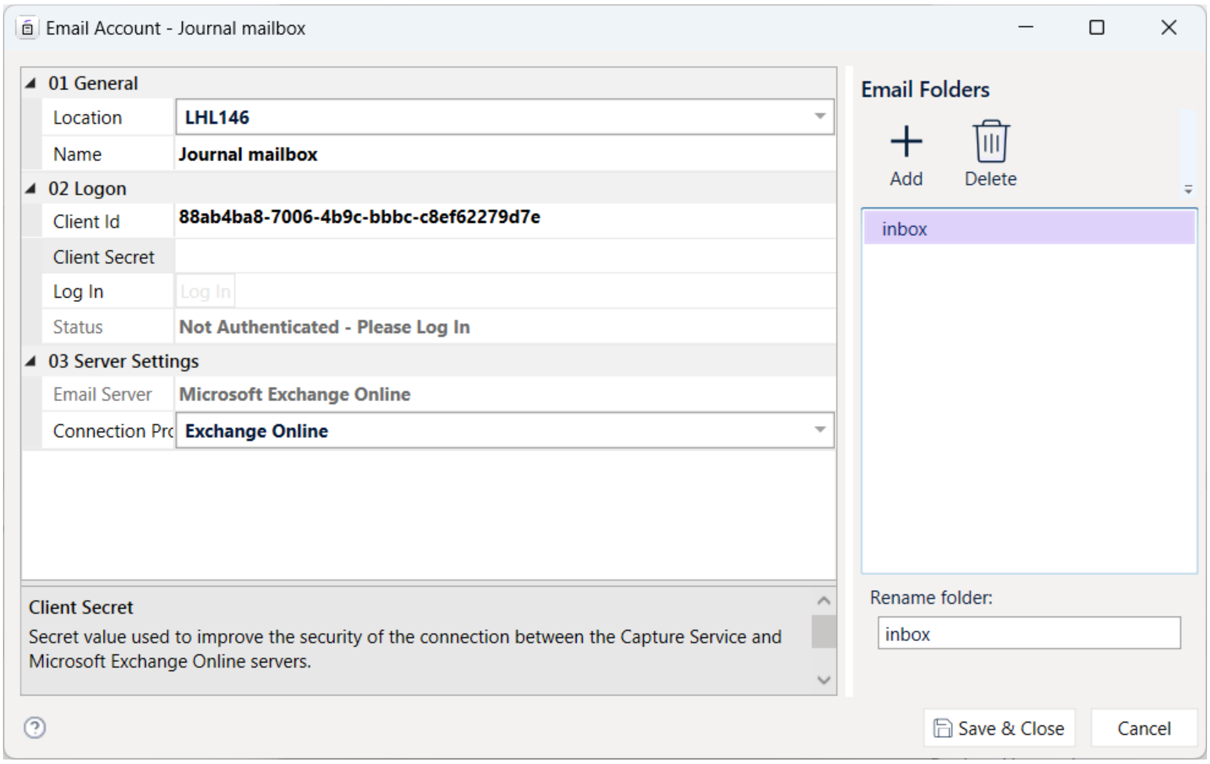
Each Email account has the following settings:



Setting name	Description	Required
Location	The Capture Service responsible for processing the emails in this Account.	Yes
Name	A descriptive name for the Account	Yes
Email Account	The Mailbox Account Username	Yes
Password	The password for the specified Mailbox Account Username	Yes
Email Server	The name of the Email Server.	Yes
Connection Protocol	The connection protocol used to connect to the Mailbox Account. Exchange Online has a different set of settings, see below.	Yes
Envelope Journal	If the Mailbox Account is a Journal Style Mailbox using Enveloping (default for Microsoft Exchange 2010 and later) then you will need to tick this option. Enveloped emails appear as attachments within another email.	No
Domain	The domain on which the Mailbox Account resides. In most cases, this is the name of the internal windows network. It adds context to the Email Account value	Yes
Folders	As Mailbox Accounts can contain multiple folders, it is possible to configure specific folders to be processed by the Capture Service. However, a	

	Journal Style Mailbox only ever has an inbox folder, in which all emails coming in and going out of the organisation will be stored. i.e. The single default folder of **inbox** is all that is required for most configurations.	

If you are using **Exchange Online** (part of the Office 365 suite of products) connection protocol, then you will see these options instead:



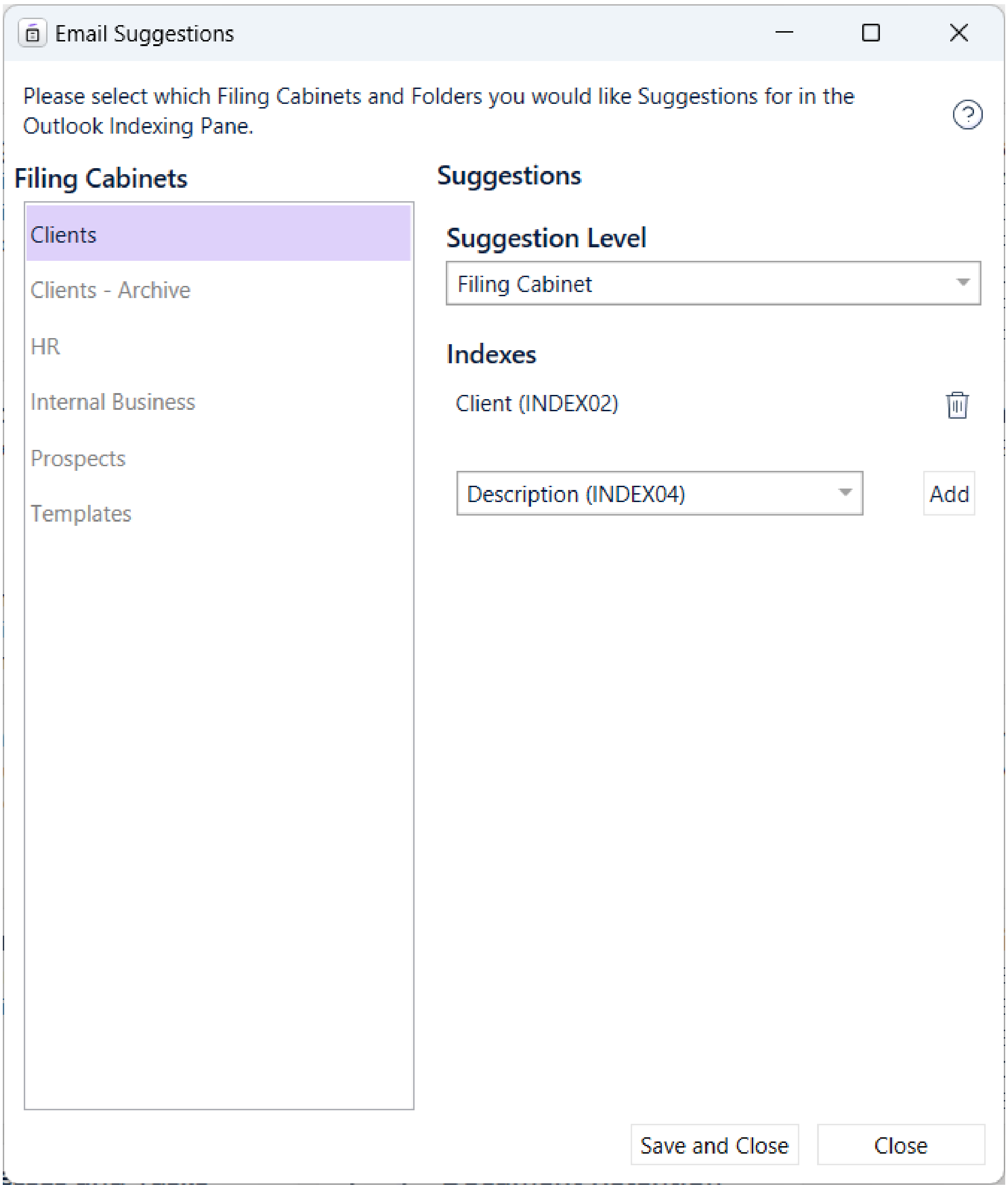
Setting name	Description	Required
Log In/Sign Out	Log in to the Microsoft account that has a copy of all your incoming/outgoing emails. This will launch a separate window asking you for your Microsoft account details, and may require MFA. If you have already logged in previously then you will see the Sign Out button to forget those details and log in with a different account.	Yes
Status	If you have not logged in then this will say “Not Authenticated”, and you should use the Log In button above. If you have already logged in, then this will tell you which email address the Capture Service is authenticated against.	Yes

Email Server	You do not need to change	Yes

27.4 Configure Email Suggestions

Email Suggestions appear in the Outlook Addin Indexing Pane in order to provide suggestions of indexes that this email could be associated with. Suggestions are based on the first email address and the emails already in Virtual Cabinet that have the email address in them.

Click **Configure Email Suggestions** to configure which Filing Cabinets and indexes should be suggested to the user.

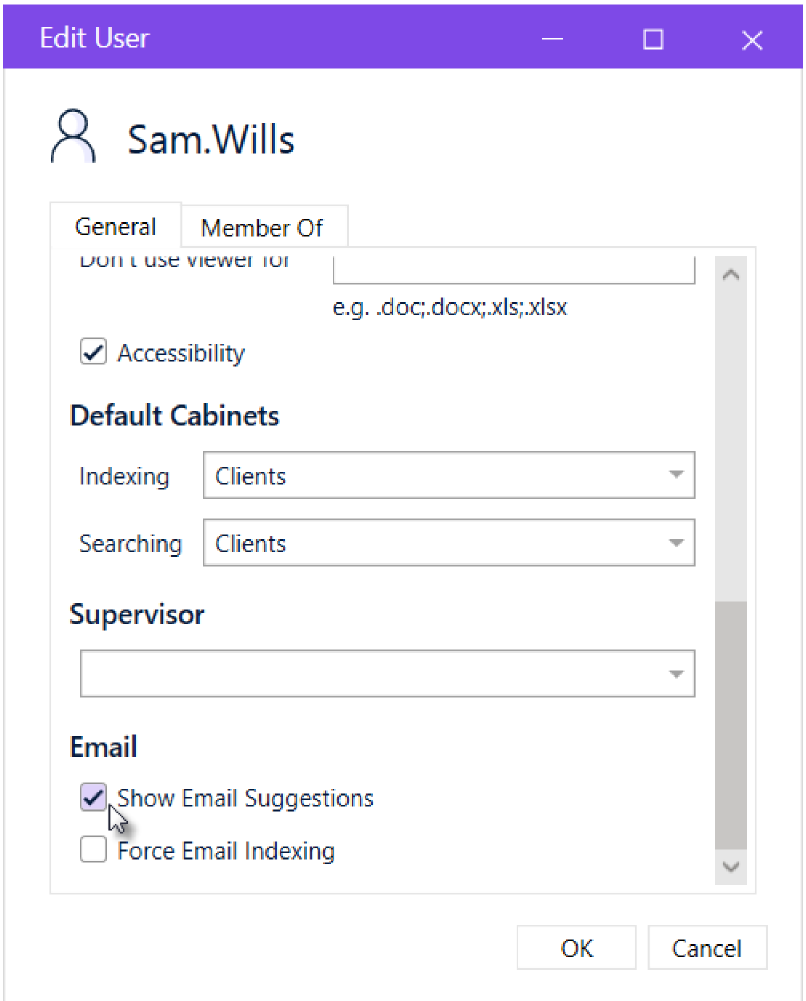


The window provides a list of cabinets that email suggestions can be configured for. Each cabinet can have a 'suggestion level' and a set of indexes for the cabinet.

The suggestion level can be set to Filing Cabinet, or Folder Levels 2, 3, 4 or 5. This sets the folder hierarchy level that the suggestions will display. For example, assuming a 'Clients' cabinet with a subfolder called 'JB00123 Joe Bloggs', selecting the Clients cabinet and a suggestion level of 'Folder Level 2' would result in the suggested indexing location "Clients > JB00123 Joe Bloggs" when Joe's email address is typed in the To field of a new email.

The 'Indexes' panel shows a list of indexes that apply to the chosen cabinet when displaying suggestions. Indexes can be selected from the drop-down list and chosen by clicking the 'Add' button on the right. Clicking the red cross next to an index will remove that index from the list of suggestions. The selected indexes will appear in Outlook in the order they are listed in this window.

Once email suggestions are configured, they must be enabled on a per-user basis before they can be seen in the Outlook Addin. The option to enable the suggestions is in the View Users section of the Admin area. Edit the User and tick the 'Show Email Suggestions' tickbox to enable the functionality for that User.

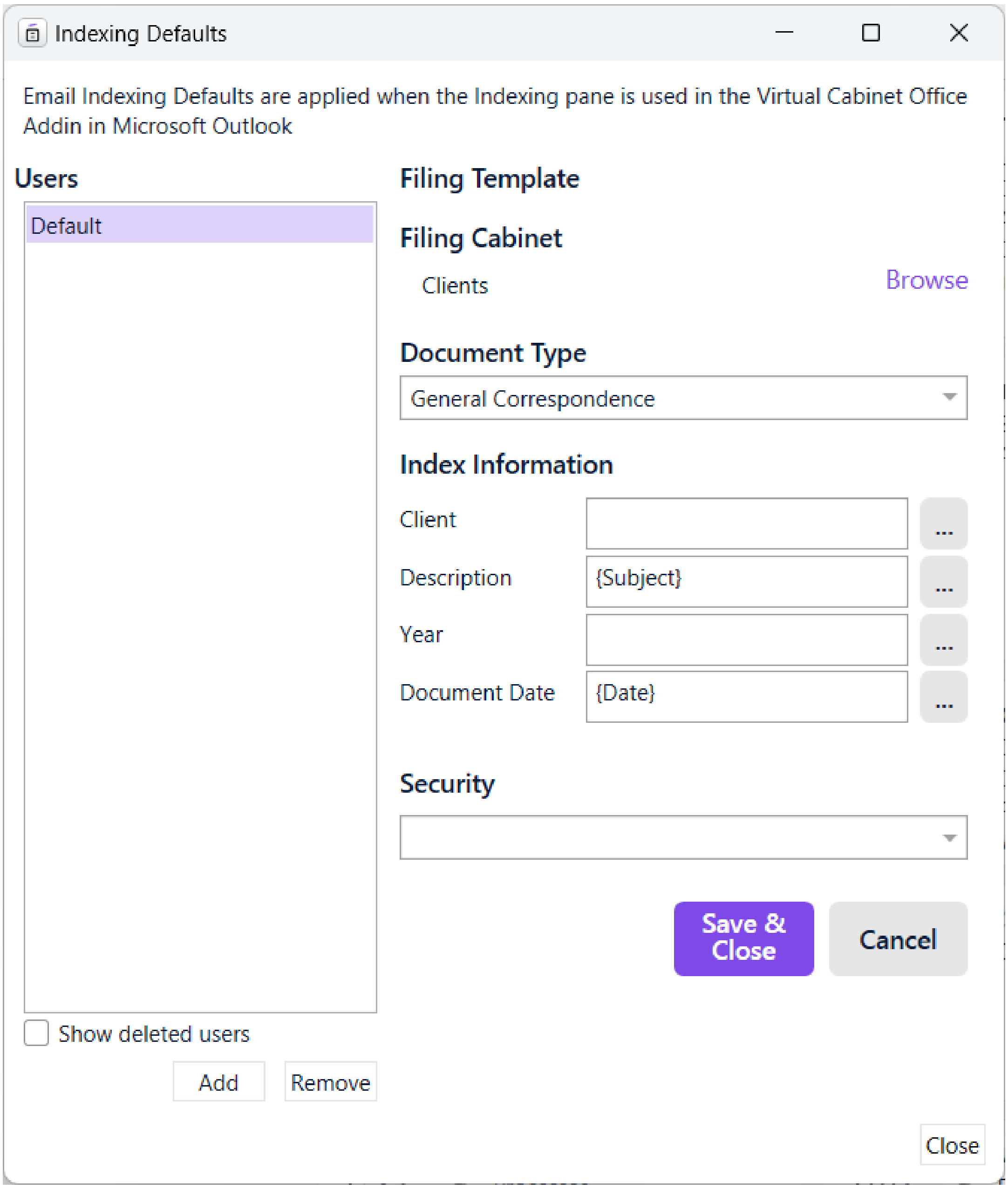


27.5 View Indexing Defaults

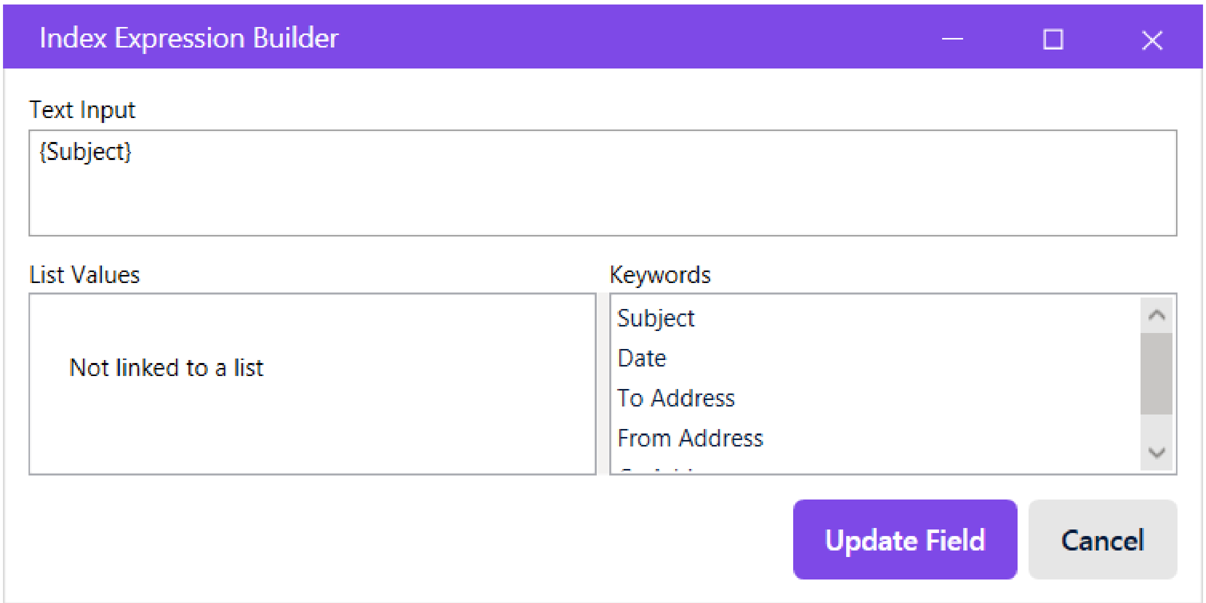
Further information on Indexing Defaults can be found in the Email Capture Guide.

The Indexing Defaults window allows you to configure detail indexing values for emails when the Indexing Pane is being used in Microsoft Outlook 2007 or later.

It is possible to configure a Default setting that applies to all users, but override this with settings for individual users (which each user can control themselves via the Outlook Addin).



As well as being able to specify static values for indexing values like Filing Cabinet and Section Value, you can also map email properties like {Subject} to index fields. Clicking the ellipses button adjacent to each index field will launch the Index Expression Builder which lists the available Email Properties, along with any Virtual Cabinet list values that may be associated with the index field. Double-click a value to add it to the Text Input area and click Update Field.

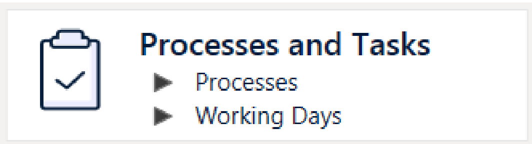


28 Processes and Tasks

Virtual Cabinet® 3.0 and upwards provide the means for you to define and automate the processes and tasks that help you run your business.

- Fully integrated business process and document management to improve the efficiency of your business
- Flexible and customizable setup allow you to create or adapt processes within minutes to suit your business objectives
- Tasks built around groups and roles to allow collaboration and sharing
- Start your process at any stage of a documents lifecycle
- Powerful reporting on outstanding and completed processes and tasks

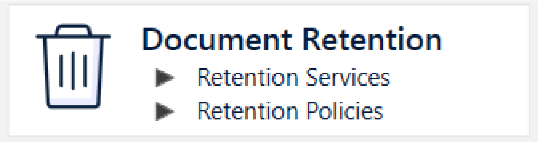
In Virtual Cabinet® a process is simply a collection of tasks, each task is assigned to a worker, group, or role, and has one or more actions associated with it. With this framework we provide you with the building blocks to configure pretty much any process you can imagine.



Processes and Tasks can be configured from the Admin Tab. See the separate Processes and Tasks Guide for further information.

29 Document Retention

Document Retention is an extra licenced feature that enables you to automatically manage documents that are at the end of their lifecycle. For example destroying all documents older than 7 years.



You can create a series of Retention Policies that will determine what actions will be applied to which documents when they reach a certain age. Retention Policies can be configured from the Admin tab by clicking on “View Retention Policies”. See the separate Document Retention Guide for further information.

The Retention Service is automatically installed on your server and will process the results of your Retention Policies. You can configure your Retention Service(s) through the Admin tab, “Configure Retention Services”. Configuration options:

Setting name	Description	Required
File Stores	Choose which File Stores this Retention Service should process documents for.	Yes